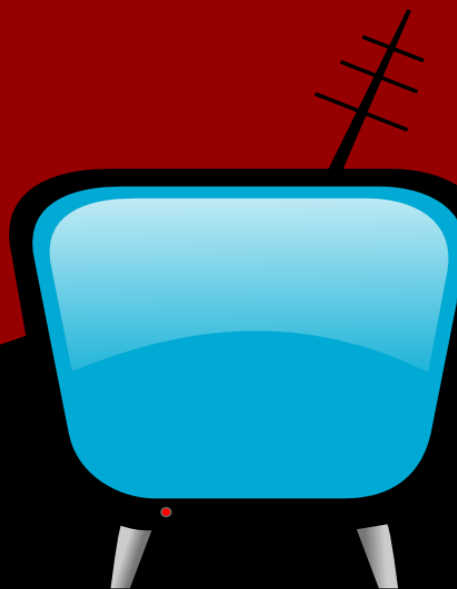


TV VIEWERSHIP OVERVIEW

JAN - DEC 2010



REGION PAKISTAN URBAN

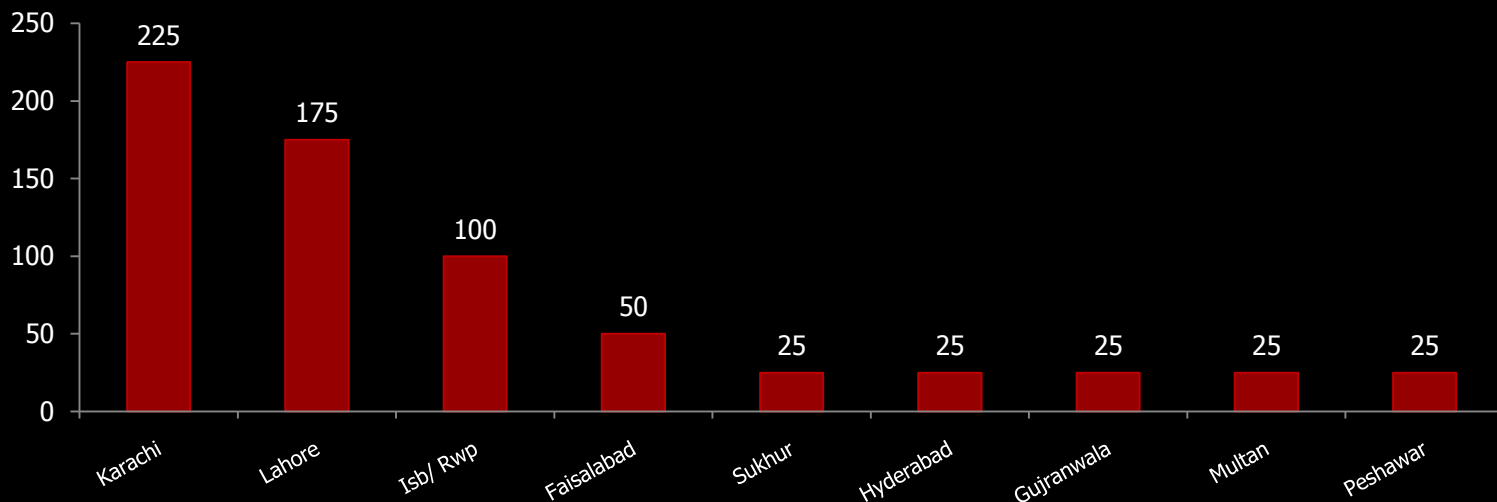
TA TOTAL / C&S IND

TIME BAND 06:00 - 00:00

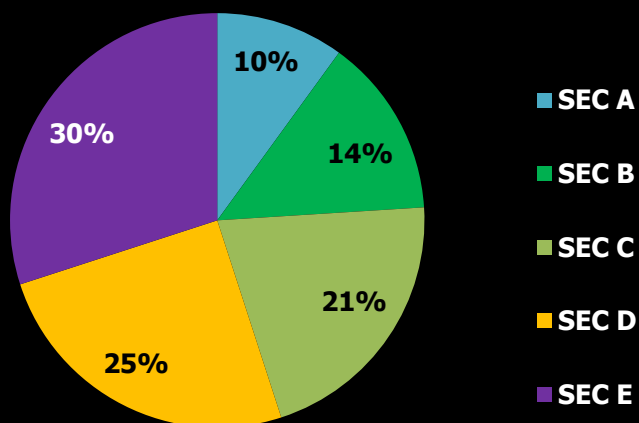
