

Annual TV Review 2015

medialogic

The Only
Overnight

TAM Provider

In
Pakistan

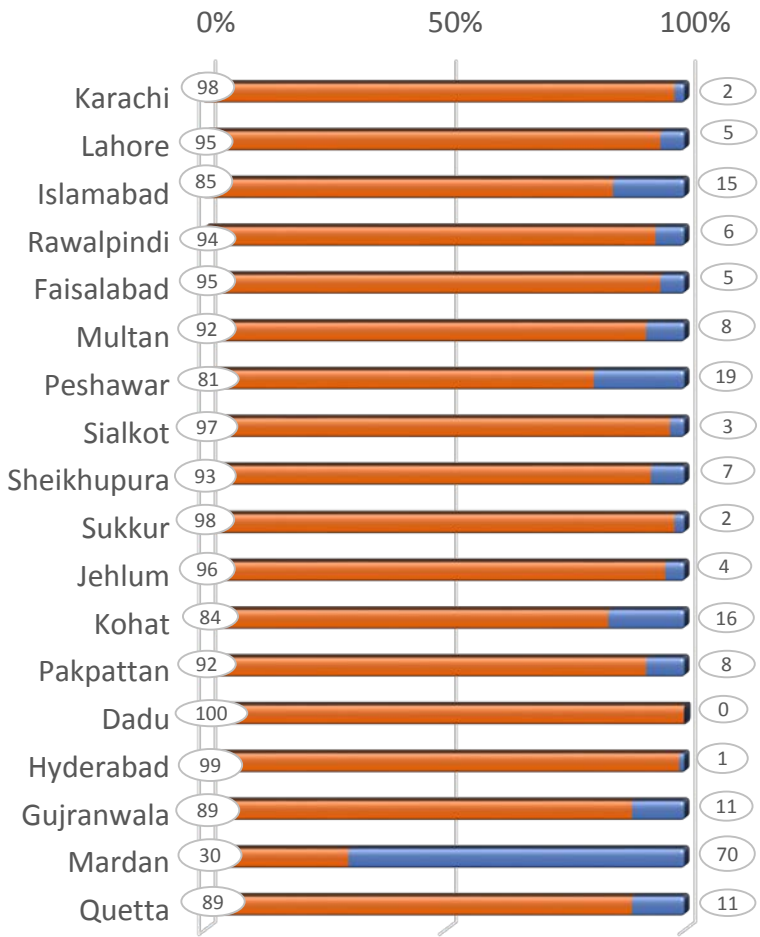


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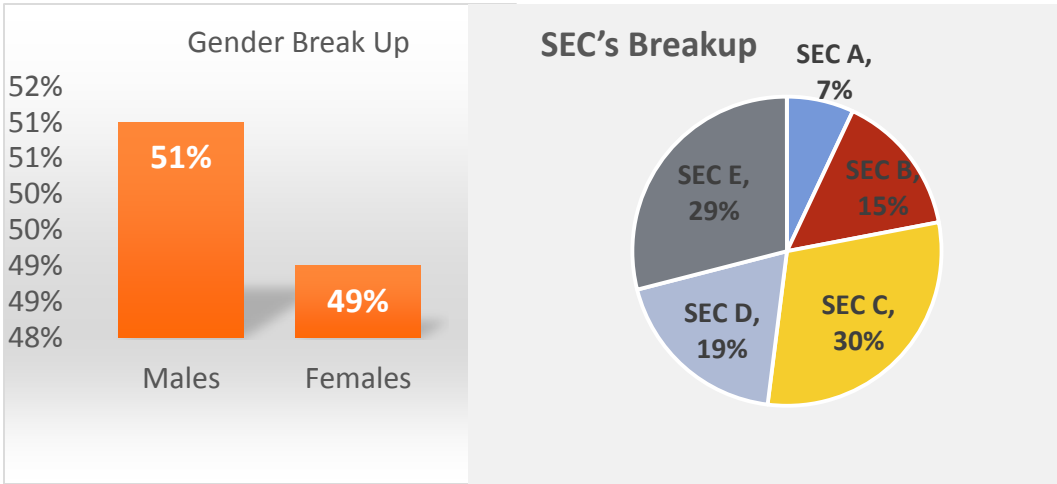
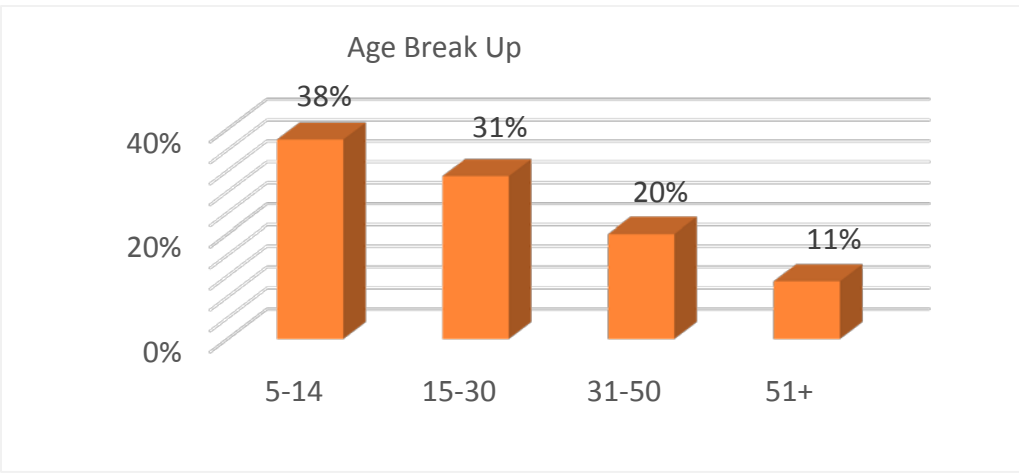
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PANEL COMPOSITION

City-wise Cable Penetration



■ Cable ■ Antenna



CHANNEL LIST BY GENRE

NEWS	ENTERTAINMENT	SPORTS	KIDS	MUSIC
AAJ NEWS	A PLUS	GEO SUPER	CARTOON NETWORK PAK	8XM
ABB TAK	ARY DIGITAL	PTV SPORTS	DISNEY	ARY MUSIK
ARY NEWS	ARY ZINDAGI	TEN SPORTS	NICKELODEON	JALWA
BUSINESS PLUS	ATV	FOOD	POGO	VIBE TV
CAPITAL TV	DUNYA ENTERTAINMENT		MOVIES	
CHANNEL 24	EXPRESS ENTERTAINMENT	MASALA TV	AXN	
CHANNEL 5	FILMAZIA	ZAIQA	FILM WORLD	
CITY 42	GEO ENTERTAINMENT	REGIONAL	FILMAX	
DAWN NEWS	GEO KAHANI	APNA CHANNEL	HBO	
DIN NEWS TV	HUM SITARAY	ARUJ TV	RAAVI TV	
DUNYA NEWS	HUM TV	AVT KHYBER	SILVER SCREEN	
EXPRESS NEWS	INDUS VISION	AVT KHYBER NEWS	STAR LITE TV	
GEO NEWS	NEO TV	AWAZ	STAR MOVIES	
GEO TEZ	PLAY MAX	DHARTI TV	WB	
JAAG TV	PTV GLOBAL	KASHISH	RELIGIOUS	
K21	PTV HOME	KAY 2	ARY QTV	
KOHENOOR	TIMES	KTN		
METRO 1 NEWS	TV ONE	KTN NEWS		
NEO TV	URDU 1	MEHRAN TV		
NEWS ONE	*SEE TV	PASHTO 1		
92 NEWS HD		PTV BOLAN		
PTV NEWS		PTV NATIONAL		
PTV WORLD		PUNJAB TV		
ROYAL NEWS		SINDH TV		
ROZE NEWS		SINDH TV NEWS		
SAMAA		VSH NEWS		
SUCH TV		WASEB		
WAQT NEWS				

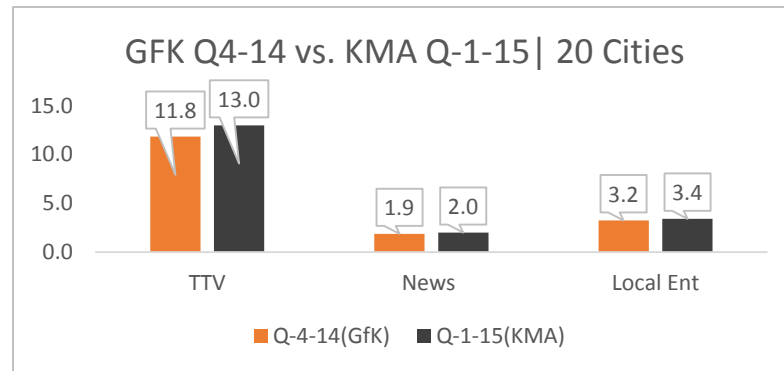
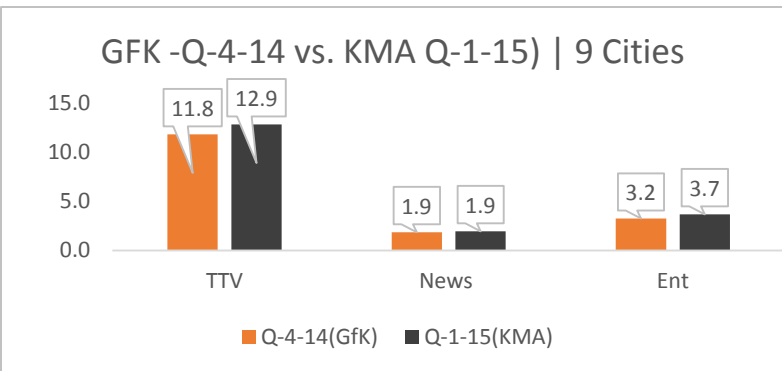
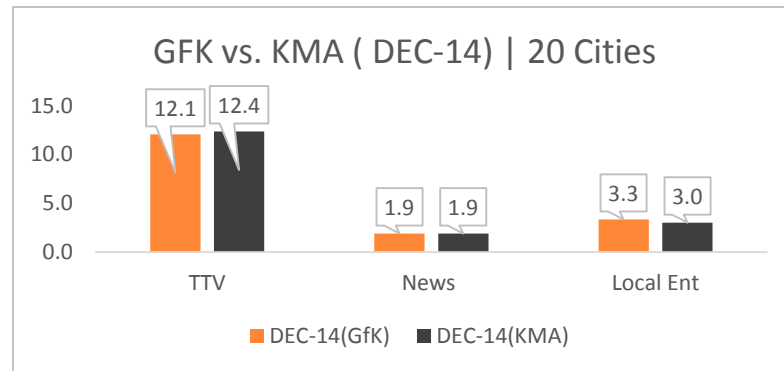
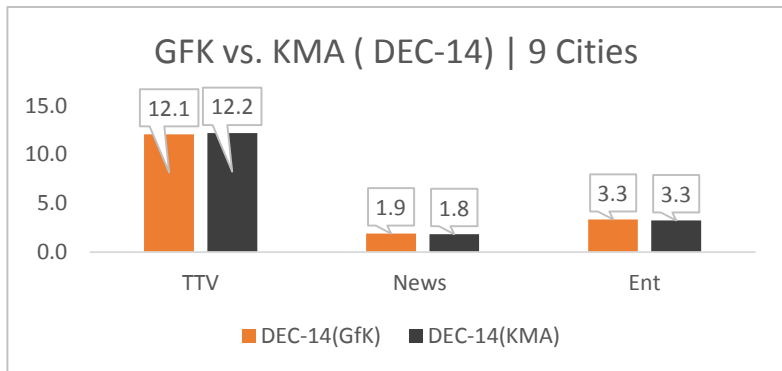
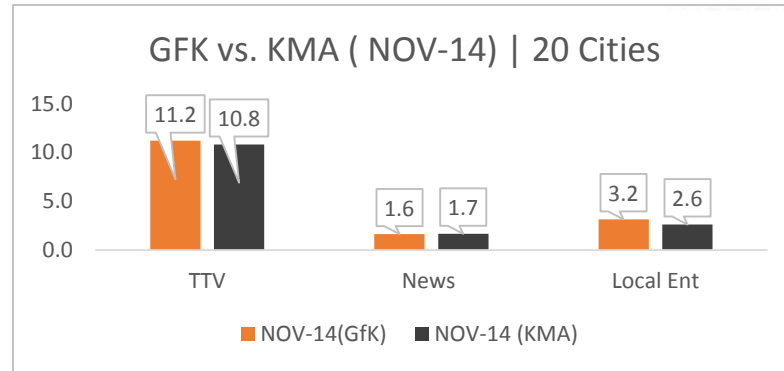
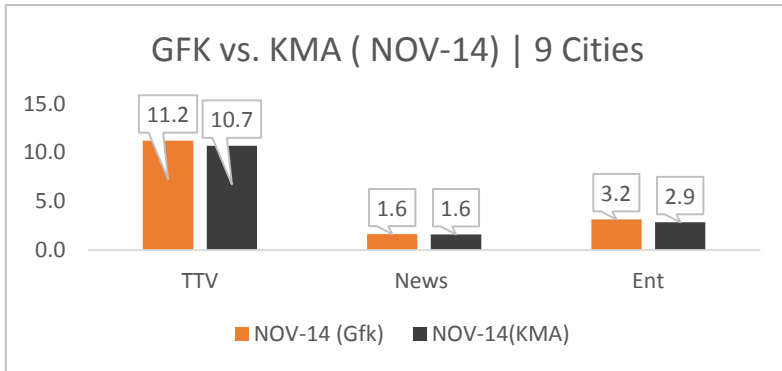
PANEL CHANGES 2015

2015 SAW A MAJOR SHIFT IN DATA SOURCE:

- **GFK TO KANTAR TECHNOLOGY**
- **METERS CHANGED FROM FREQUENCY MATCHING TO AUDIO MATCHING**
- **PANEL EXPANSION FROM 9 CITIES TO 20 CITIES**
- **PANEL SIZE GREW FROM 675 TO 900 HOUSEHOLDS**
- **TOTALLY NEW PANEL BASED ON ESTABLISHMENT SURVEY 2014**
- **BOTH PANELS RAN IN PARALLEL TO ENABLE SMOOTH DATA TRANSITION**

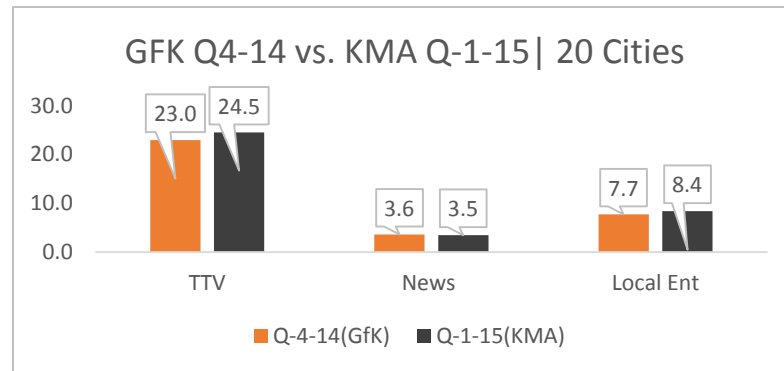
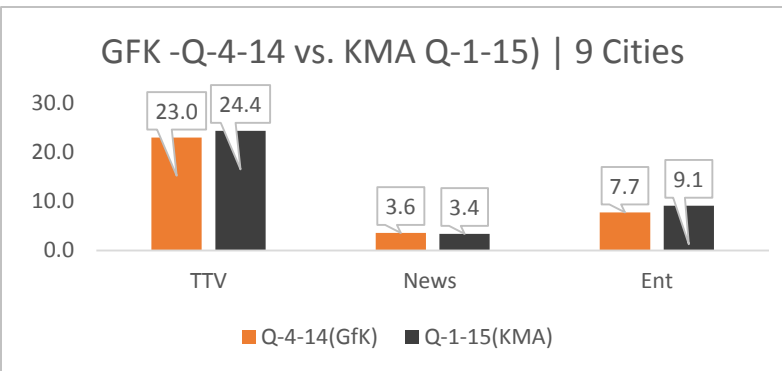
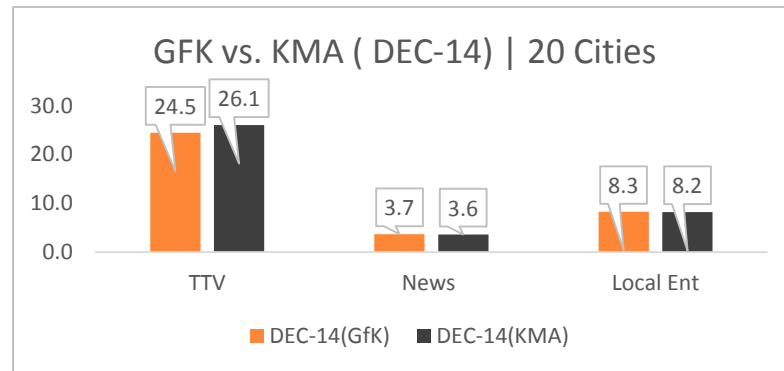
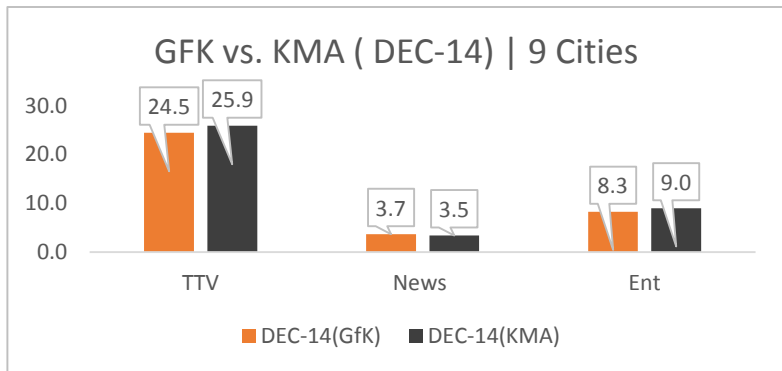
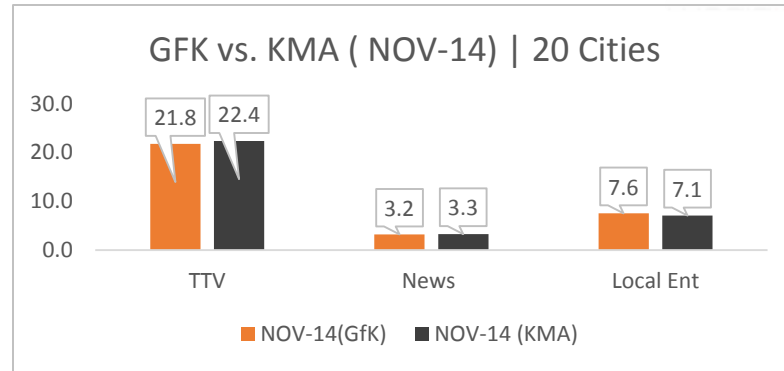
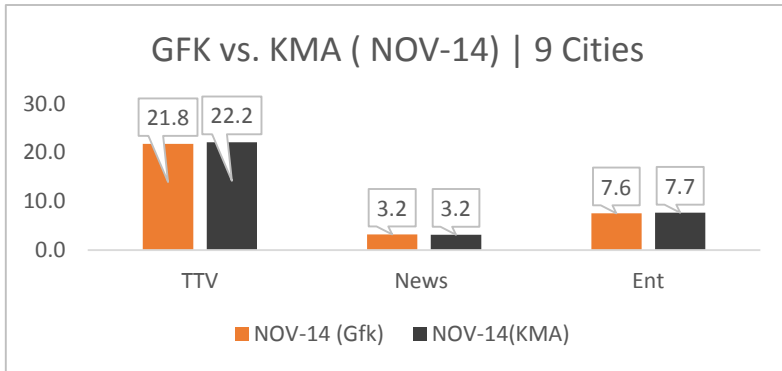
GFK vs. KMA RATINGS COMPARISON

TARGET GROUP C&S IND (TOTAL DAY)









GFK vs. KMA RATINGS COMPARISON

TARGET GROUP C&S IND (PRIME TIME 6 PM TO 11 PM)