Pakistan Panel Composition

Total Panel Size - 675 Households

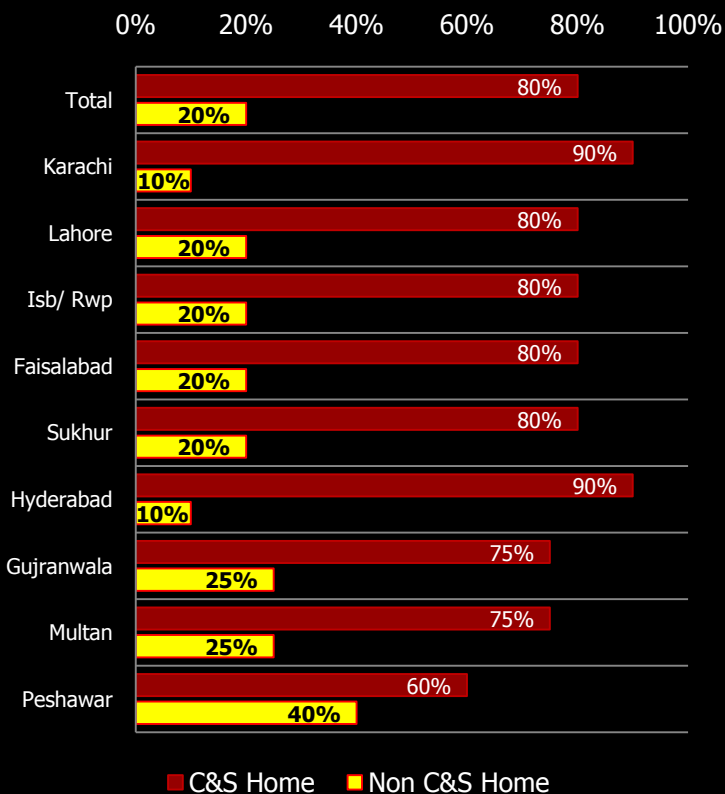
City Wise Break Up



SEC Break Up



C&S/ Non C&S Break Up



Broadcasting Environment - Basic Facts

In Top 08 Urban Cities:

Total Household - 5.7million ---> 37.9 million individuals

Total TV Households - 4.9 million ---> 32.6 million individuals

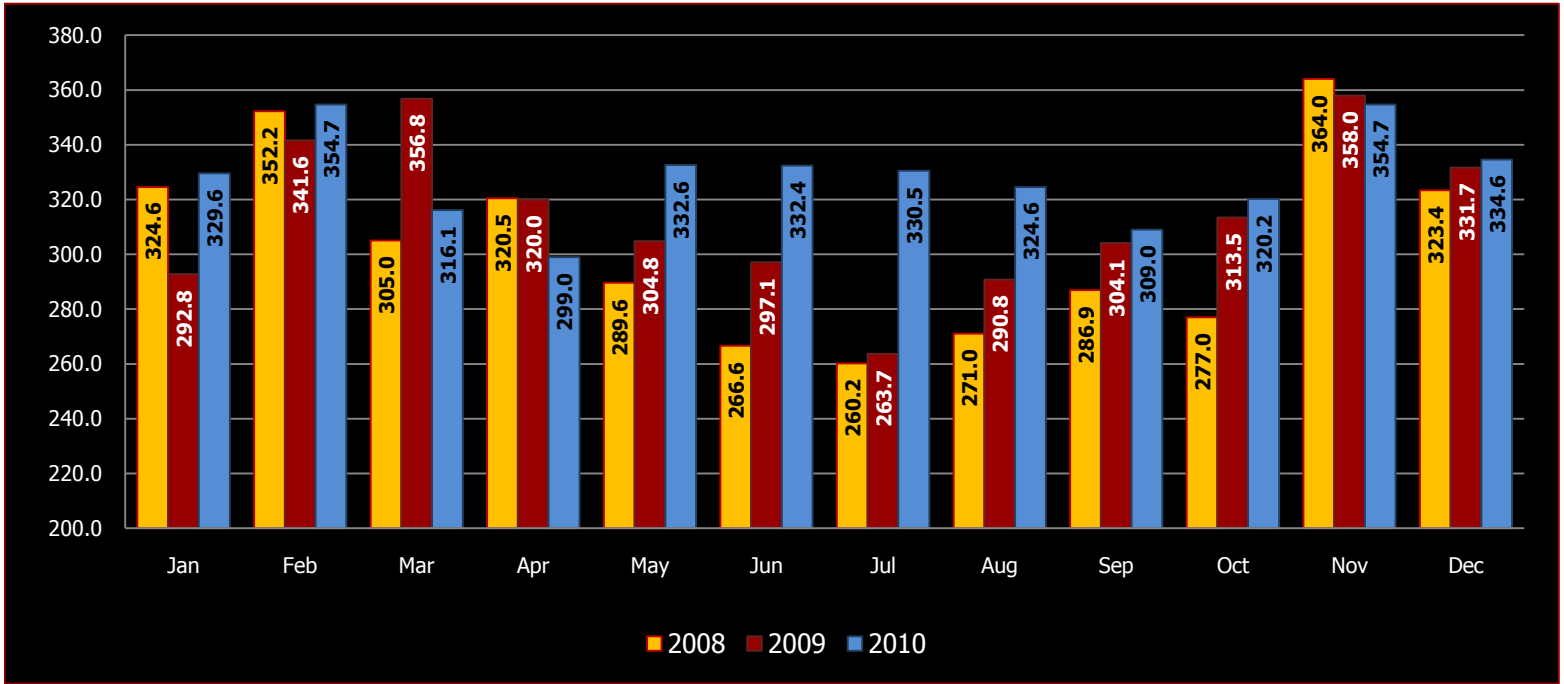
Total Cable Penetration - 4 million ---> 28.2 million individuals