AVERAGE VIEWING PER DAY

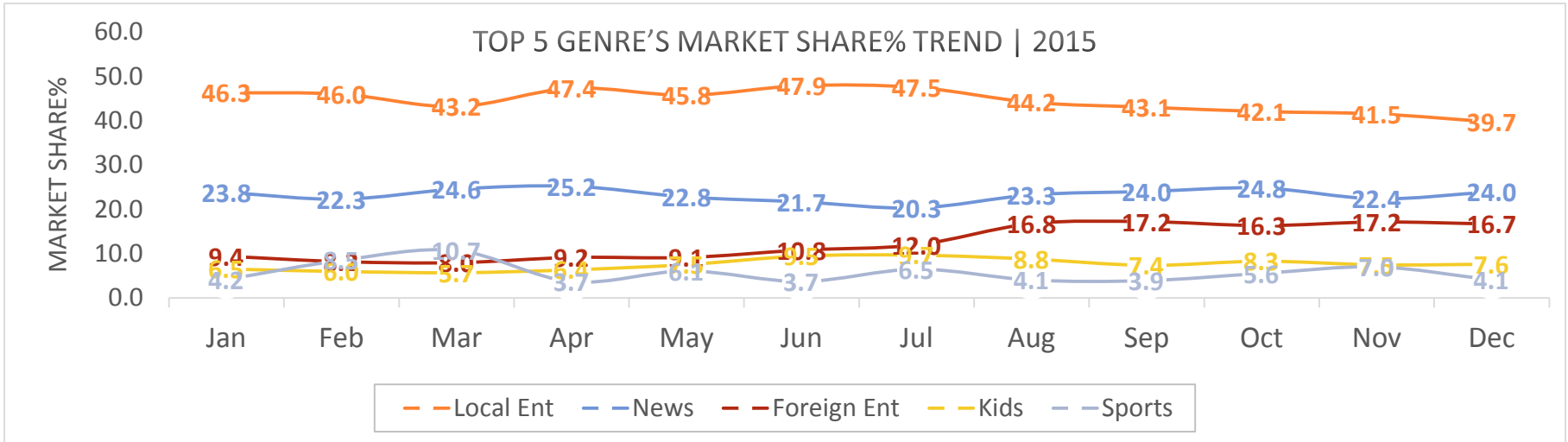
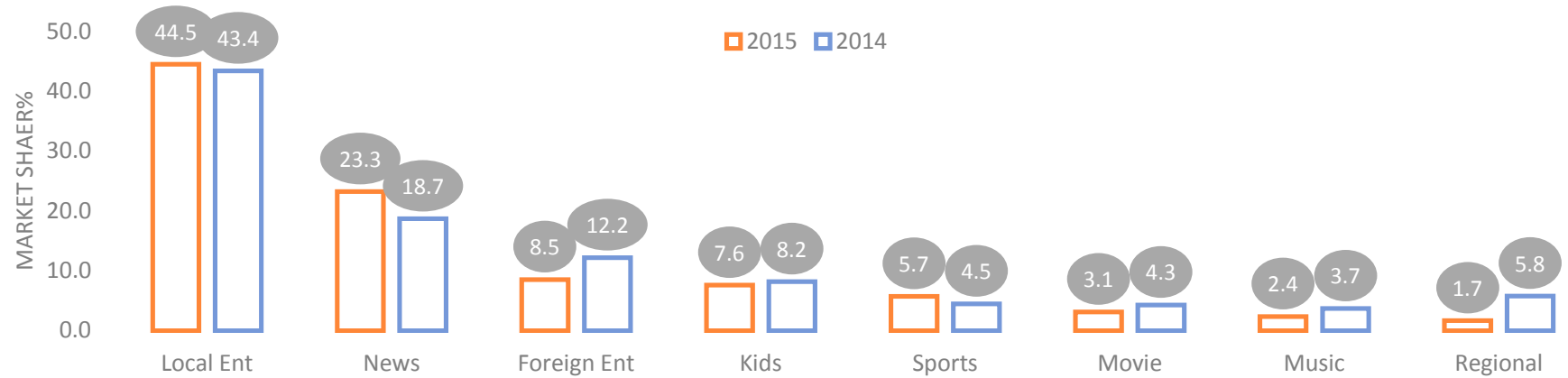
2013, 2014 AND 2015

	2013	2014	2015	
ALL HOUSEHOLDS	05:38:00	05:22:00	06:12:00	
ALL INDIVIDUALS	02:48:00	02:43:00	03:04:00	
ALL MALES	02:34:00	02:30:00	02:55:00	
ALL FEMALES	03:03:00	02:57:00	03:14:00	
ALL C&S IND	02:59:00	02:55:00	03:08:00	
FEMALES (15-45 C&S)	03:24:00	03:16:00	03:27:00	

Viewing Time Per Day has increased in 2015 All Males viewing increased 25 minutes as compared to 2014.

GENRE-WISE MARKET SHARE%

2014 vs. 2015 TOTAL IND



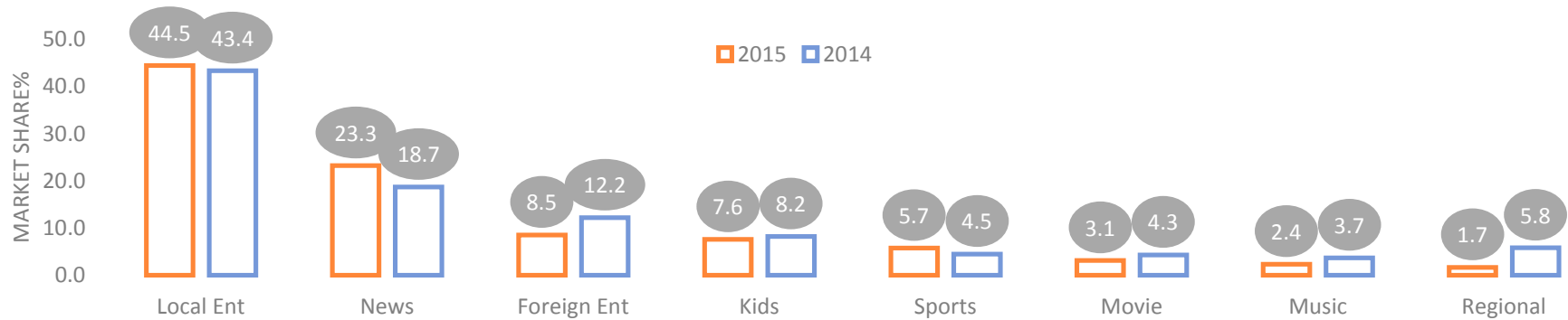
Disclaimer: Market Share% is based 90+ Channels being monitored for ratings (In-House/Unmatched) is not included to calculate genre-wise market share.



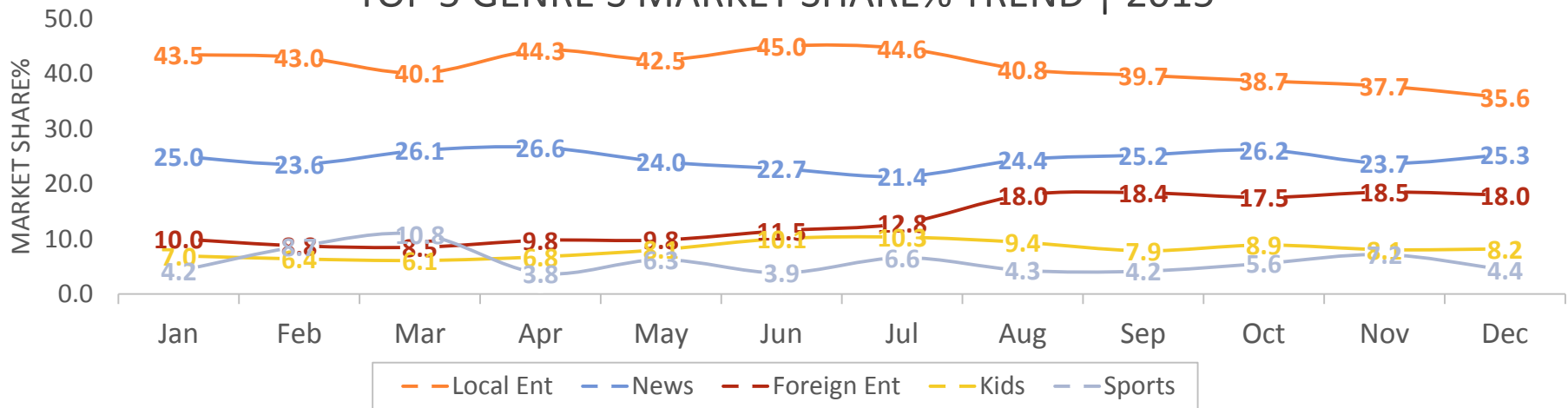
There is no significant change in Ent genre , Comparing 2014 News genre' market share% increased 4% in 2015.

GENRE-WISE MARKET SHARE%

2014 vs. 2015 C&S IND



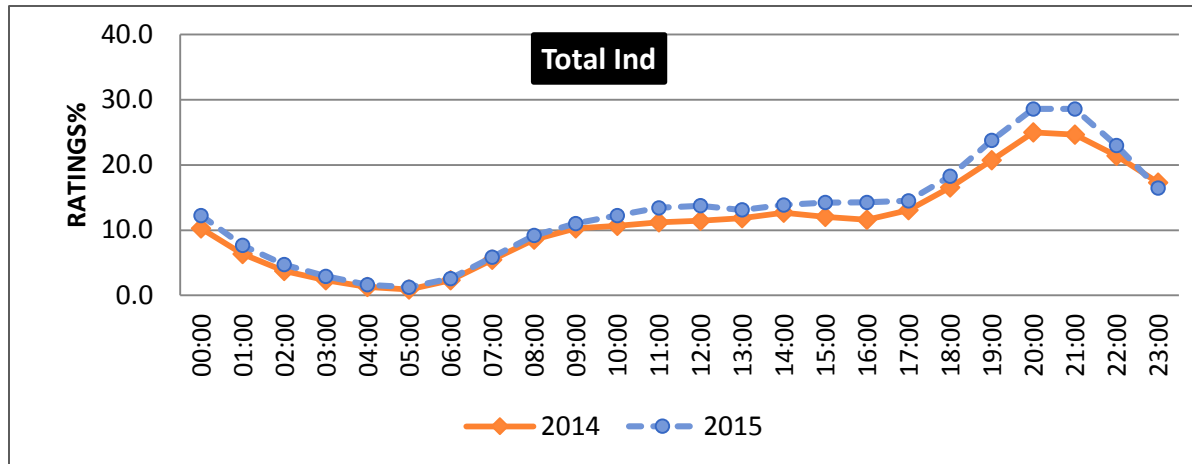
TOP 5 GENRE'S MARKET SHARE% TREND | 2015



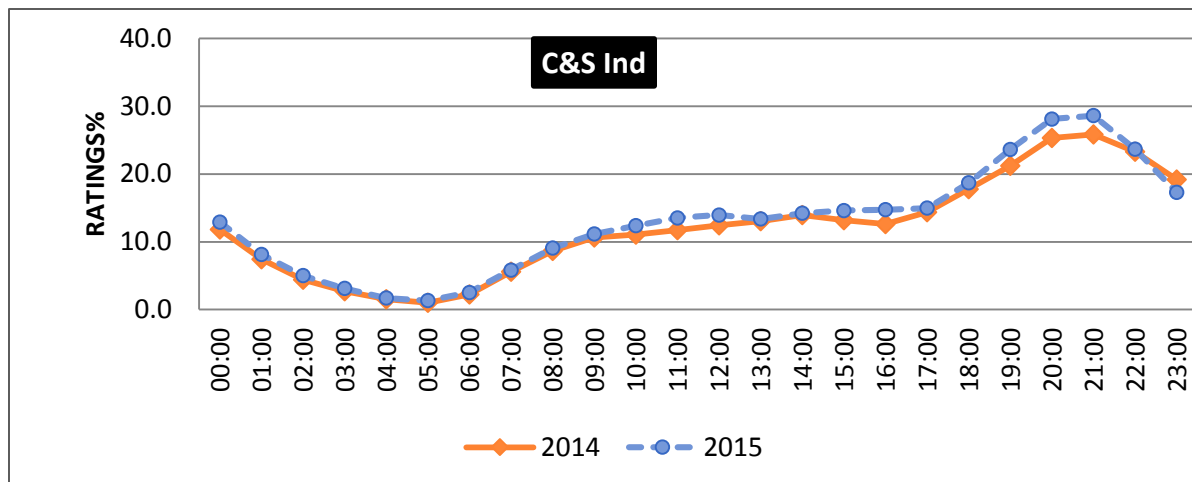
Disclaimer: Market Share% is based 90+ Channels being monitored for ratings (In-House/Unmatched) is not included to calculate genre-wise market share.

TIME BAND UTILIZATION

2014 VS. 2015



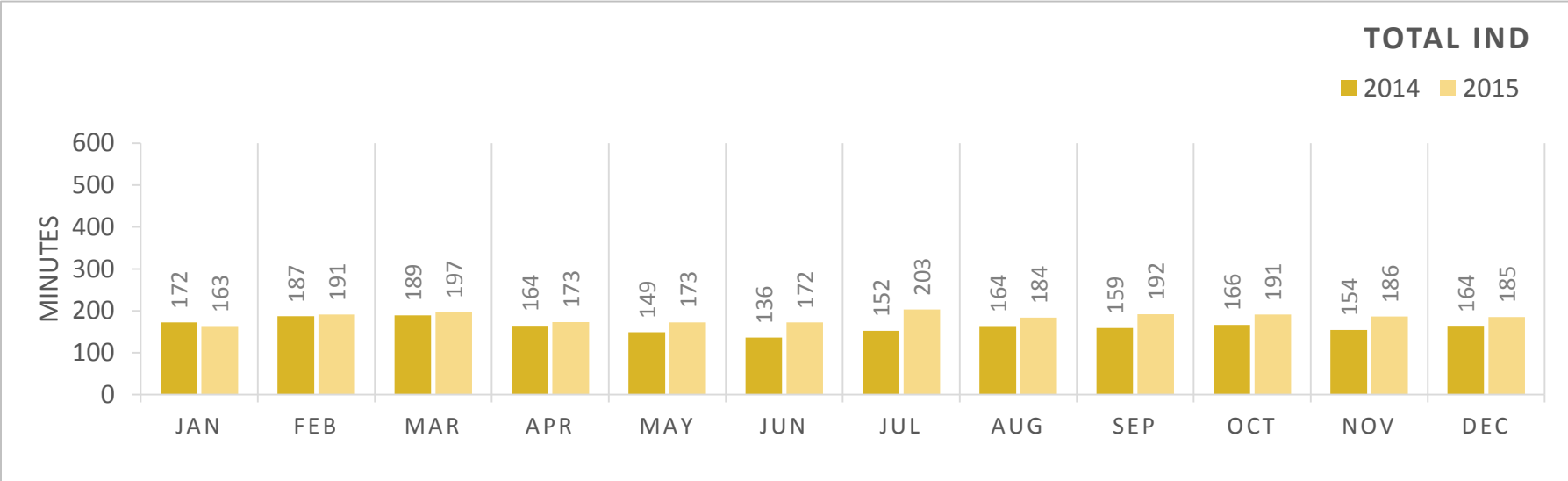
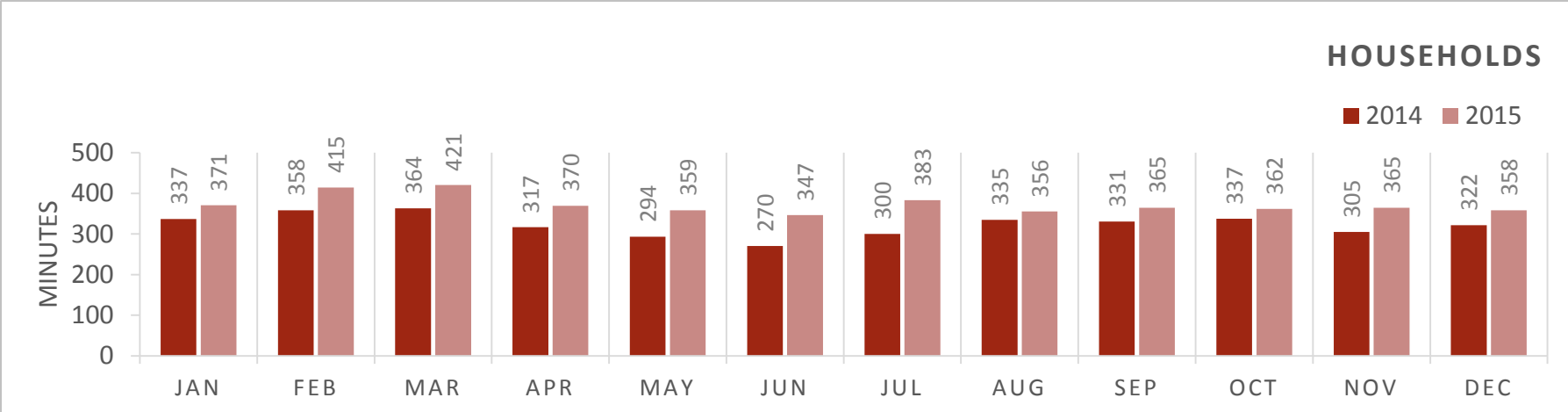
Total Ind			
Time Band	2014	2015	Ch%
08:00 - 11:00	9.8	10.8	10%
11:00 - 17:00	11.8	13.8	17%
17:00 - 19:00	14.8	16.4	10%
19:00 - 21:00	22.9	26.2	14%
21:00 - 23:00	23.0	25.8	12%
23:00 - 00:00	17.3	16.5	-5%



C&S Ind			
Time Band	2014	2015	Ch%
08:00 - 11:00	10.1	10.8	7%
11:00 - 17:00	12.8	14.1	10%
17:00 - 19:00	16.1	16.8	5%
19:00 - 21:00	23.3	25.9	11%
21:00 - 23:00	24.6	26.1	6%
23:00 - 00:00	19.2	17.3	-10%

VIEWERSHIP MINUTES CONSUMPTION

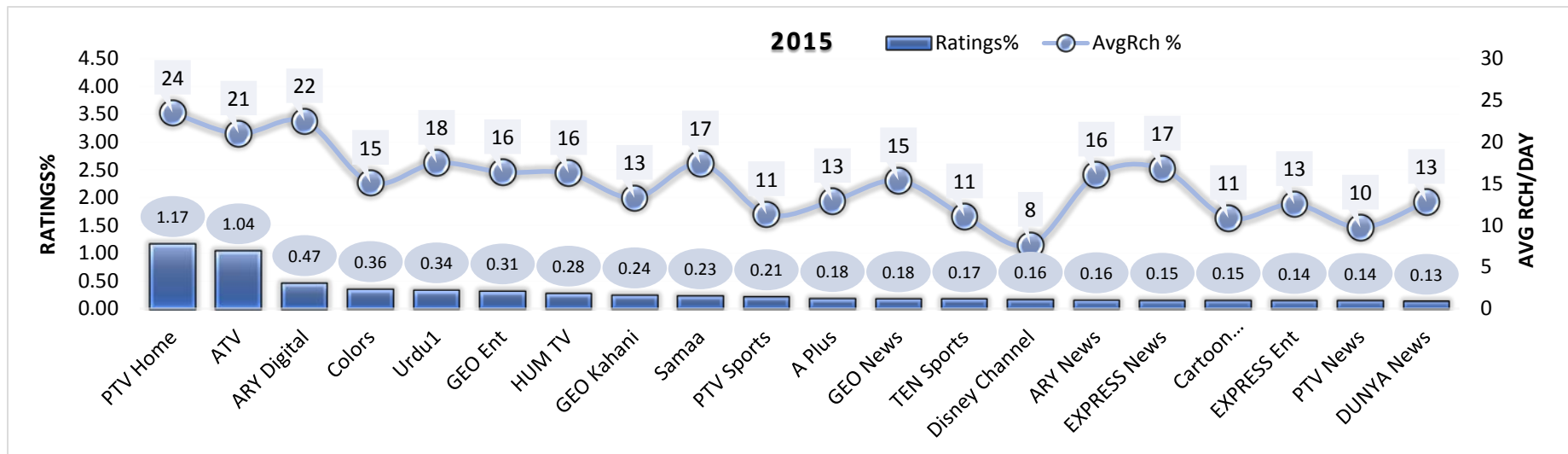
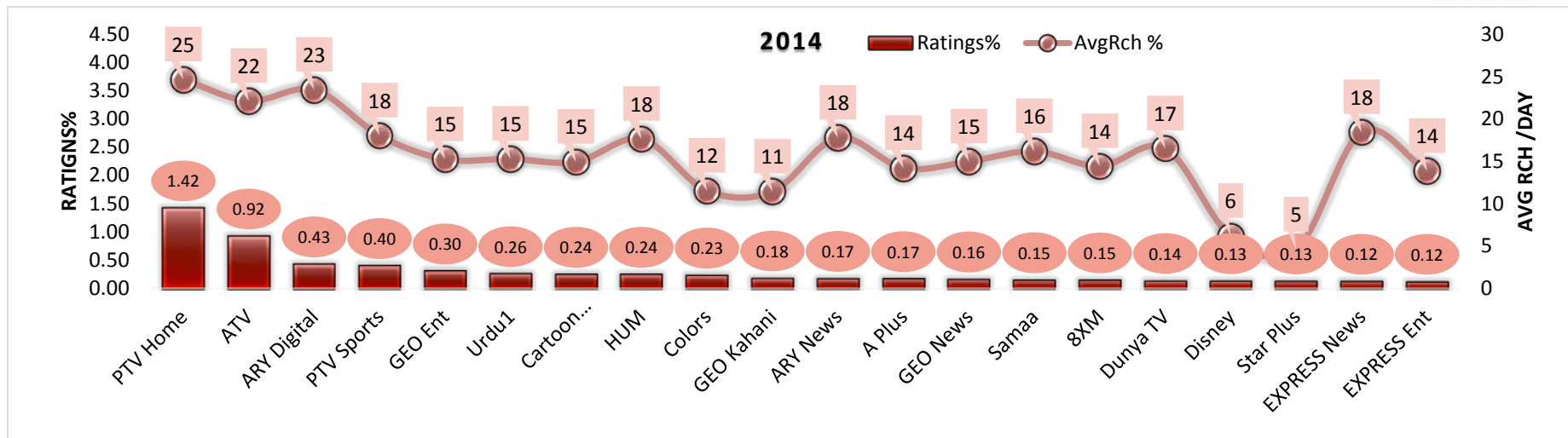
2014 vs. 2015



Comparing 2014 Average Minutes Consumption increased throughout the year in 2015 .