Total Number of Local Channels - 81

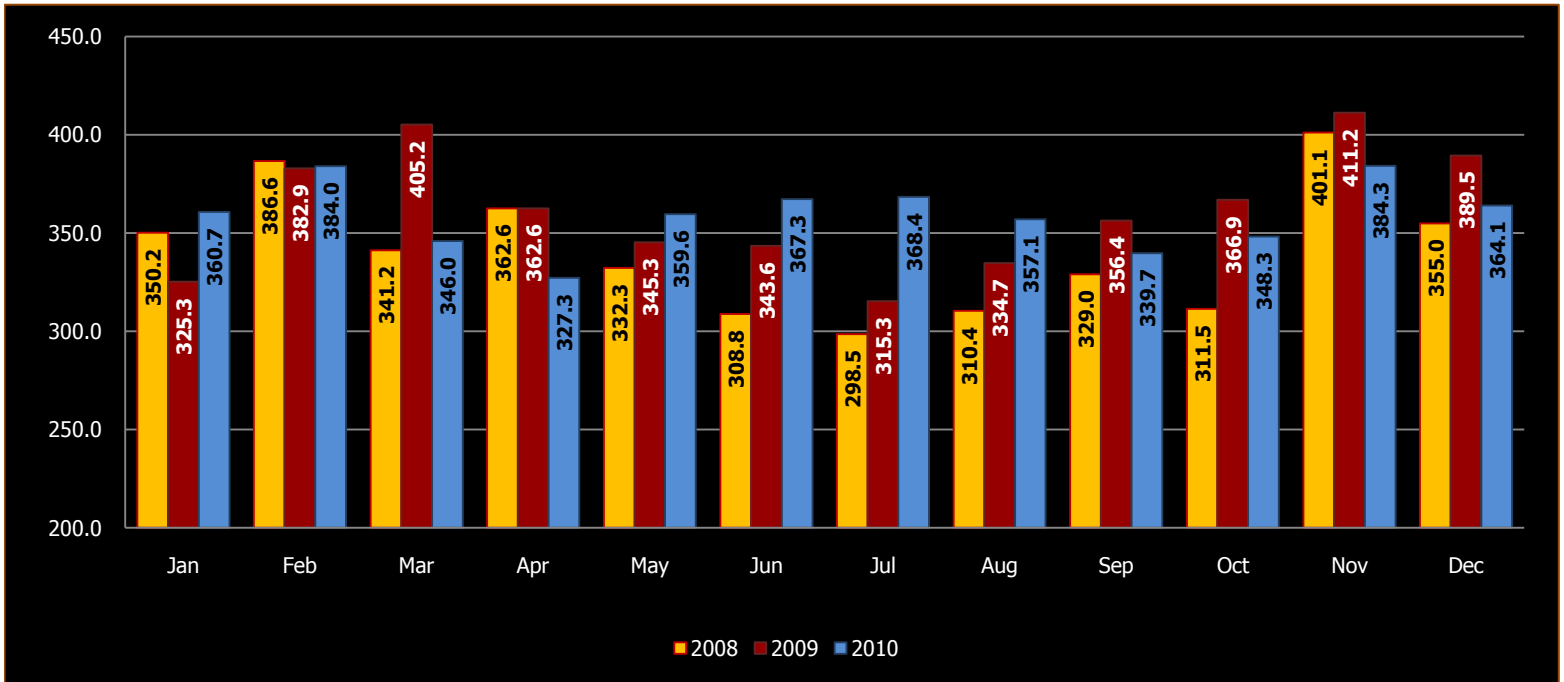
News	Entertainment	Sports	Children	Music	
Geo News ARY News Samaa Dunya TV Express News Waqt TV Dawn News News1 Metro One Business Plus Express 24/7 Aaj TV CNBC PTV News Din News Channel 5 Royal News KTN News APNA News Vash News Sindh News Khyber News City 42 Indus News	ARY Digital Hum TV Geo Ent Indus Vision A Plus* AKS * TV One PTV Home Alite * Sohni Dharti* Dharti Vibe Koh-e-Noor* AXN ATV PTV National	Geo Super Tensports	Cartoon Net Nickelodeon	Oxygene Aag Play ARY Music GKA Boom MTV Pakistan Oye K2	
Regional	Religious	Food	Movies	Fashion	Informational
Rohi TV KTN Punjab TV APNA Raavi Mehran Sindh TV PTV Bolan Waseb TV AVT Khyber Kook Kashish Awaz	Madni ARY QTV Haq TV	Zaiqa* Masala ARY Zauq	HBO Filmax Filmazia Starlite Silver Screen Film World*	Style 360	Value TV Health TV*

Usage in Minutes - Household

Total - Time Slot: 06:00 - 00:00



C&S - Time Slot: 06:00 - 00:00

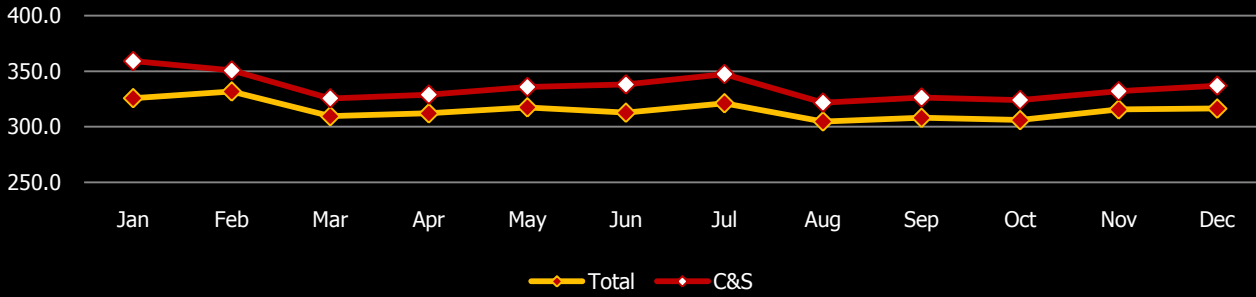


Comparing both years, viewership kept on fluctuating due to multiple reasons. i.e Mar - April was low viewed months due to Loadshedding. There was a dip in overall minutes consumption during the month of September due to the ban on international channels.

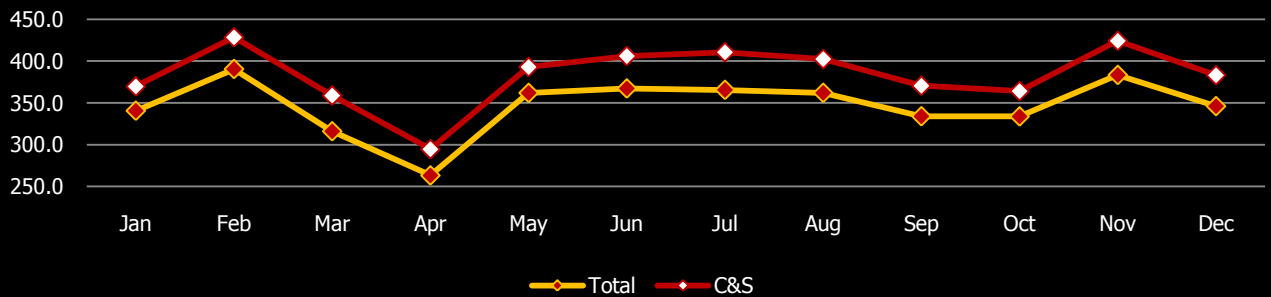
Different tournaments caused in viewership increase, i.e. Bouncer Series in Jan - Feb, T20 World Cup in May, Asia Cup- Fifa World Cup- MCC T 20 during Jun - Jul and Cool & Cool Cup during Nov - Dec.