TOP 20 CHANNELS

2014 vs. 2015 TOTAL IND | PAK TOTAL

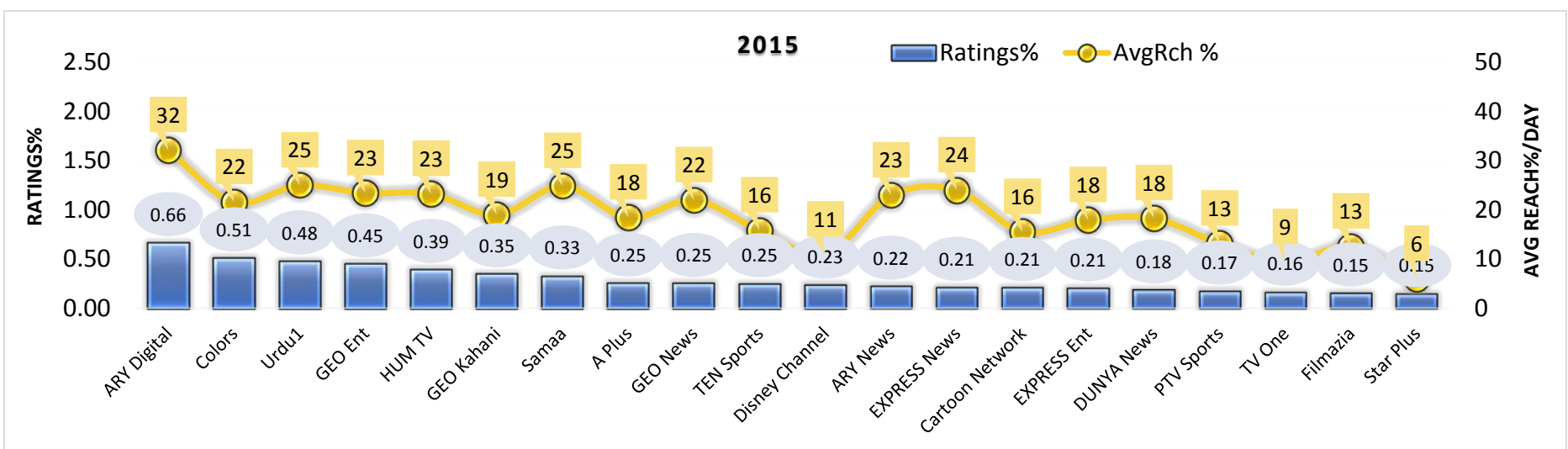
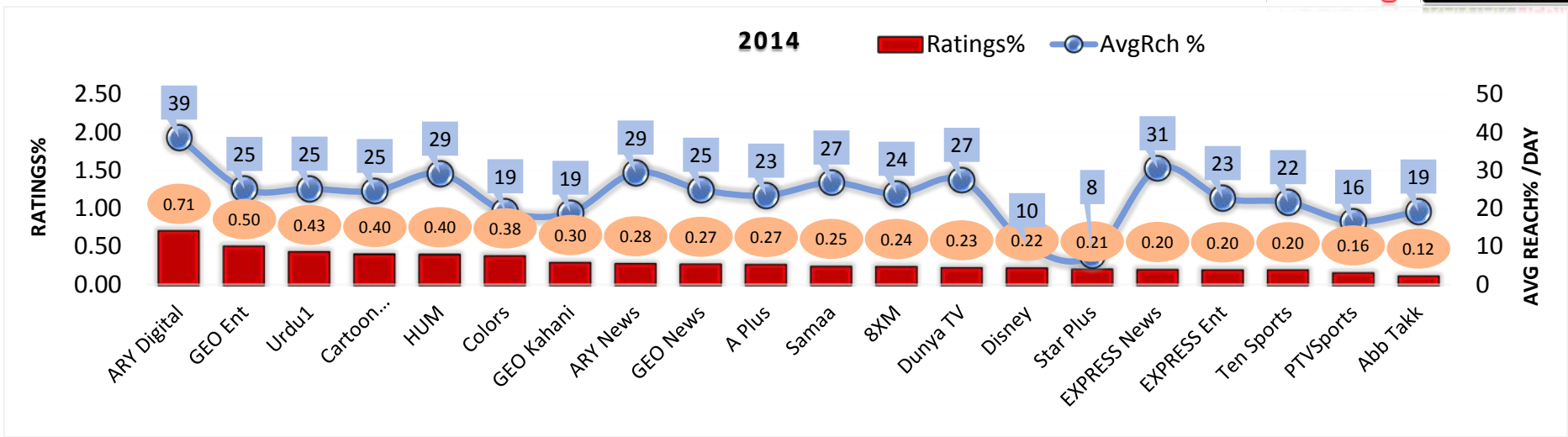


PTV HOME AND ATV LEADING THE TOP 20 CHANNELS ON TOTAL PAK, SINCE THEY GET MOST OF THE VIEWING FROM TERRESTRIAL

TERRESTRIAL HAS HIGHER RATIOS ON PAK TOTAL AS COMPARE TO PAK URBAN

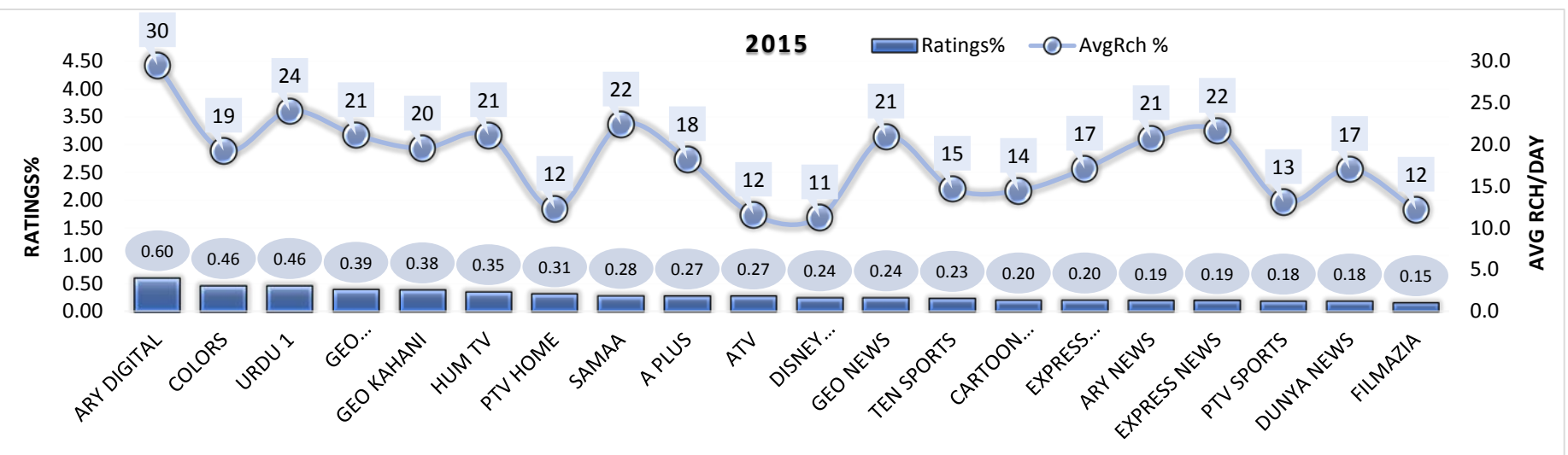
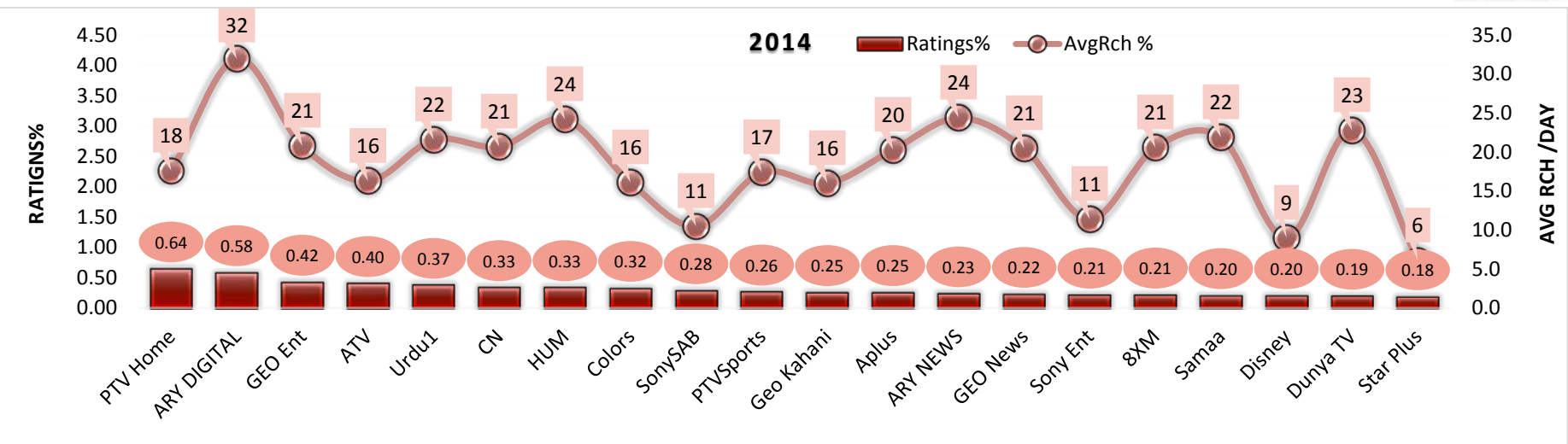
TOP 20 CHANNELS

2014 vs. 2015 C&S IND | PAK TOTAL



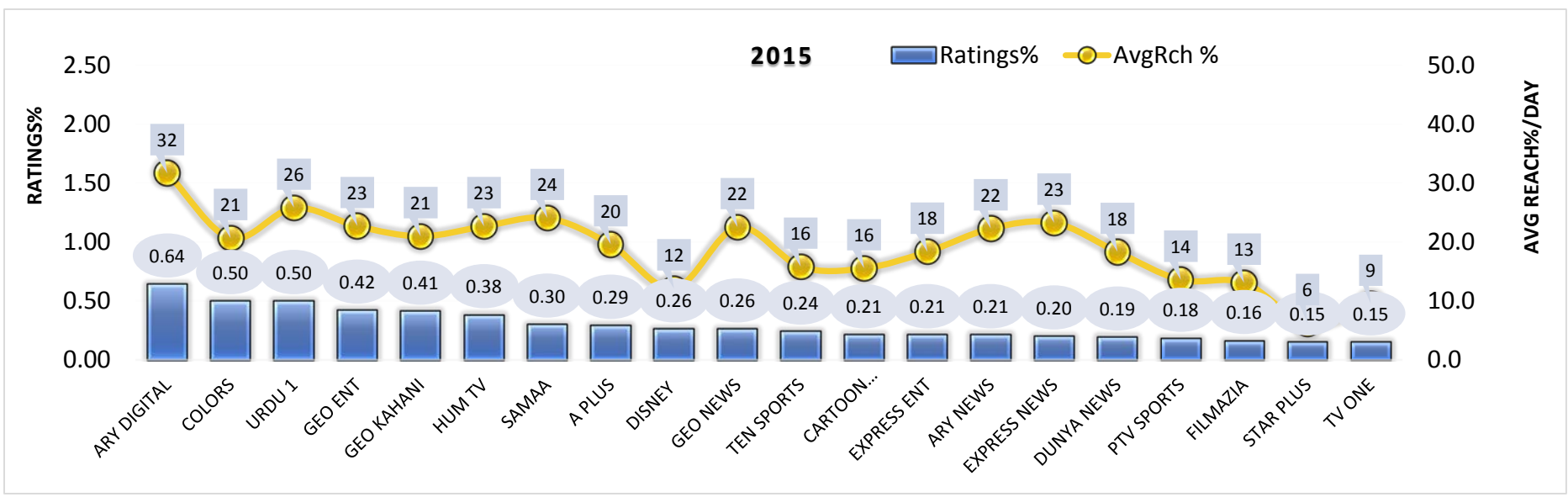
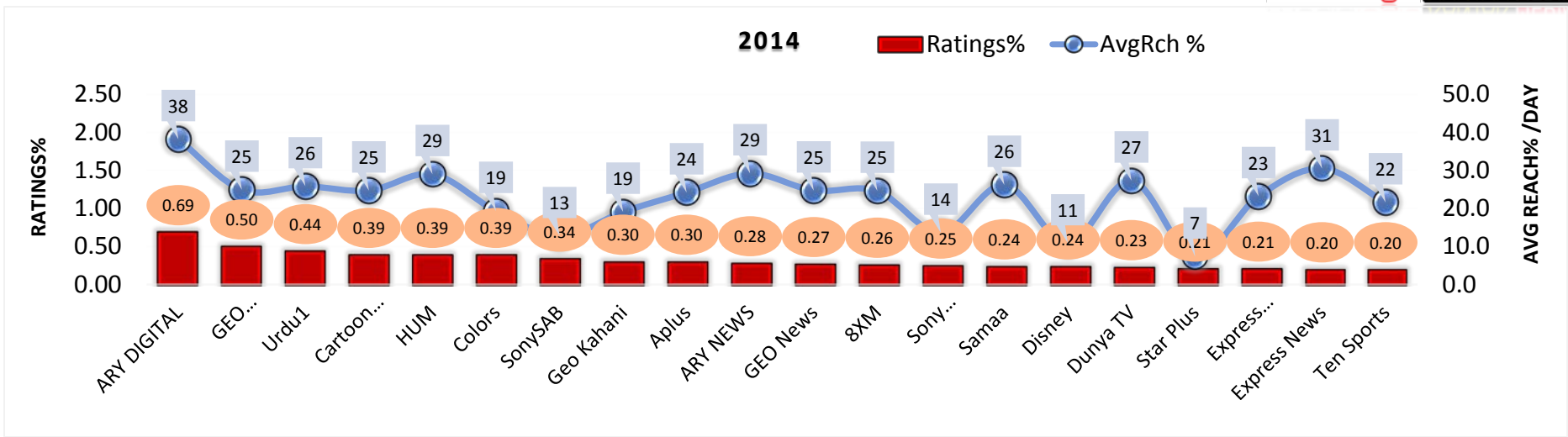
TOP 20 CHANNELS

2014 vs. 2015 TOTAL IND | PAK URBAN



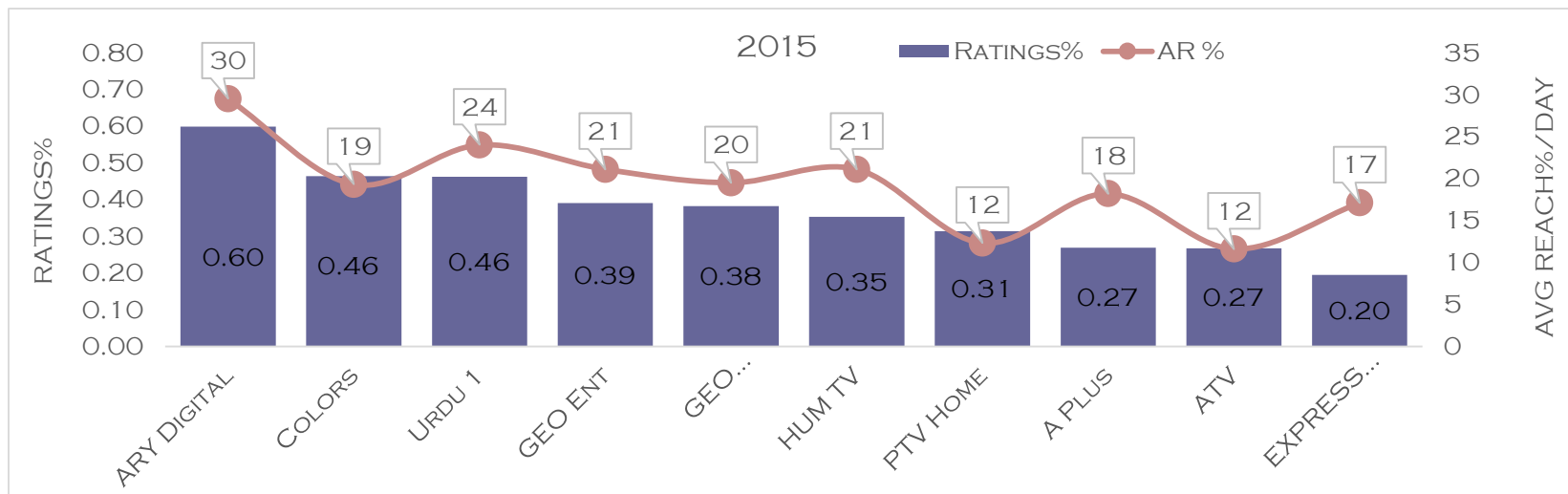
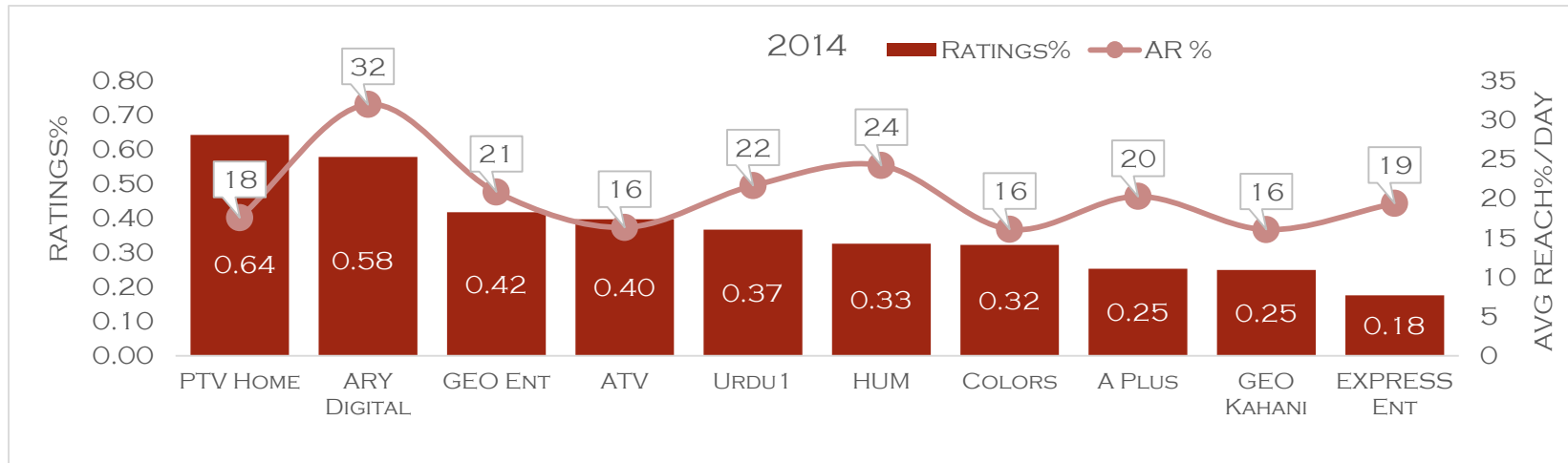
TOP 20 CHANNELS