Usage in Minutes - Household

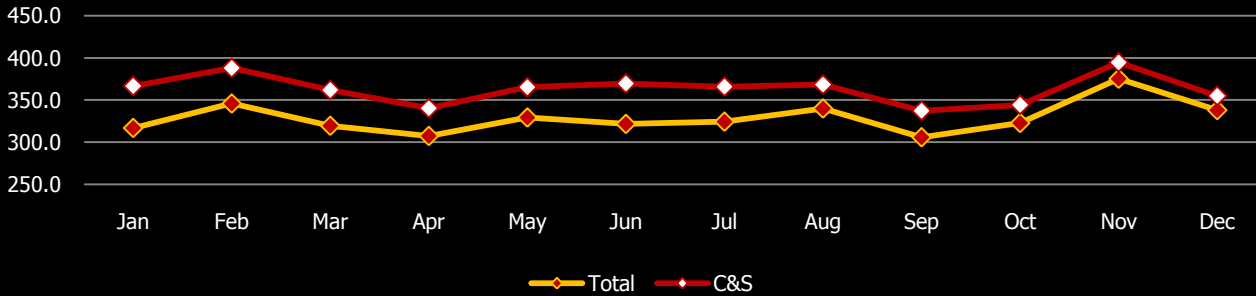
Karachi - Time Slots: 06:00 - 00:00



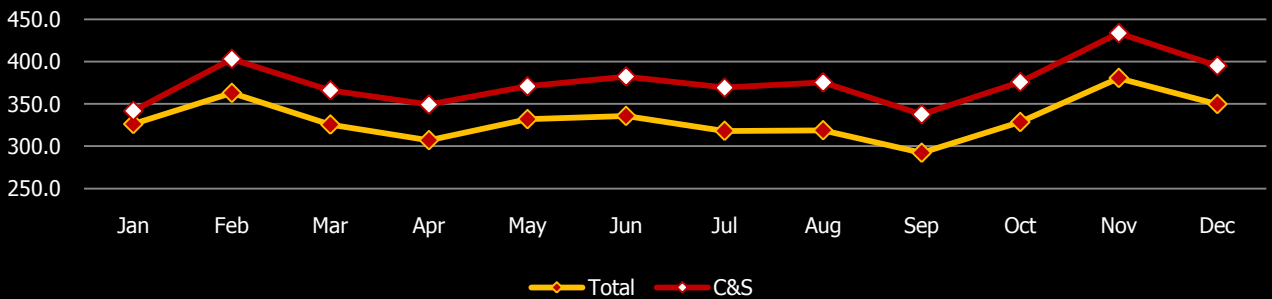
Lahore - Time Slots: 06:00 - 00:00



Islamabad/ Rawalpindi - Time Slots: 06:00 - 00:00



Non Metros - Time Slots : 06:00 - 00:00

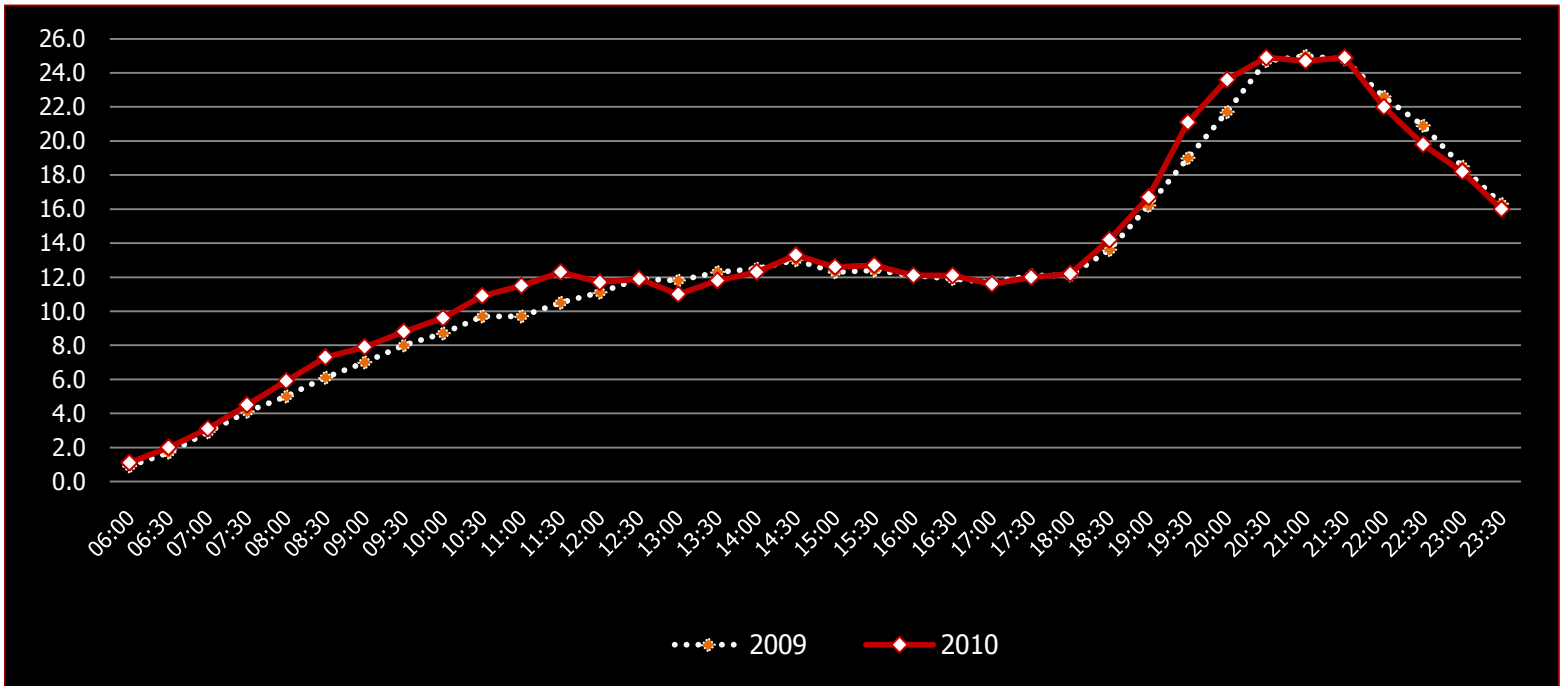


Comparing all regions, viewership in Lahore C&S was highest. On an average ,C&S HH in Lahore tuned in for 6.4 hours followed by Non Metros with an avg. of 6.3 hours whereas HHs in Karachi and Isb/Rwp tuned in with an avg. of 5.6 and 6.1 hours accordingly.