2014 vs. 2015 C&S IND | PAK URBAN



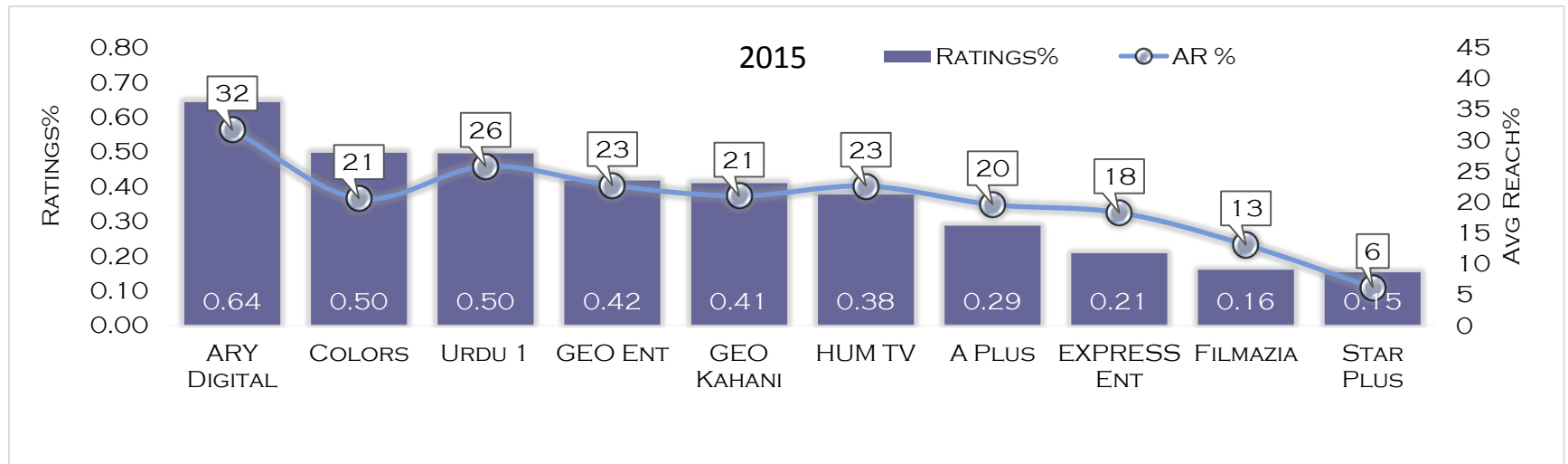
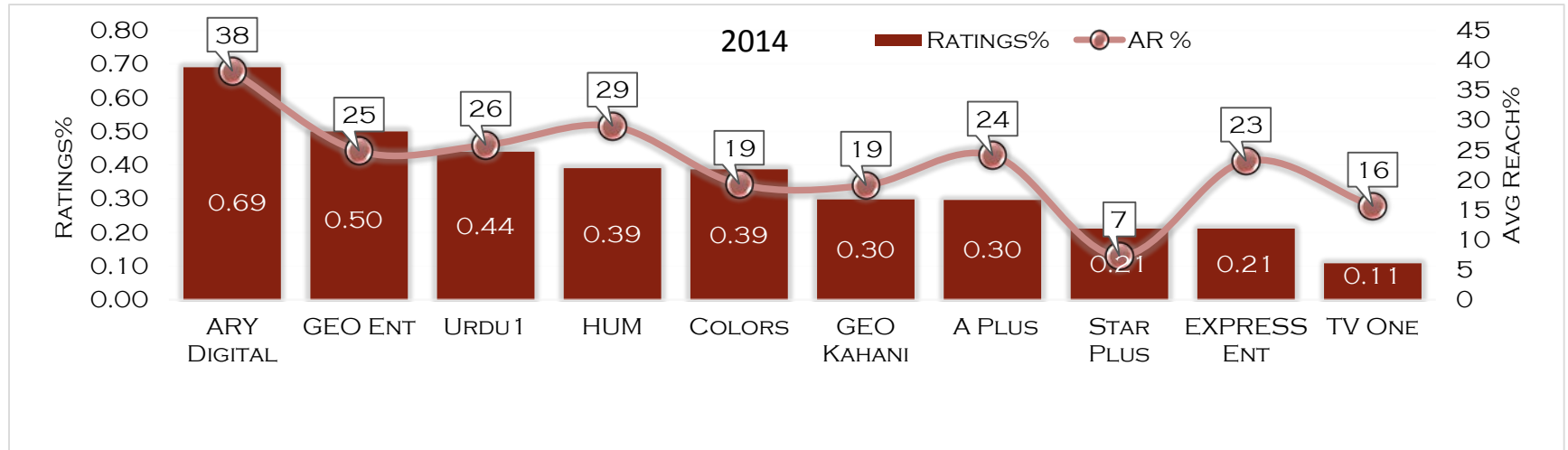
TOP 10 ENT CHANNELS

2014 vs. 2015 TOTAL IND



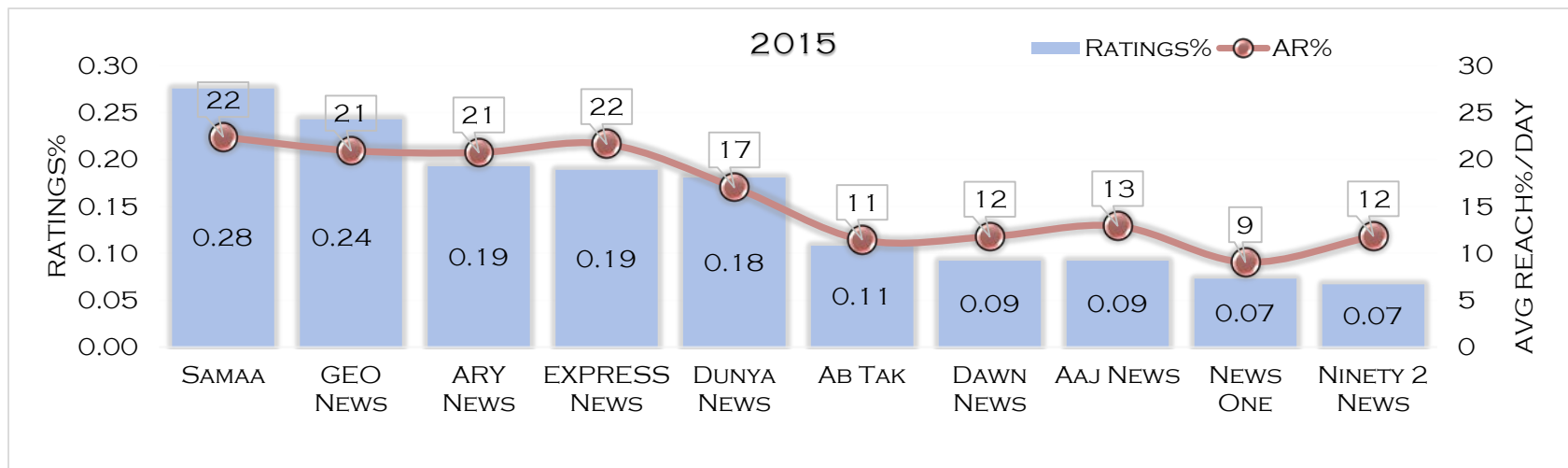
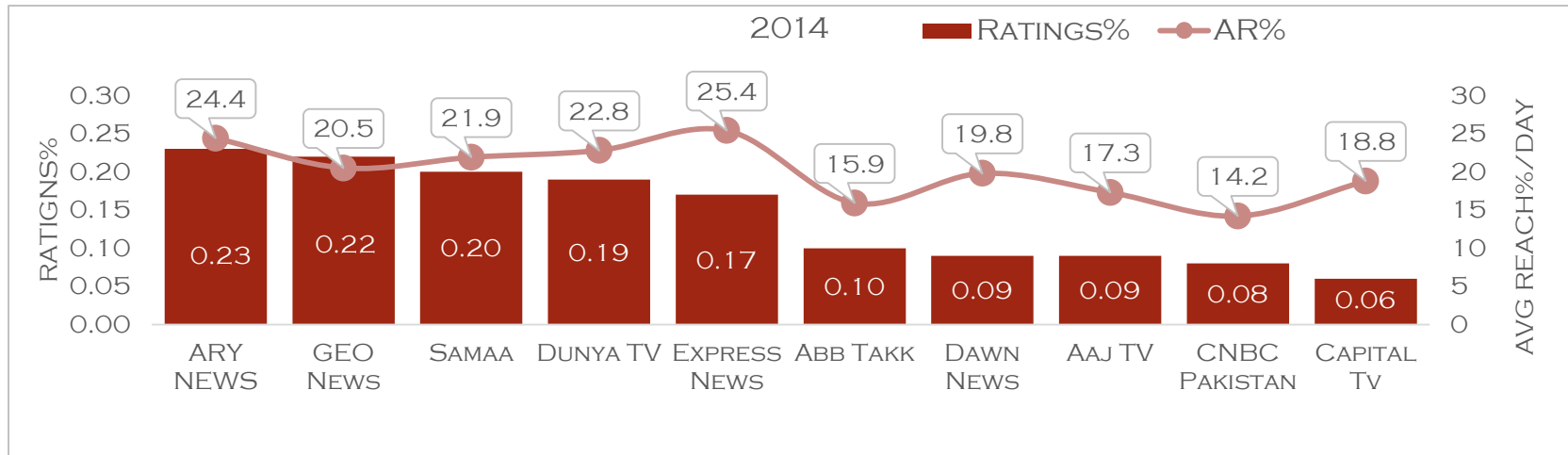
TOP 10 ENT CHANNELS

2014 vs. 2015 : C&S IND



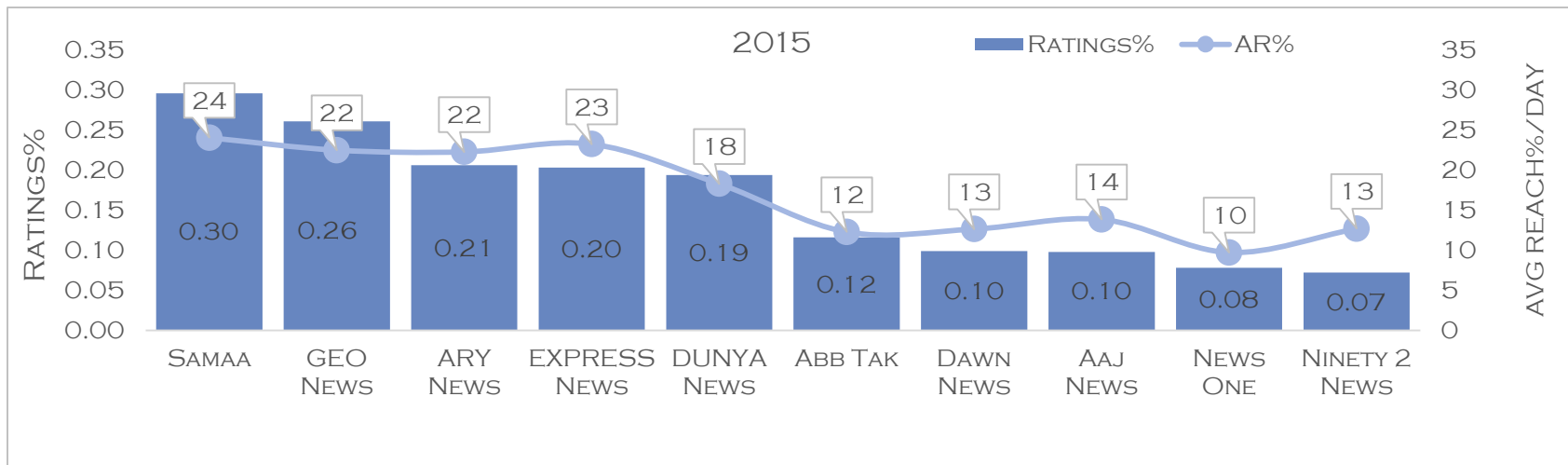
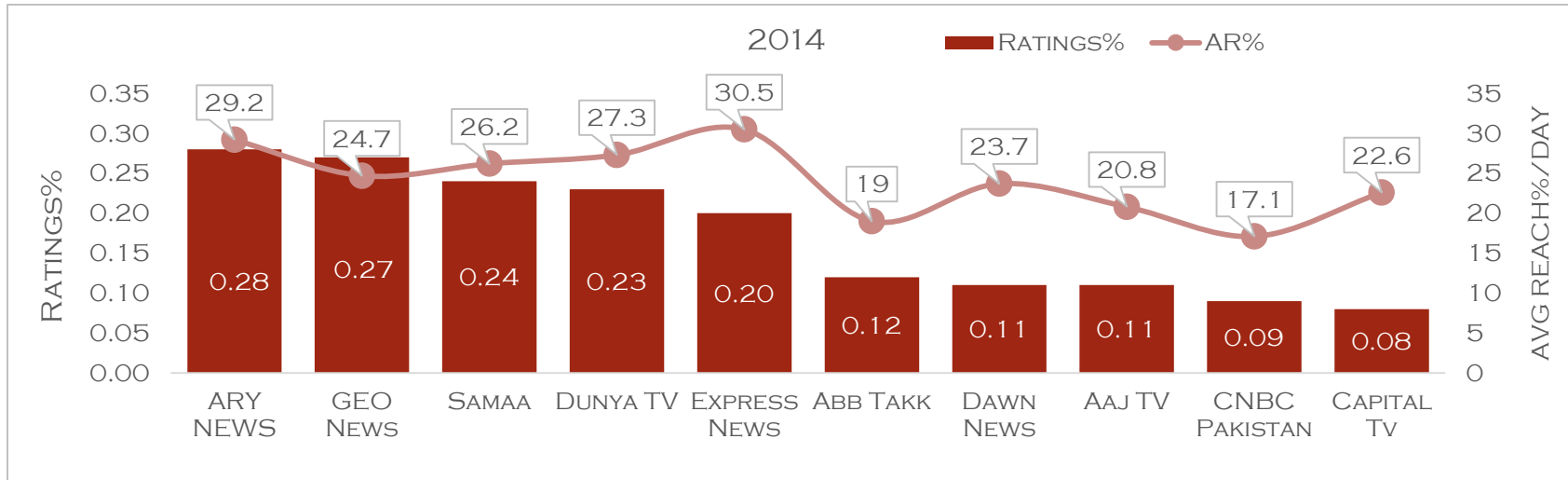
TOP 10 NEWS CHANNELS

2014 vs. 2015 TOTAL IND



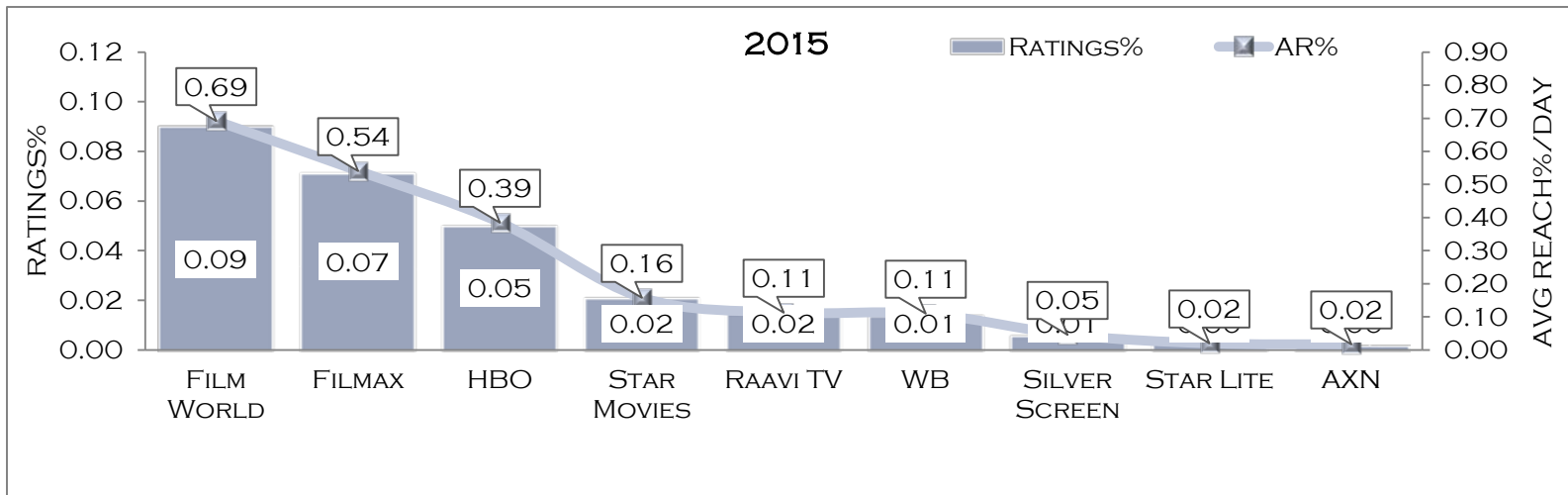
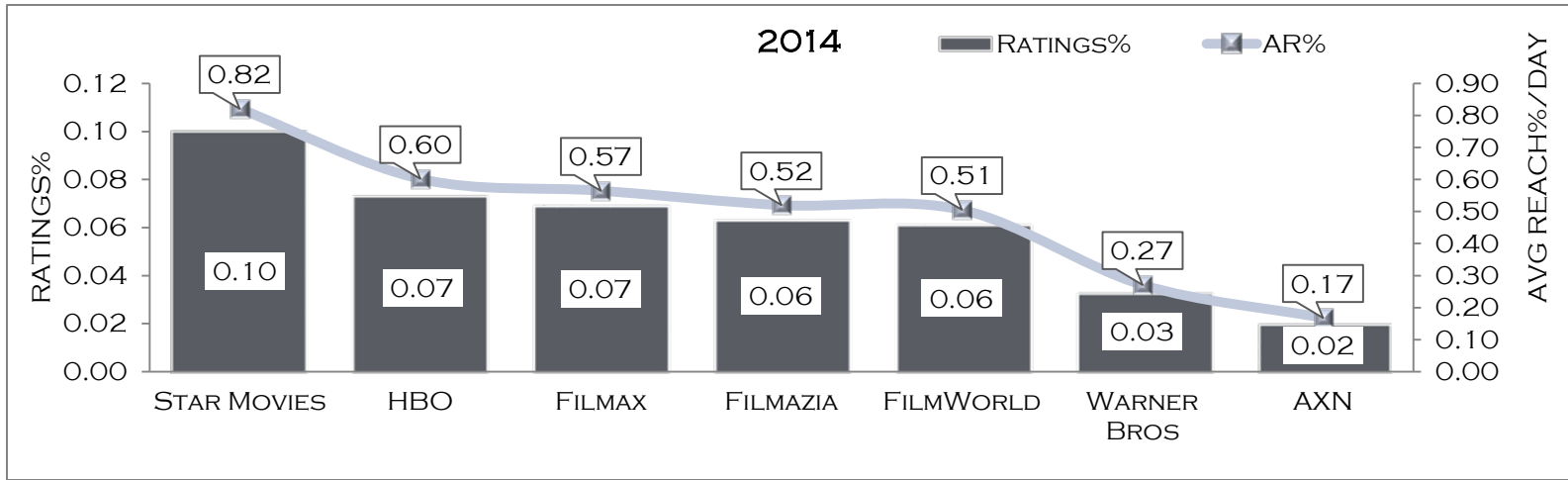
TOP 10 NEWS CHANNELS