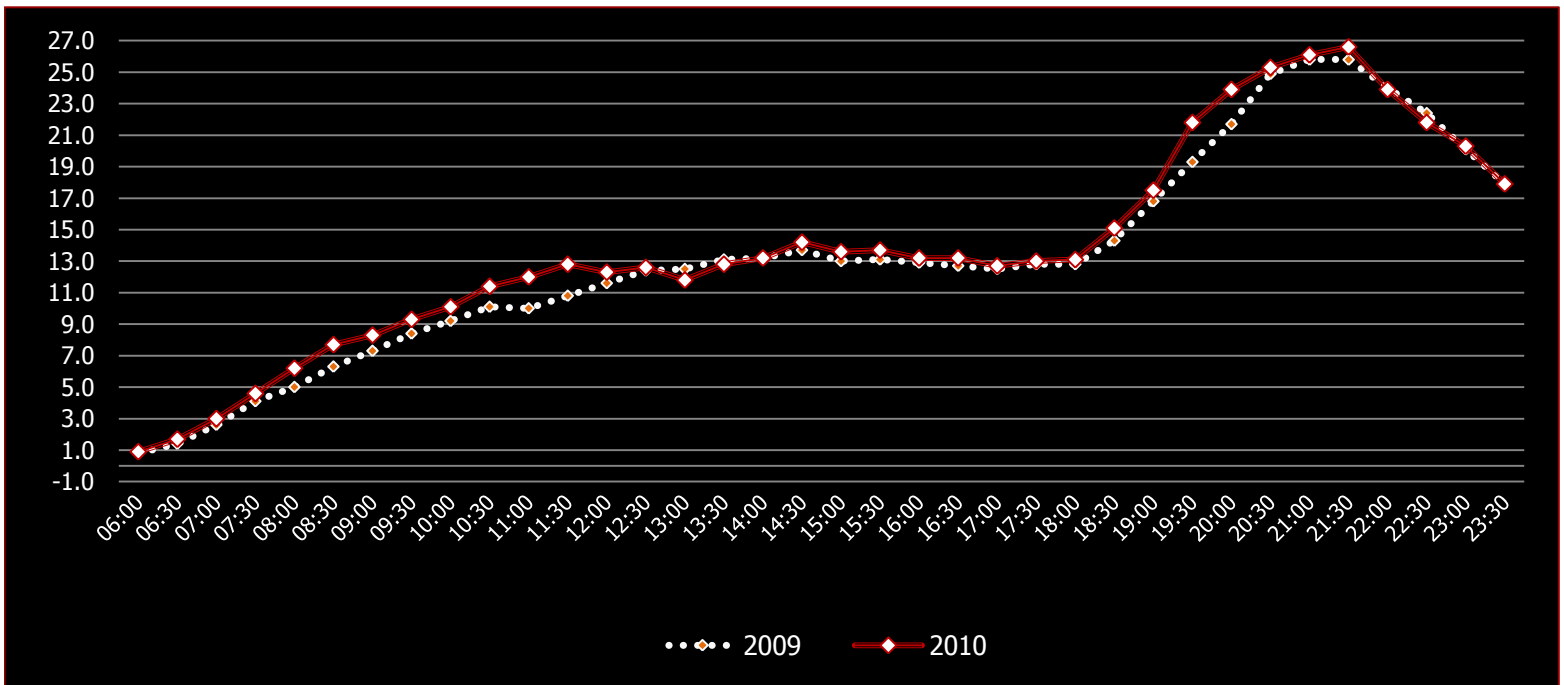
Rating% - Individual

Time Slots: 06:00 - 00:00

Total



C&S



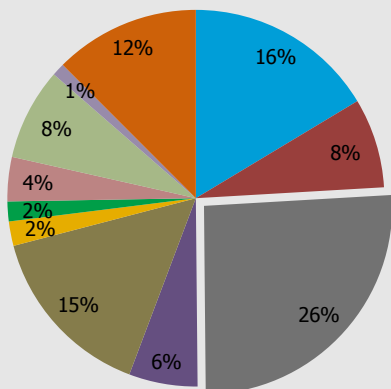
- Comparing both years, on an average viewership of 2010 were higher than 2009. This year viewership increased with a minor ratio, change on Total and C&S were 3% and 5% accordingly.

- Peak trend were remained as usual , i.e. Pre-Prime Time, Prime Time whereas there was a dip in Post Prime Time in 2010.

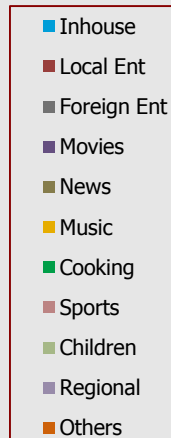