2014 vs. 2015 C&S IND



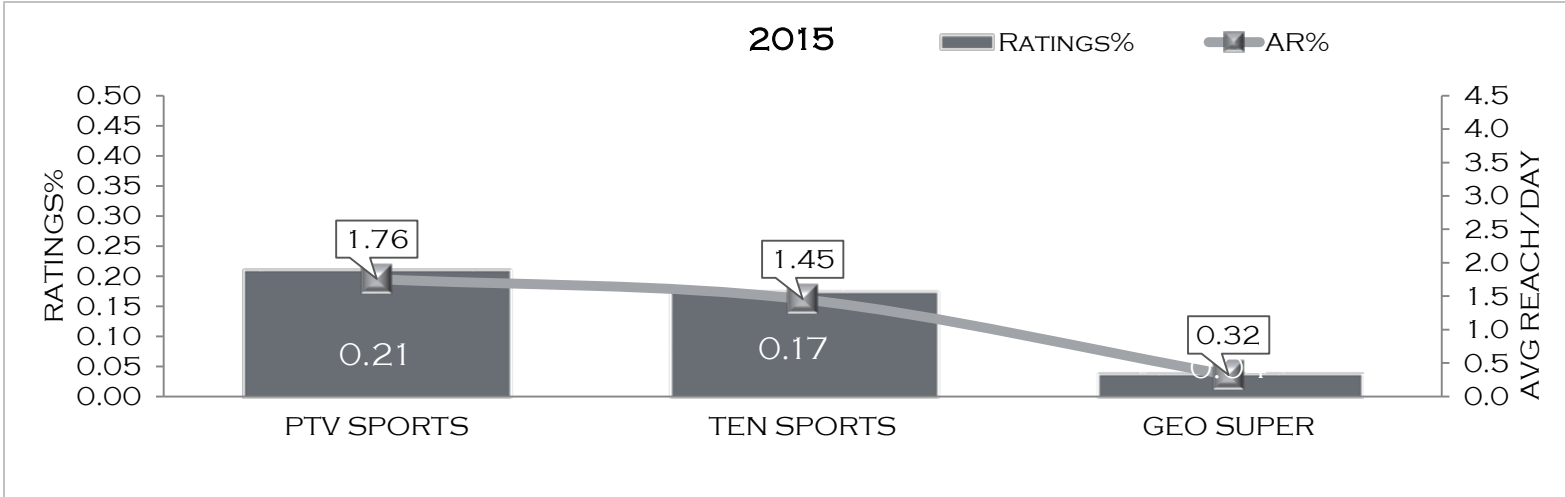
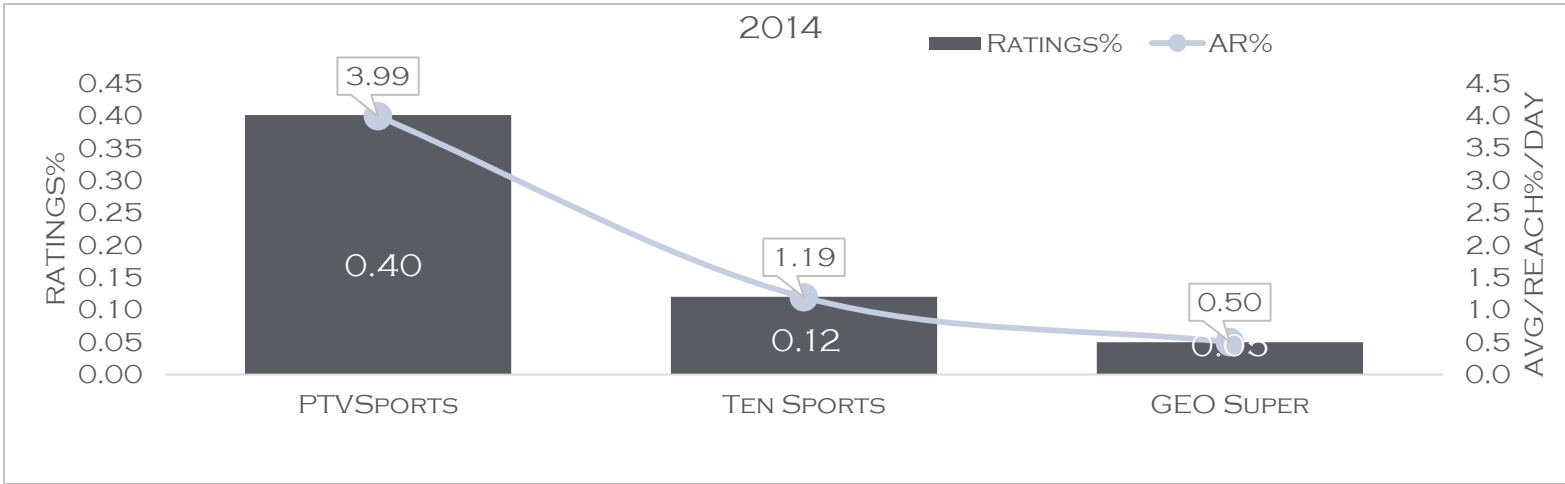
MOVIE CHANNELS

2014 vs. 2015 C&S IND



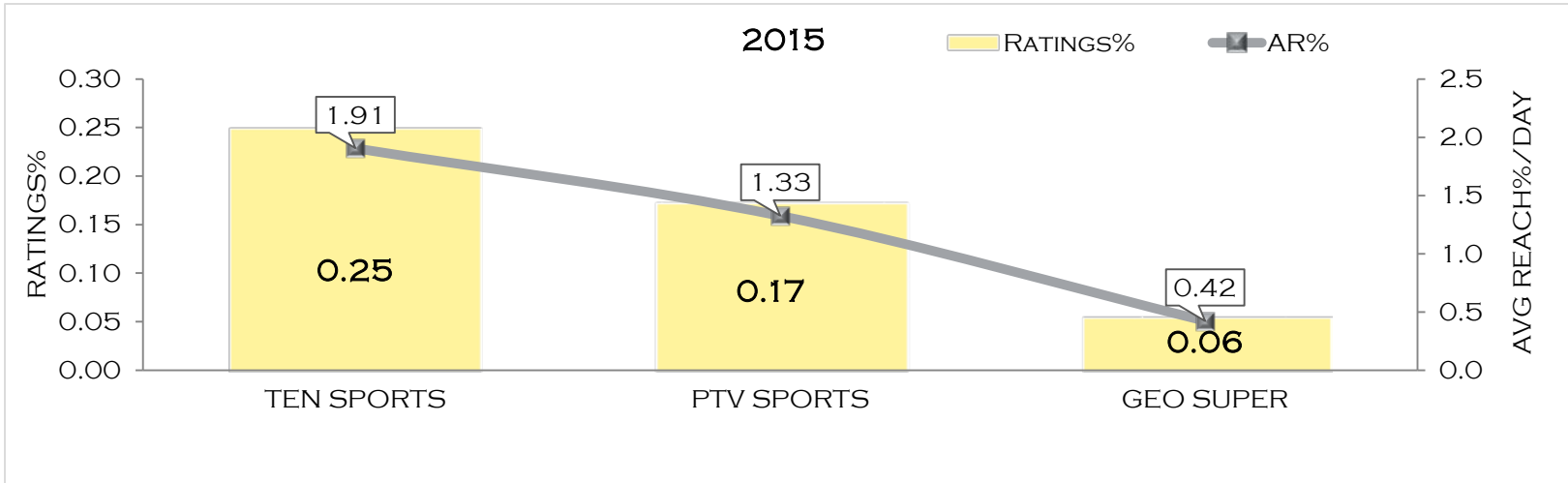
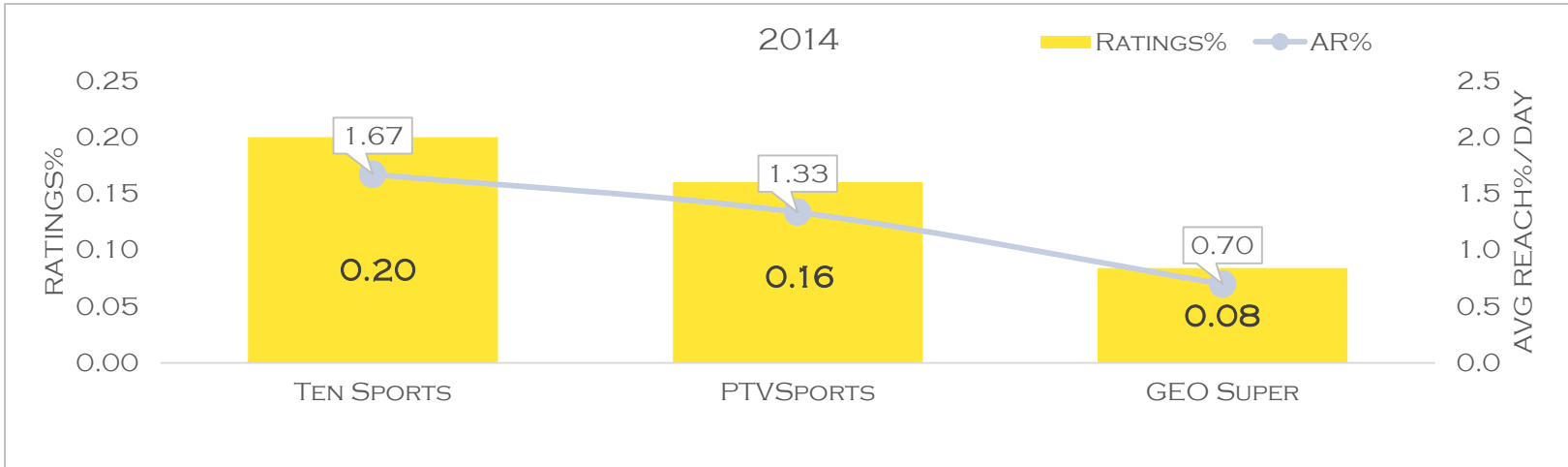
SPORTS CHANNELS

2014 vs. 2015 TOTAL IND



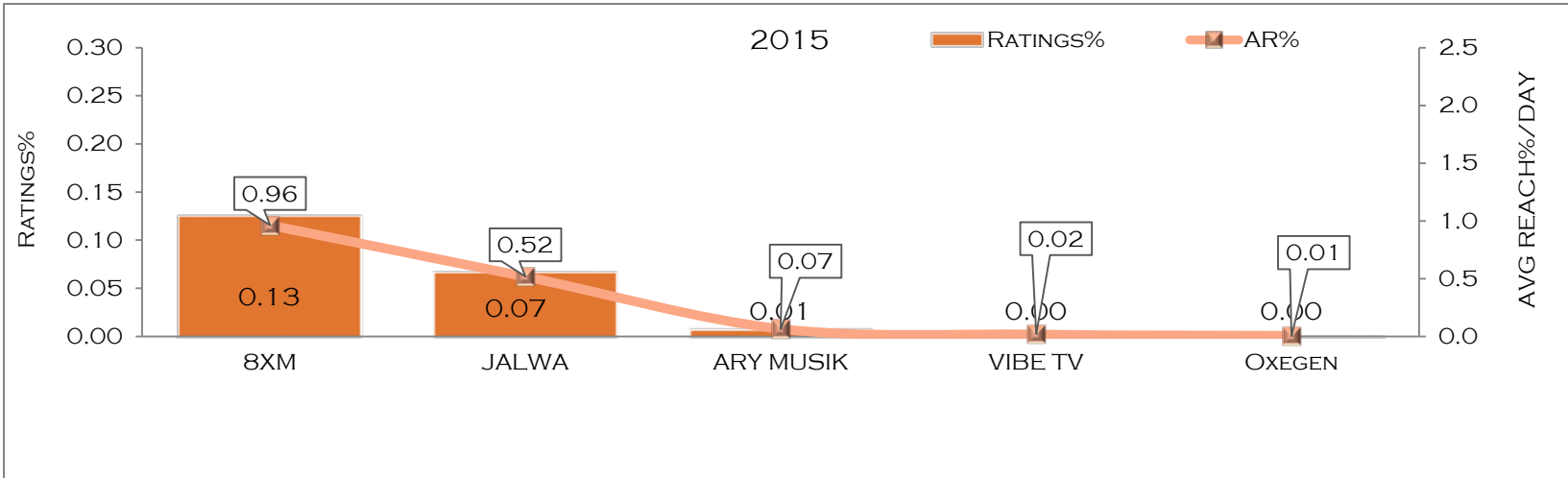
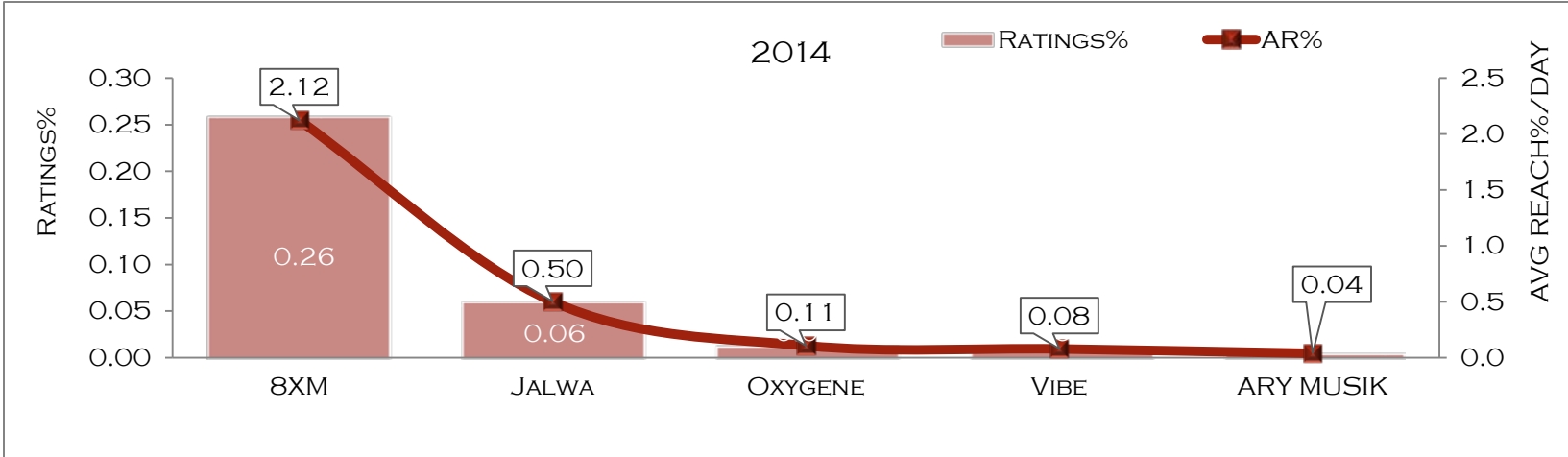
SPORTS CHANNELS

2014 vs. 2015 C&S IND



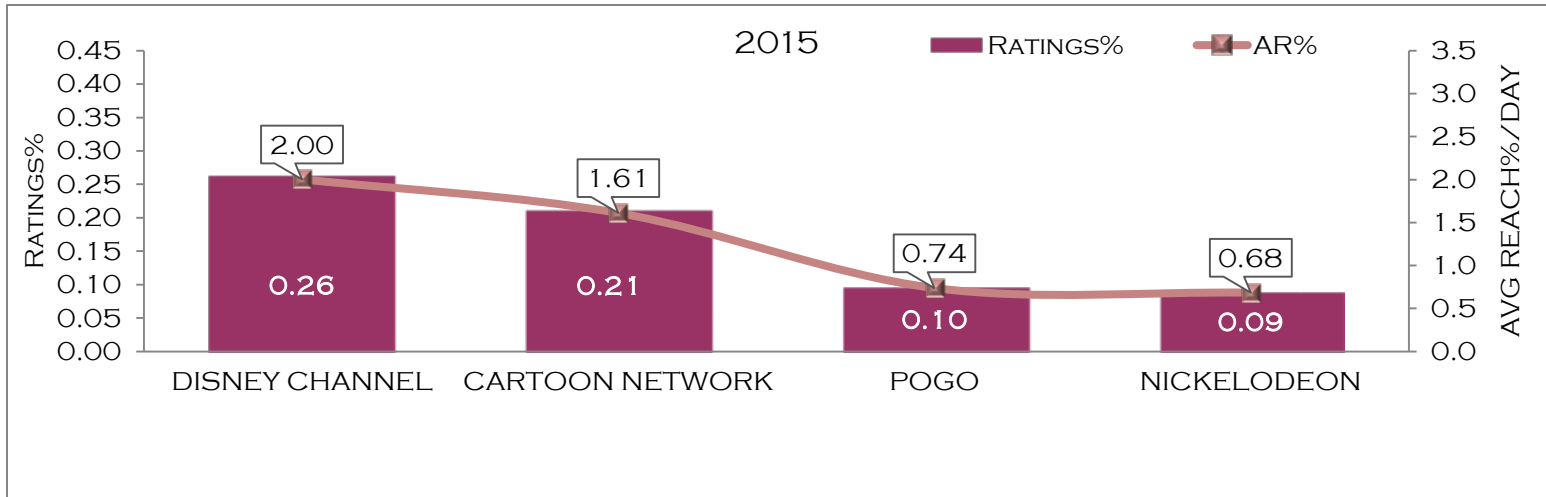
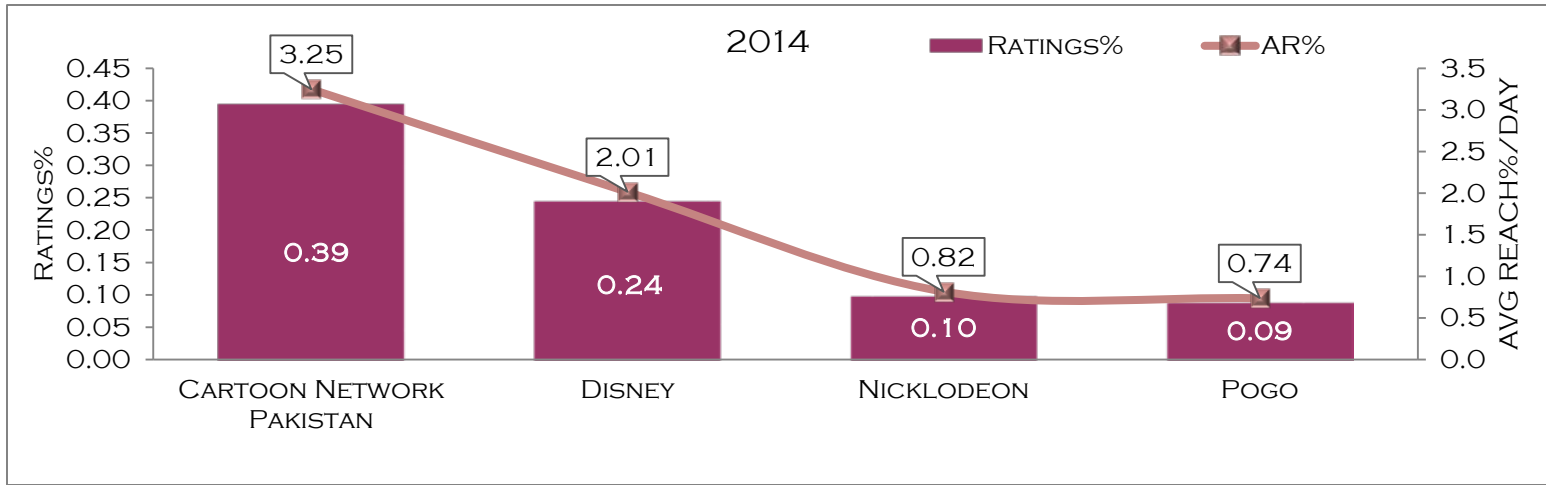
MUSIC CHANNELS

2014 vs. 2015 C&S



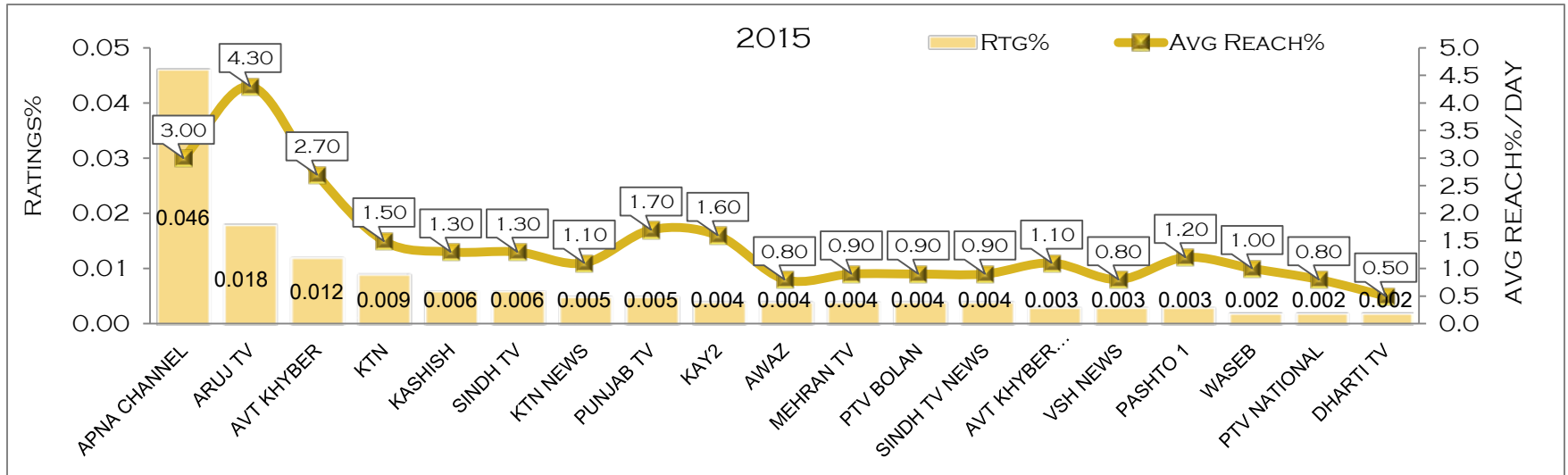
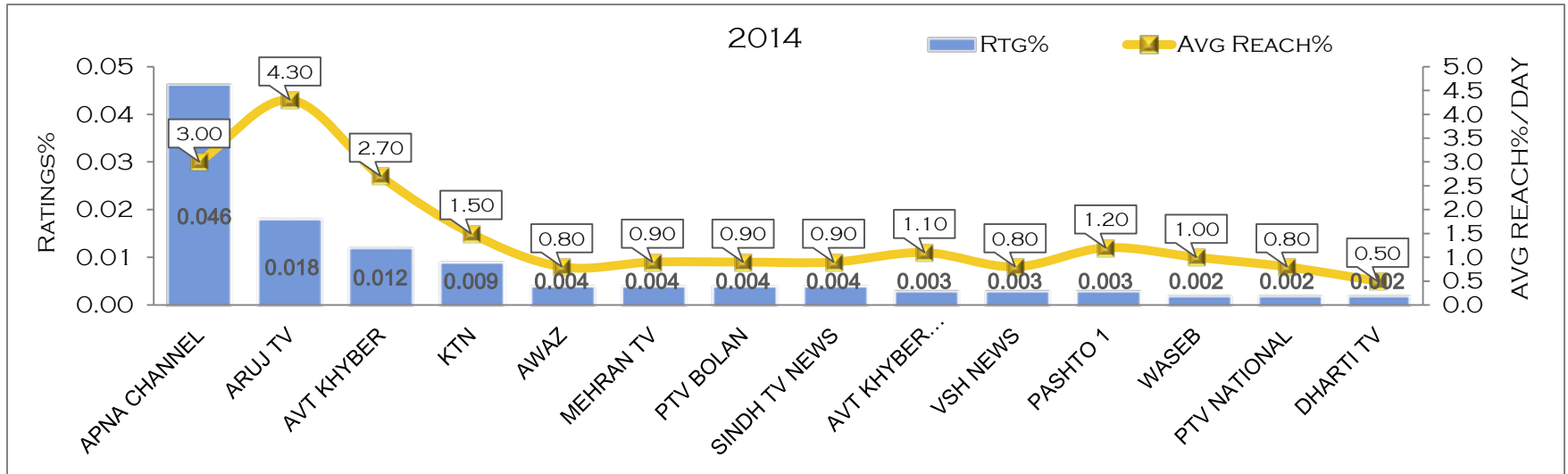
KIDS CHANNELS

2014 vs. 2015 C&S IND



REGIONAL CHANNELS

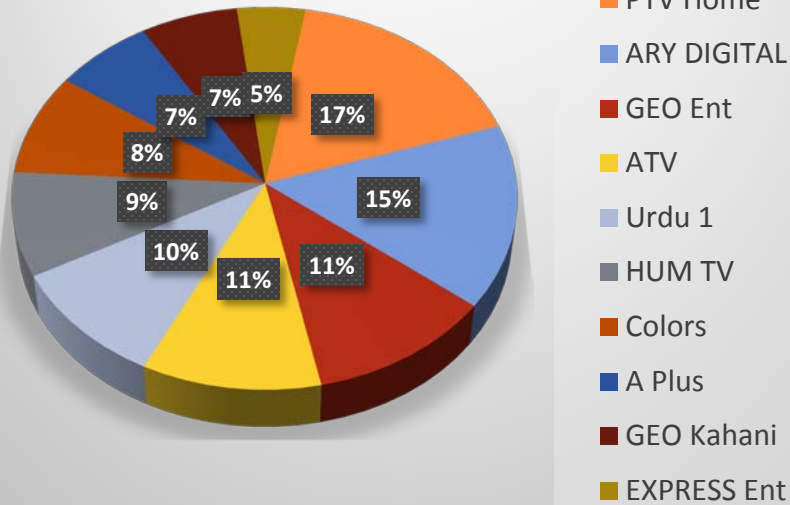
2014 vs. 2015 C&S IND



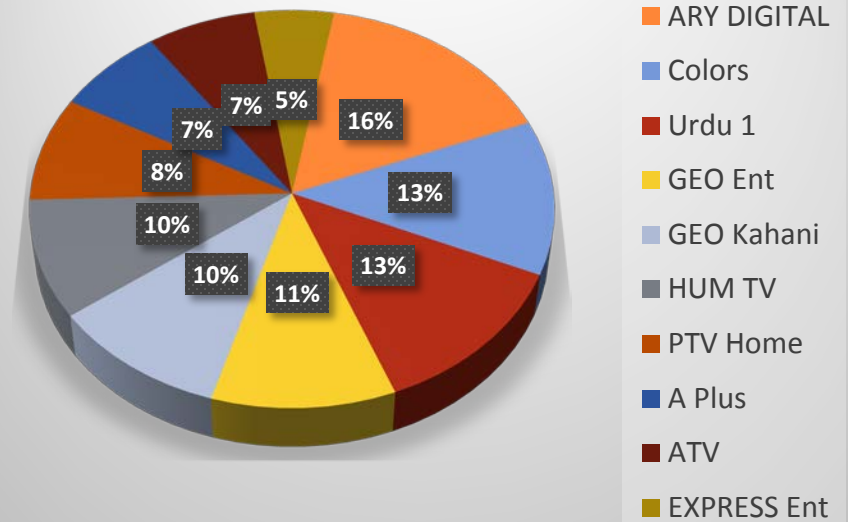
TOP 10 ENT CHANNELS' RELATIVE SHARE% 2014 vs. 2015

TOTAL IND

2014



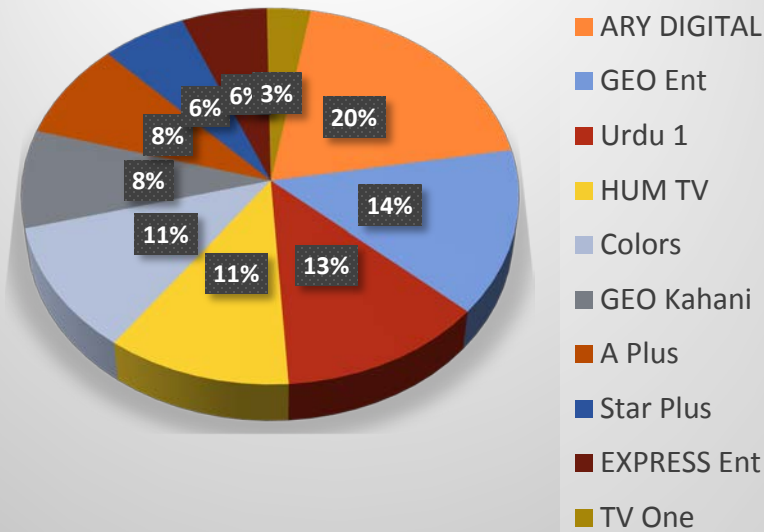
2015



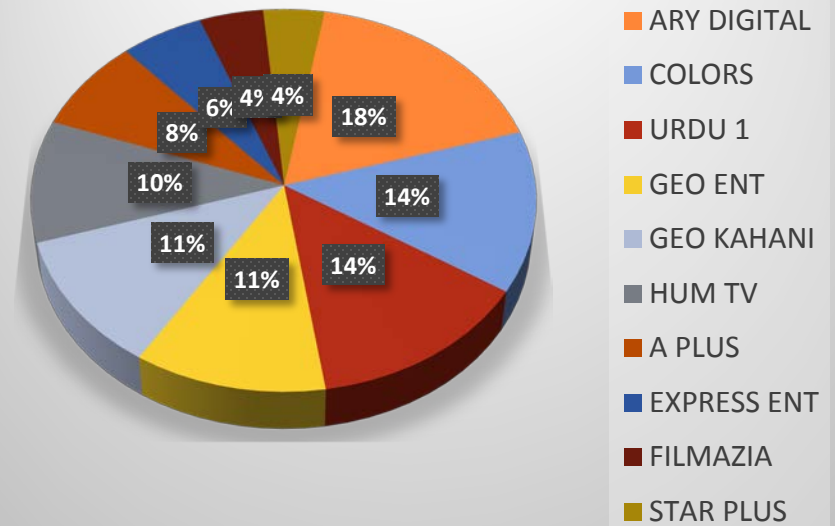
TOP 10 ENT CHANNELS RELATIVE SHARE%

2014 vs. 2015 C&S IND

2014



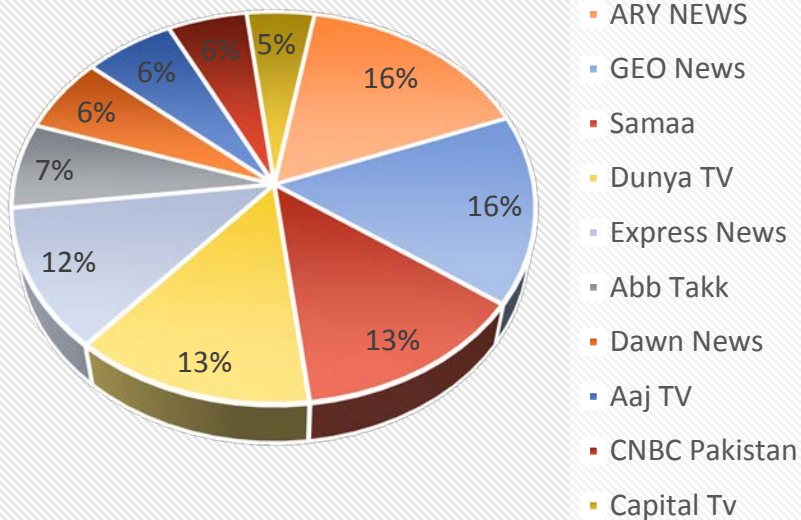
2015



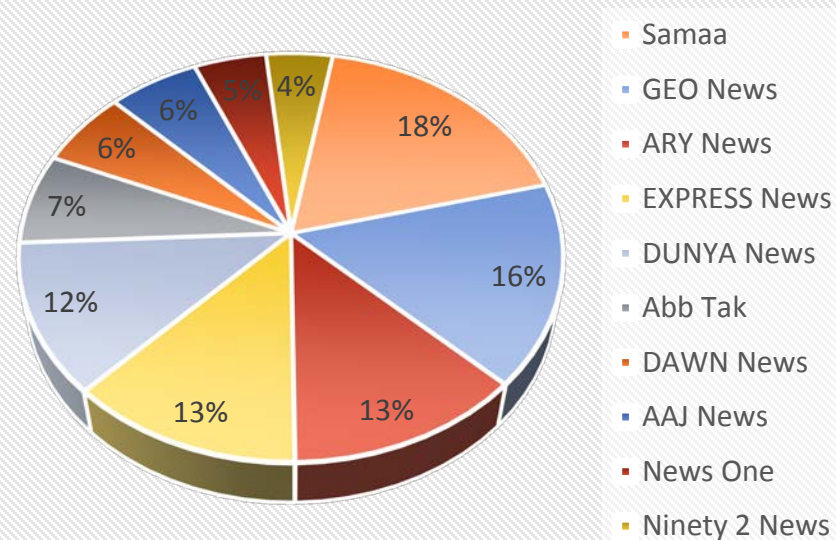
TOP 10 NEWS CHANNELS RELATIVE SHARE%

2014 vs. 2015 TOTAL IND

2014



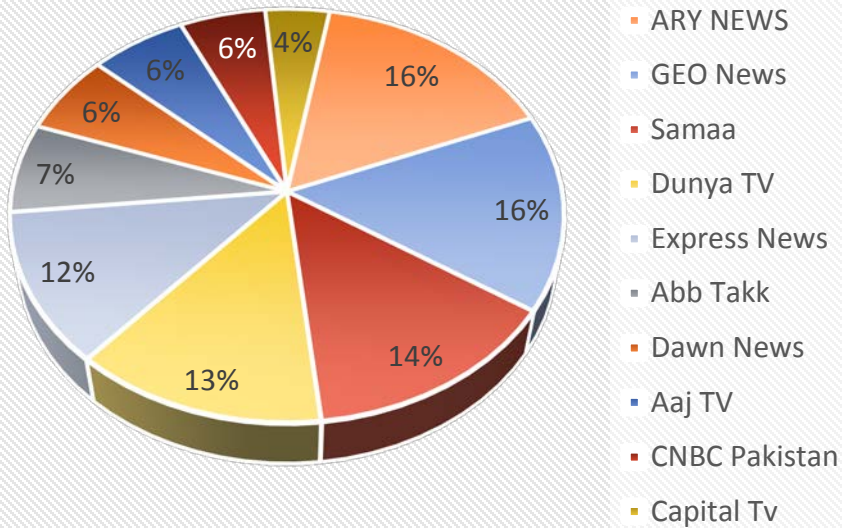
2015



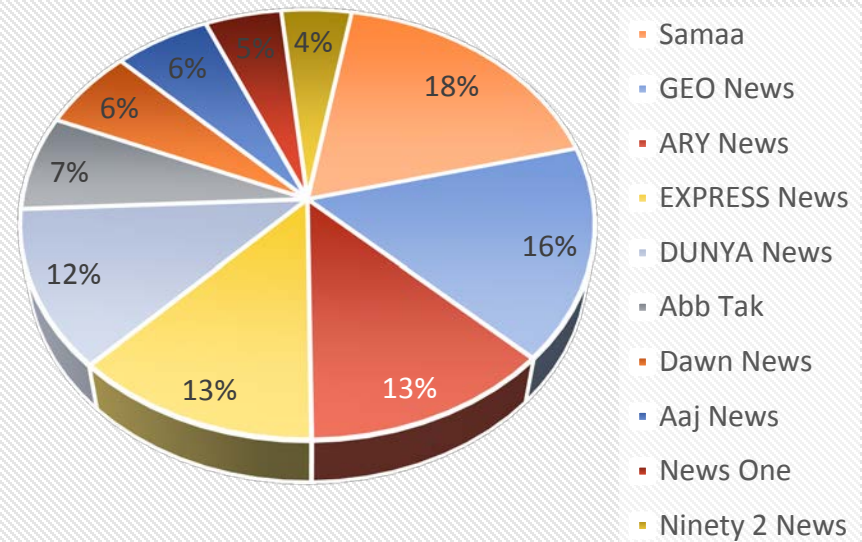
TOP 10 NEWS CHANNELS RELATIVE SHARE%

2014 vs. 2015 C&S IND

2014



2015



TOP 10 PROGRAMS

2015 C&S INDIVIDUAL



ARY DIGITAL's "Jeeto Pakistan" TOPS THE TOP 10 CHARTS FOR 2015 BY GETTING 12.3 RATINGS AND 28.7% MARKET SHARE%

Rank	Date	Day	Channel	Program Title	Ratings%	Ratings'000'	Market Share%
1	03.JUL.15	FRI	ARY DIGITAL	JEETO PAKISTAN	12.3	5276	28.7
2	10.MAR.15	TUE	ARY DIGITAL	CHUP RAHO	6.6	2832	18
3	17.JAN.15	SAT	URDU 1	SATH NIBHANA SATHIYA	5.8	2479	15.6
4	09.APR.15	THU	GEO KAHANI	KUMKUM BHAGYA	5.8	2470	16.8
5	28.FEB.15	SAT	URDU 1	YE HAIN MOHABBATEIN	5.2	2221	14.9
6	19.FEB.15	THU	URDU 1	DIYA AUR BATI HUM	5.1	2182	21.6
7	03.FEB.15	TUE	URDU 1	YEH RISHTA KIA KEHLATA HAI	4.9	2125	13.7
8	09.MAR.15	MON	GEO KAHANI	DOLI ARMANNO KI	4.7	2025	15.5
9	12.FEB.15	THU	ARY DIGITAL	MAIN BUSHRA	4.7	2021	11.6
10	04.MAR.15	WED	ARY DIGITAL	KHATA	4.6	1967	12.3

TOP 10 PROGRAMS

2015 : ALL INDIVIDUAL

RANK	DATE	DAY	CHANNEL	PROGRAM TITLE	RATINGS%	RATINGS'00 0'	MARKET SHARE%
1	03.07.2015	FRI	ARY DIGITAL	JEETO PAKISTAN	11.5	5276	34
2	10.03.2015	TUE	ARY DIGITAL	CHUP RAHO	6.2	2832	19.8
3	17.01.2015	SAT	URDU 1	SATH NIBHANA SATHIYA	5.6	2578	26.6
4	09.04.2015	THU	GEO KAHANI	KUMKUM BHAGYA	5.4	2479	18.4
5	28.02.2015	SAT	URDU 1	YE HAIN MOHABBATEIN	5.4	2470	18.5
6	19.02.2015	THU	URDU 1	DIYA AUR BATI HUM	4.8	2221	15.2
7	03.02.2015	TUE	URDU 1	YEH RISHTA KIA KEHLATA HAI	4.4	2025	17.1
8	09.03.2015	MON	GEO KAHANI	DOLI ARMANNO KI	4.4	2021	13.7
9	12.02.2015	THU	ARY DIGITAL	MAIN BUSHRA	4.3	1967	13.3
10	04.03.2015	WED	ARY DIGITAL	KHATA	4.2	1939	13.1

ARY DIGITAL's "Jeeto Pakistan" ALSO LEADING ON C&S IND

TOP 10 TALK SHOWS

2015 C&S IND

GEO NEWS' " NAYA PAKISTAN " LEADING THE TOP 10 TALK SHOWS CHARTS WITH 2.8 RATINGS FOLLOWED BY POWERPALY

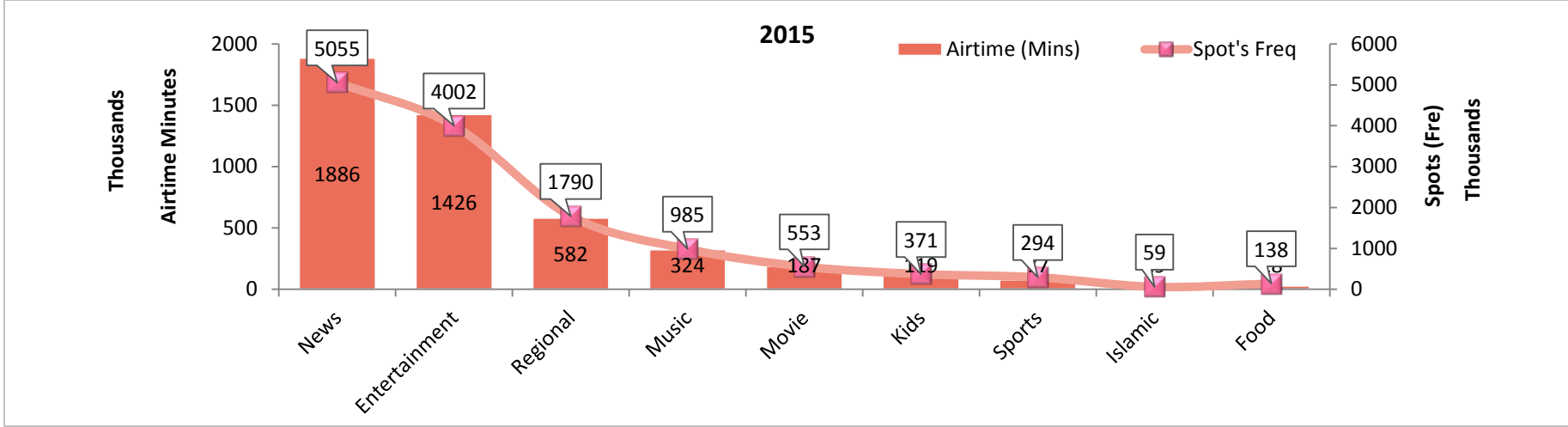
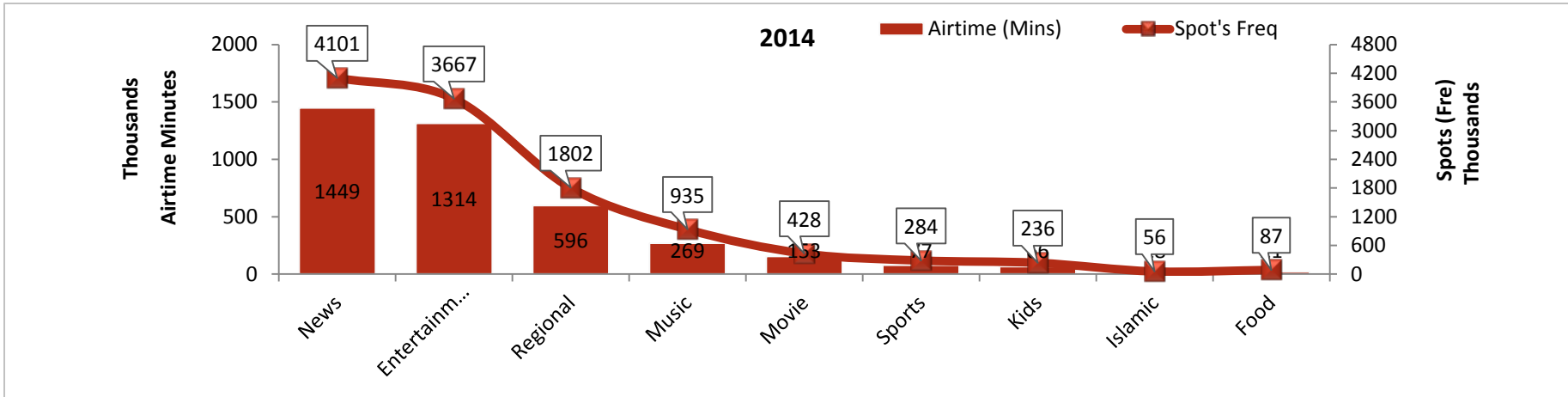
Rank	Date	Day	Channel	Program Title	Ratings%	Ratings'000'	Market Share%
1	17.JUL.15	FRI	GEO NEWS	NAYA PAKISTAN	2.8	1202	7.8
2	29.MAR.15	SUN	ARY NEWS	POWER PLAY	2.4	1023	11.8
3	19.MAR.15	THURS	ARY NEWS	ANDAR KI BAAT	2.4	1022	10.6
4	12.MAR.15	THURS	SAMAA	AWAAZ	1.7	740	7
5	23.MAR.15	MON	ARY NEWS	KHARA SACH	1.7	721	5.6
6	11.MAR.15	WED	GEO NEWS	AAJ SHAHZAIB KHANZADA KAY SAATH	1.6	697	7
7	26.OCT.15	MON	GEO NEWS	REPORT CARD	1.5	662	5.4
8	17.JUL.15	FRI	EXPRESS NEWS	MAIN AUR MOLANA	1.4	598	4.6
9	29.Nov.15	SUN	SAMAA	NEWS BEAT	1.3	575	4.8
10	11.MAR.15	WED	EXPRESS NEWS	KAL TAK	1.3	570	4.7

INDUSTRY COMMERCIAL AIRTIME ANALYSIS 2014 VS. 2015

- INDUSTRY AIRTIME MINUTES BY GENRE
- TOP 10 PRODUCT CATEGORIES
- TOP 10 ADVERTISERS
- TOP 10 BRANDS
- TOP 10 ENT CHANNELS (IN TERMS OF AIRTIME MINUTES)
- TOP 10 NEWS CHANNEL (IN TERMS OF AIRTIME MINUTES)

INDUSTRY COMMERCIAL AIRTIME BY GENRE

JAN TO DEC 2014

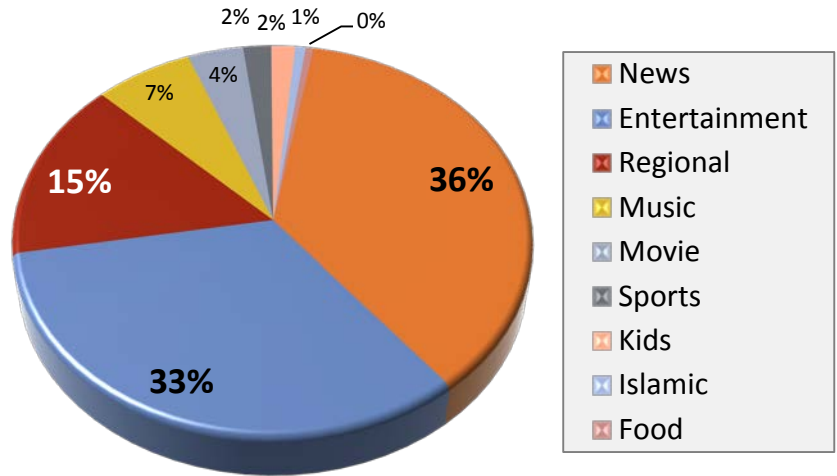


News genre leading the industry in both 2014 and 2015 followed by entertainment genre

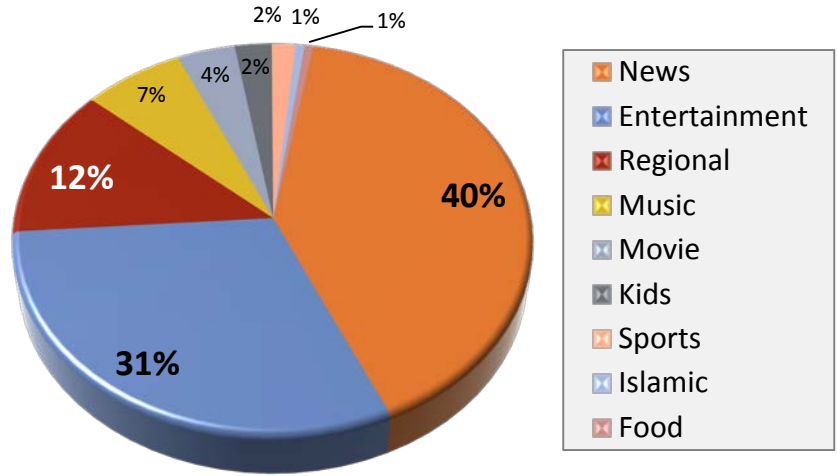
INDUSTRY AIRTIME SHARE% BY GENRE

2014 vs. 2015

Genre-wise Share% In Airtime 2014



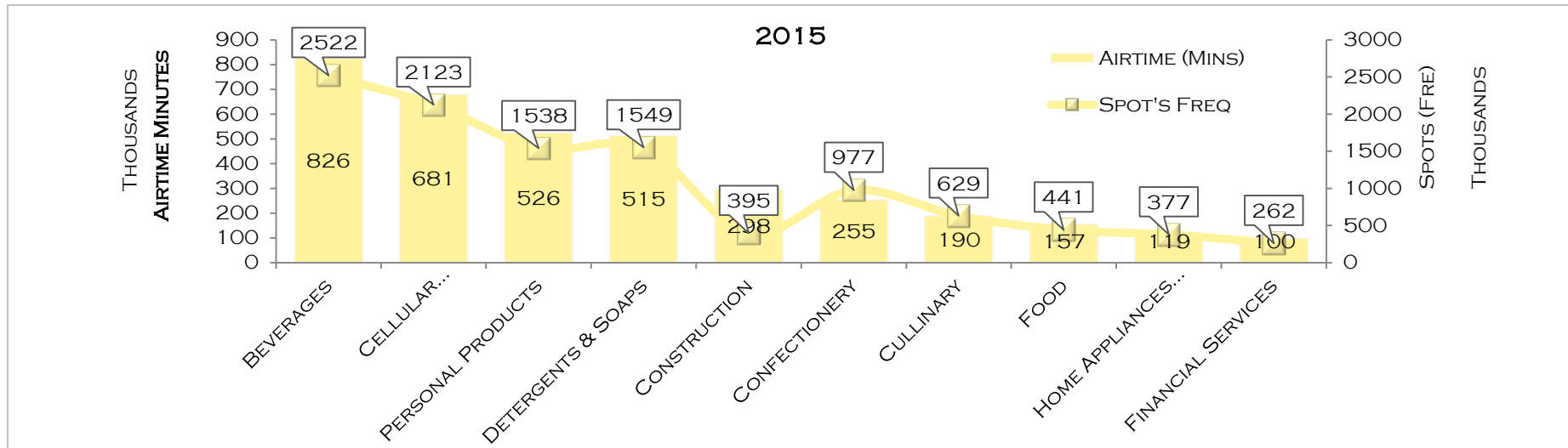
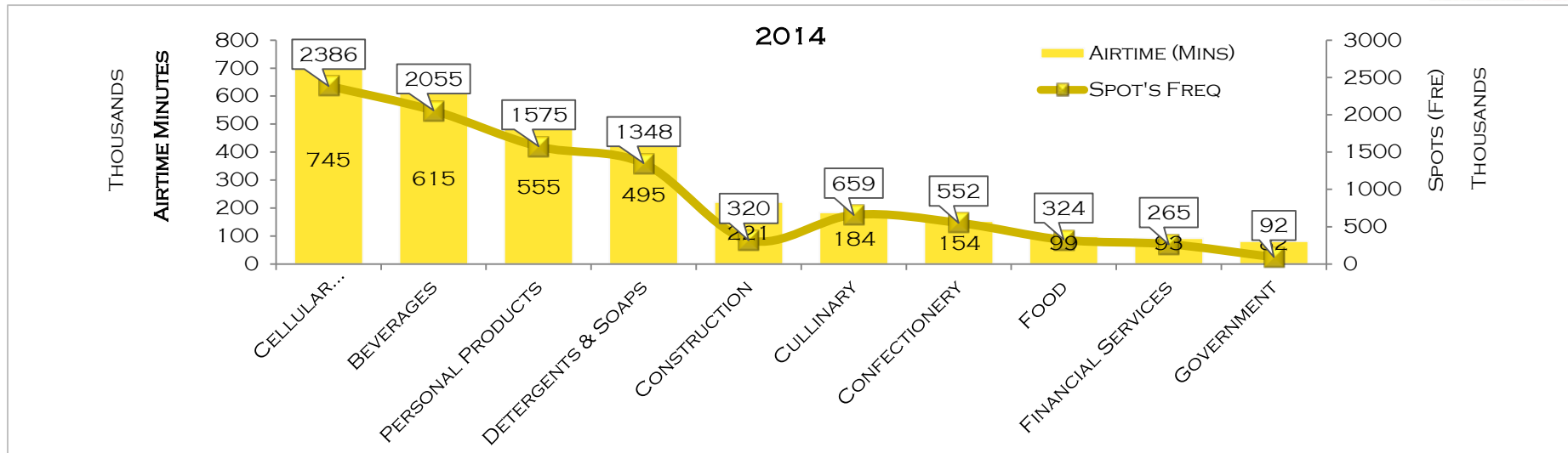
Genre-wise Share% In Airtime 2015



News genre has the highest share in Industry Commercial Airtime in 2014 and 2015.

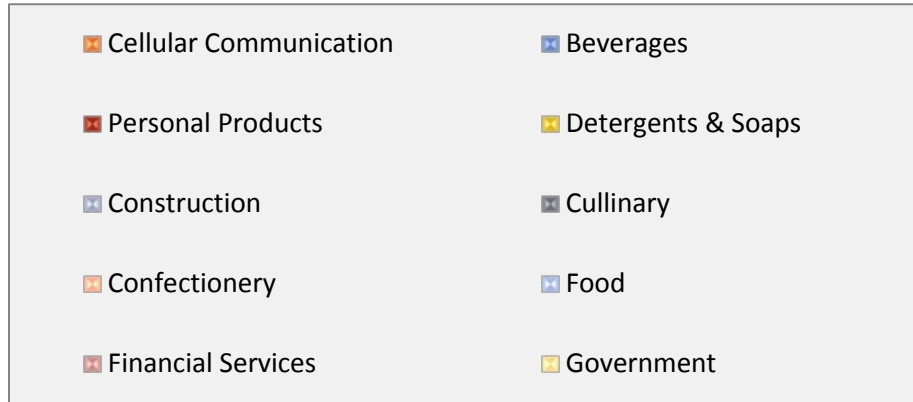
TOP 10 CATEGORIES

2014 vs. 2015

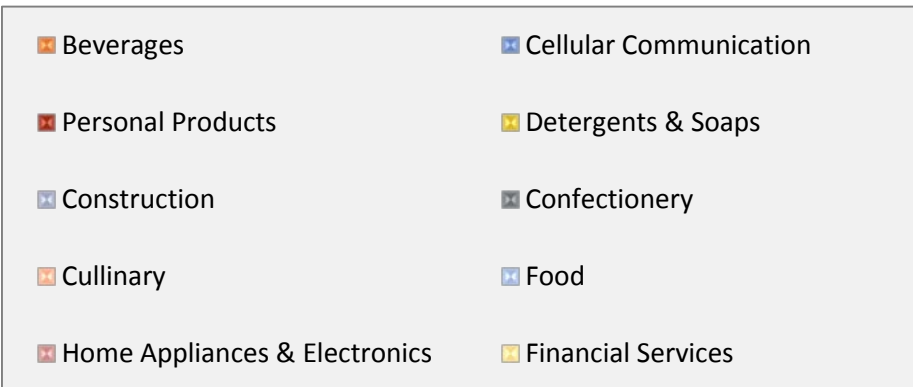
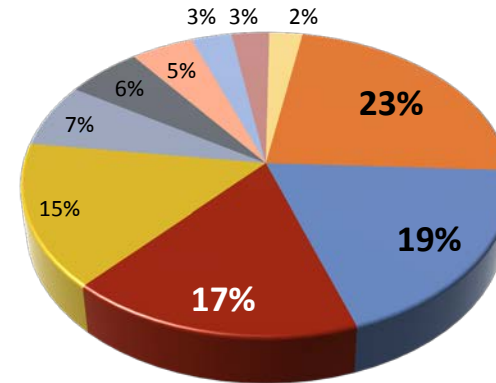


TOP 10 CATEGORIES AIRTIME SHARE%

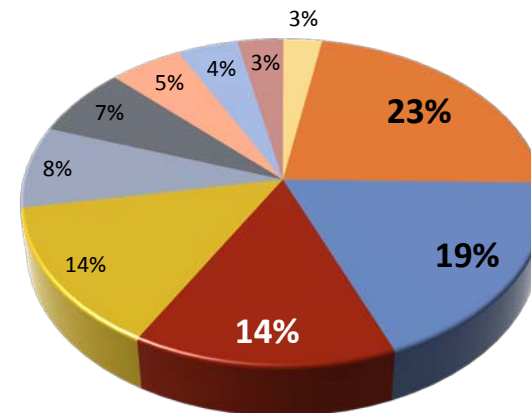
2014 vs. 2015



Relative Share% In Airtime 2014



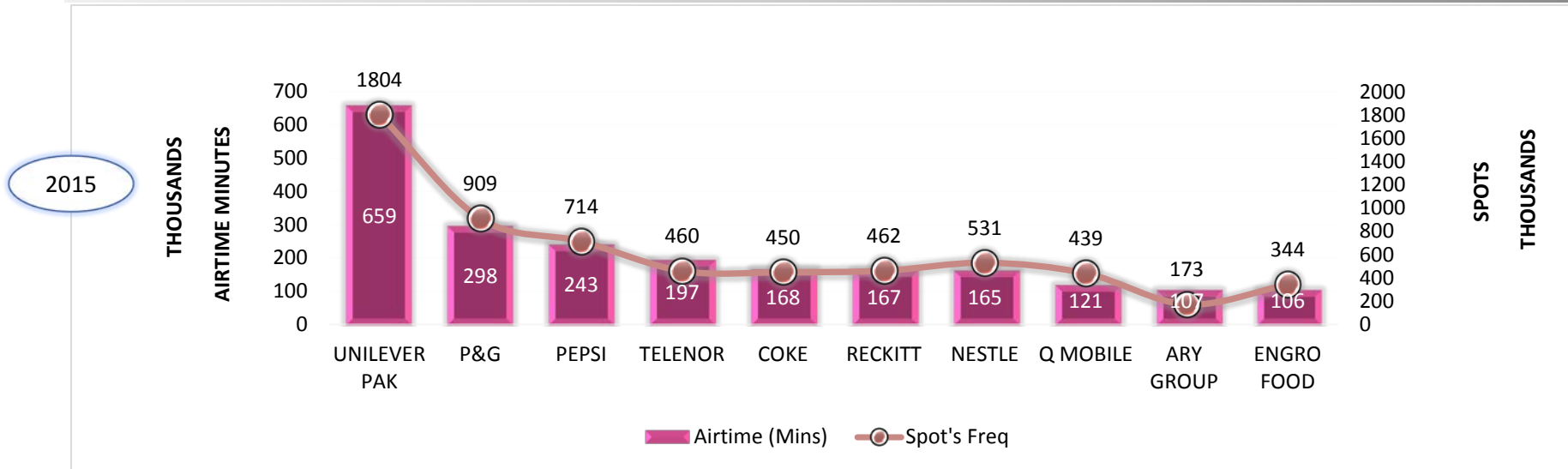
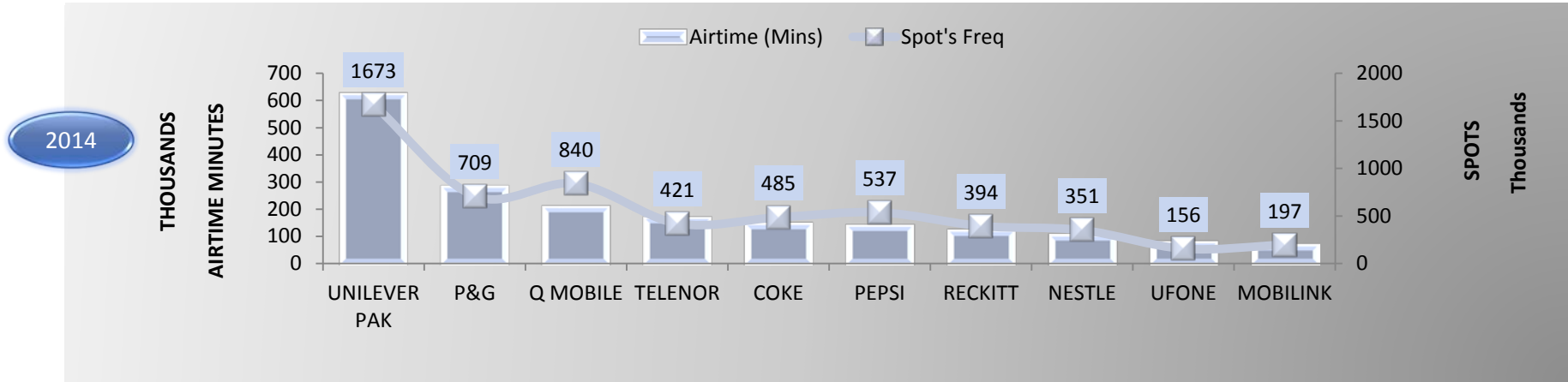
Relative Share% In Airtime 2015



TOP 10 ADVERTISERS CAT

2014 vs. 2015

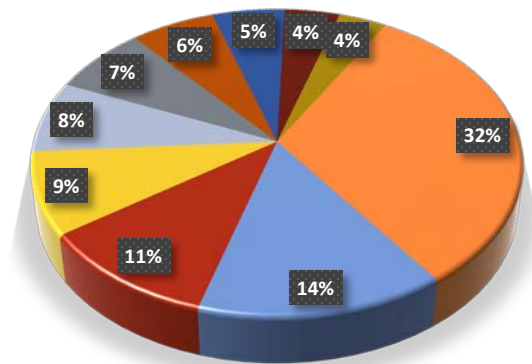
UNILEVER LEADING THE TOP-10 ADVERTISERS CHARTS FOR THE YEAR 2014 AND 2015 FOLLOWED BY P&G .



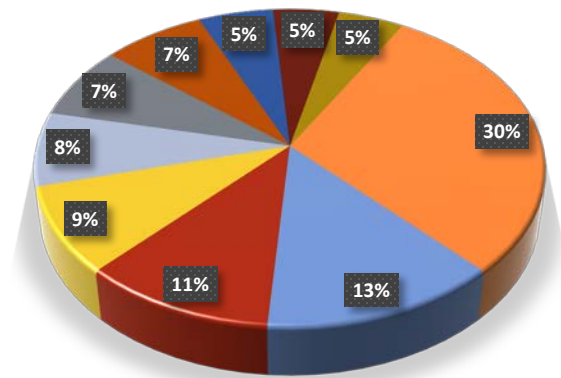
TOP 10 ADVERTISER CAT SHARE%

2014 VS. 2015

Relative Share% In Airtime 2014

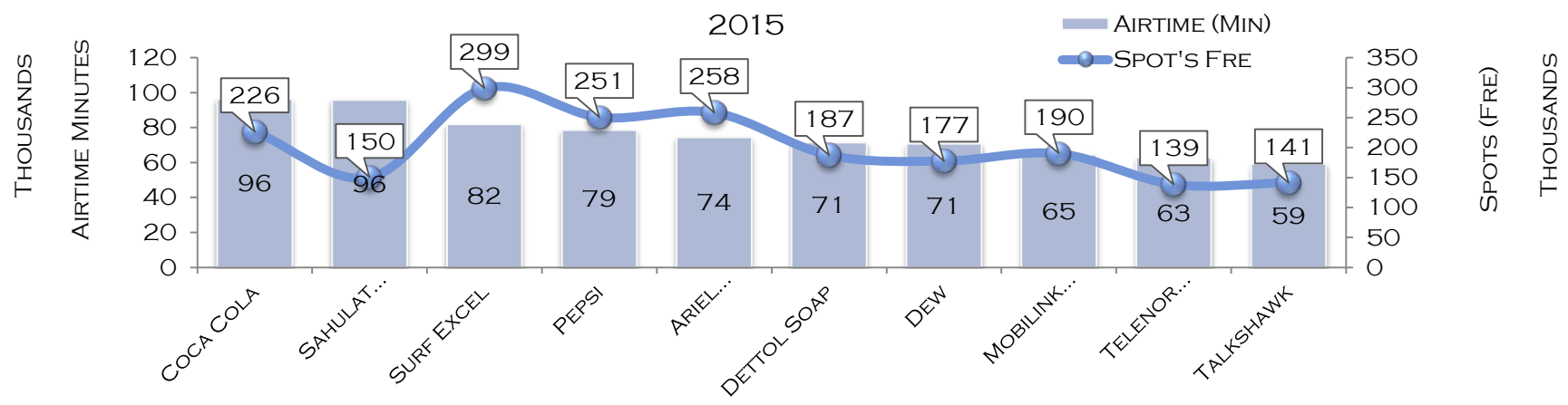
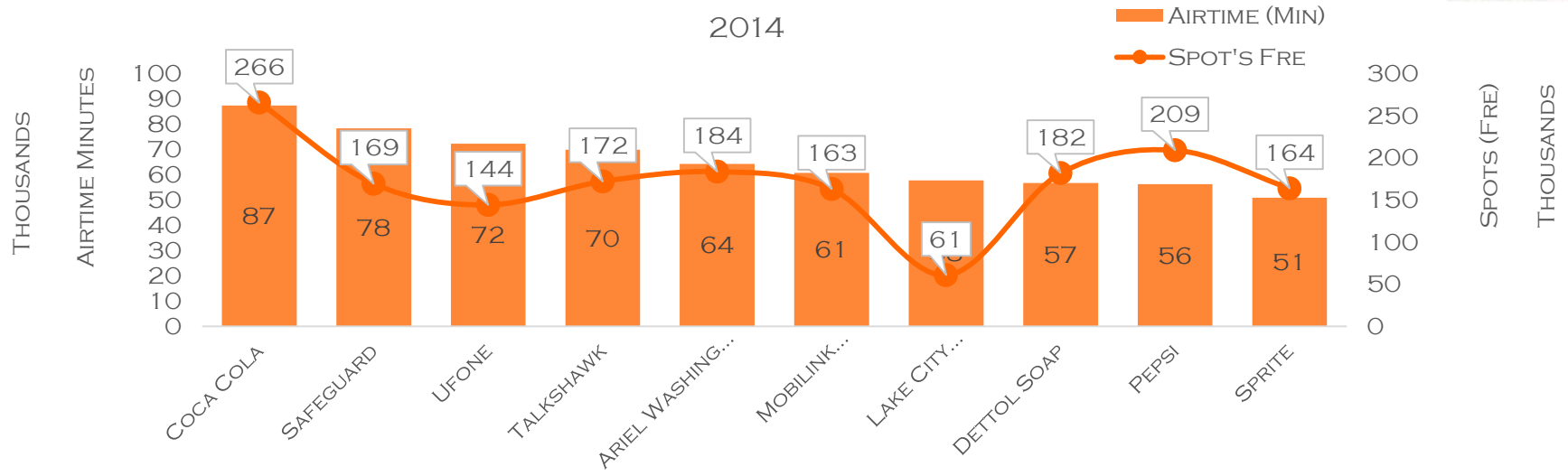


Relative Share% In Airtime 2015



TOP 10 BRANDS

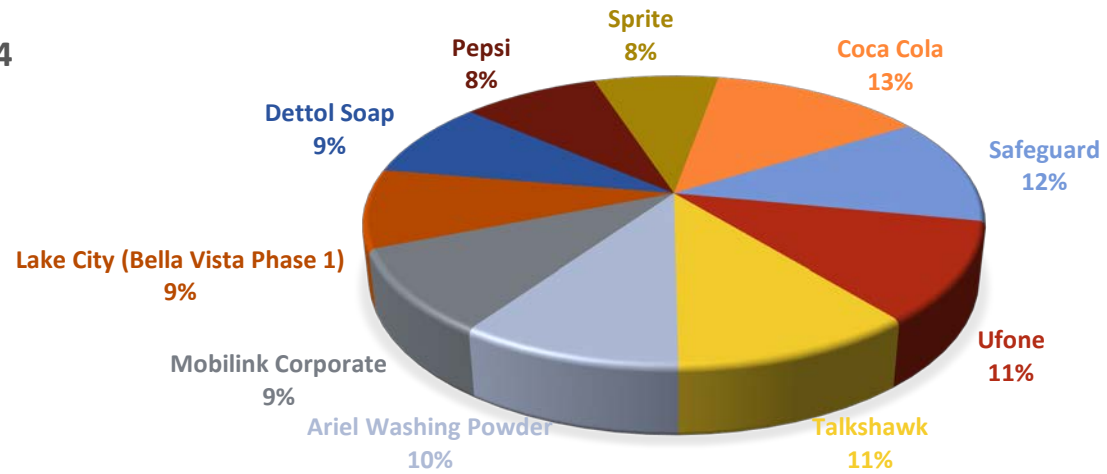
2014 vs. 2015



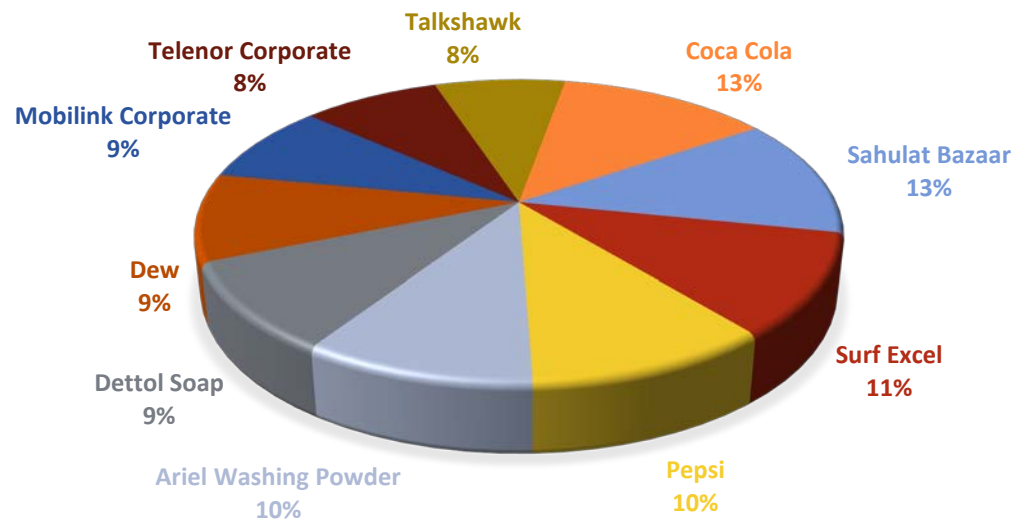
TOP 10 BRANDS CAT SHARE%

2014 VS. 2015

RELATIVE SHARE% IN AIRTIME 2014

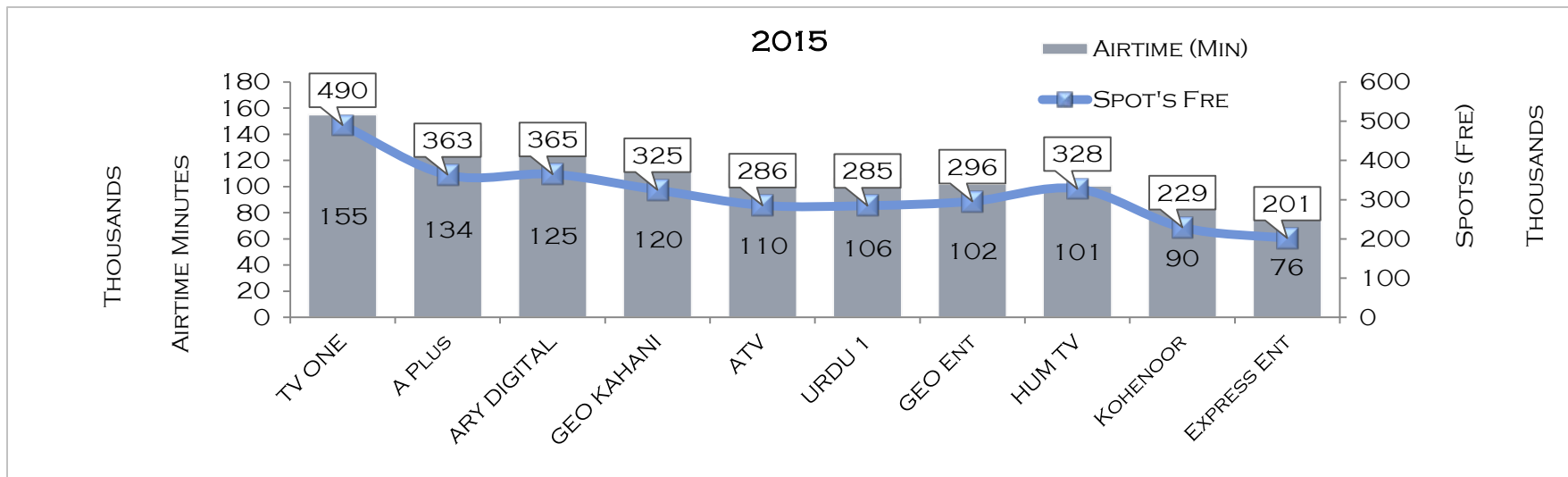
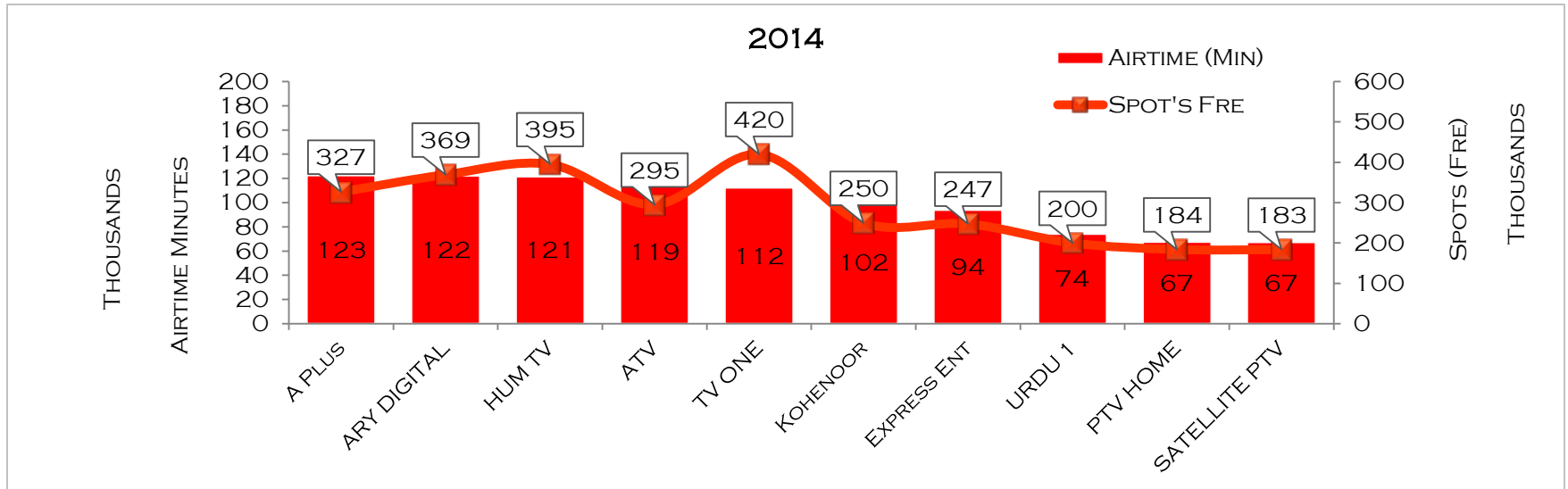


RELATIVE SHARE% IN AIRTIME 2015



TOP 10 ENT CHANNELS CAT

2014 vs. 2015

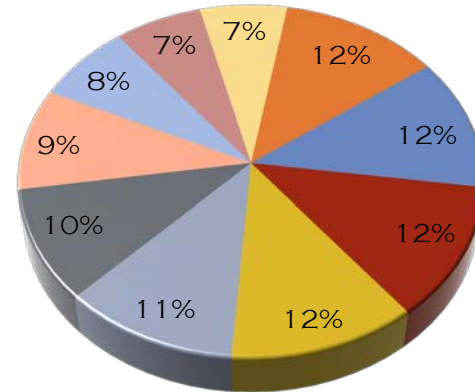


TOP 10 ENT CHANNELS CAT SHARE%

2014 vs. 2015

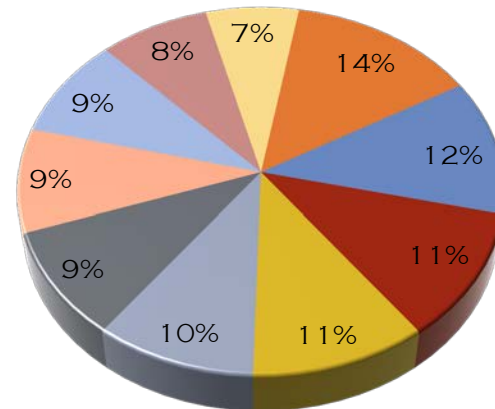
- A PLUS
- HUM TV
- TV ONE
- EXPRESS ENT
- PTV HOME
- ARY DIGITAL
- ATV
- KOHENOOR
- URDU 1
- SATELLITE PTV

RELATIVE SHARE% IN AIRTIME 2014



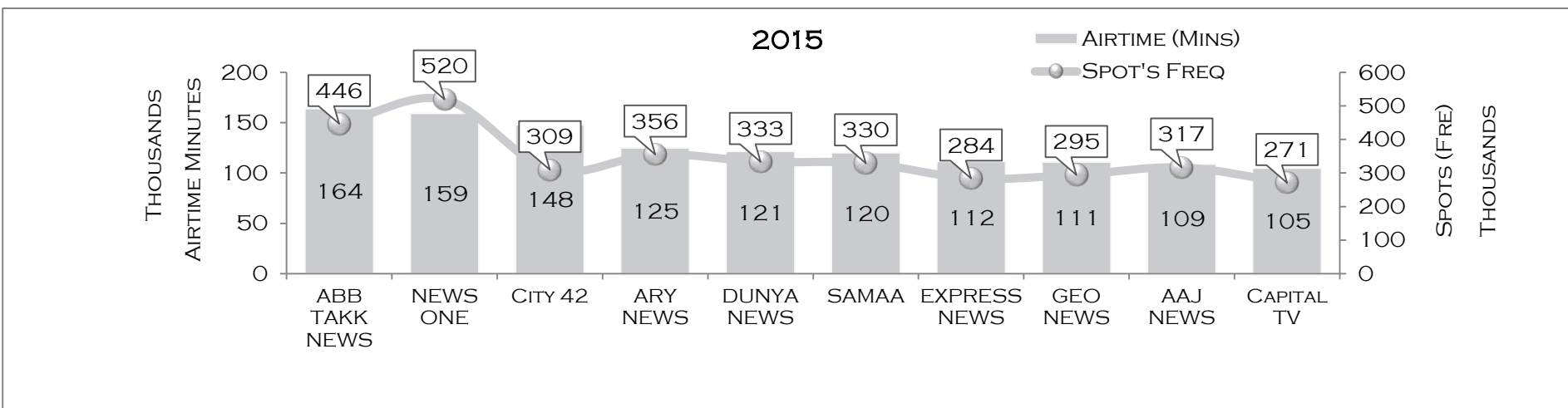
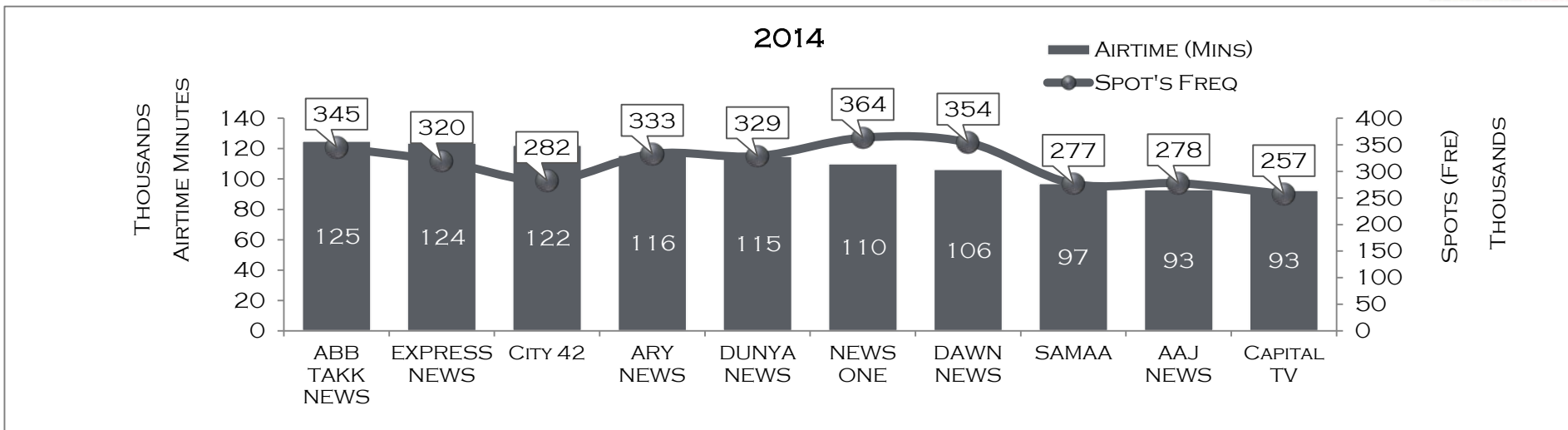
- TV ONE
- ARY DIGITAL
- ATV
- GEO ENTERTAINMENT
- KOHENOOR
- A PLUS
- GEO KAHANI
- URDU 1
- HUM TV
- EXPRESS ENT

RELATIVE SHARE% IN AIRTIME 2015



TOP 10 NEWS CHANNELS

2014 vs. 2015

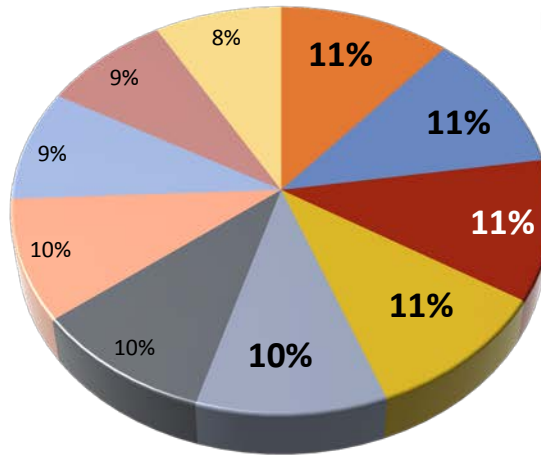


Amongst news channels ABB TAK stays on top in both 2014 and 2015.

TOP 10 NEWS CHANNELS CAT SAHRE%

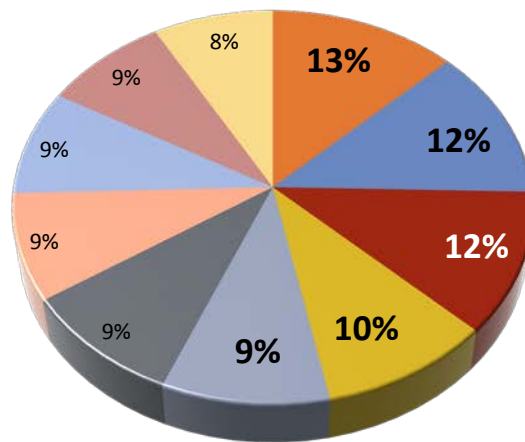
2014 VS. 2015

Relative Share% In Airtime 2014



- ABB TAKK NEWS
- EXPRESS NEWS
- City 42
- ARY NEWS
- DUNYA NEWS
- NEWS ONE
- DAWN NEWS
- SAMAA
- AAJ NEWS
- Capital TV

Relative Share% In Airtime 2015



- ABB TAKK NEWS
- NEWS ONE
- City 42
- ARY NEWS
- DUNYA NEWS
- SAMAA
- EXPRESS NEWS
- GEO NEWS
- AAJ NEWS
- Capital TV

Thank You 😊