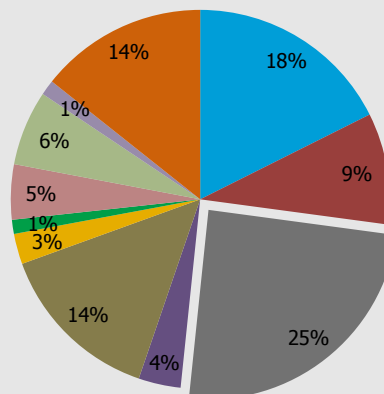
- Change in viewership share across Time Bands (Yr2010):

		Total	C&S	
Morning Slot	09:00 - 11:00	+11%	+12%	
Prime Time	20:00 - 22:00	+02%	+04%	(in 2009, increase in Prime Time were 17% on both targets)
Post Prime Time	22:00 - 00:00	-3%	-1%	(in 2009, increase in Late Night Slot were 28% and 17% on Total and C&S)

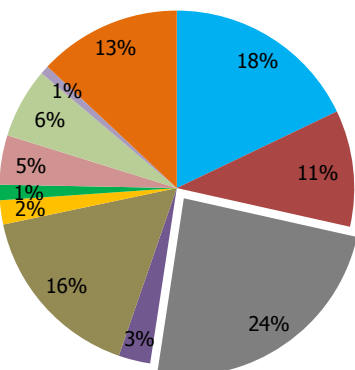
Jan - Dec 2009



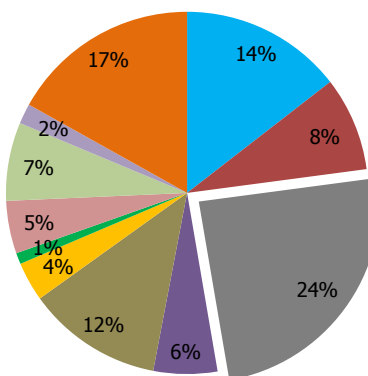
Jan - Dec 2010



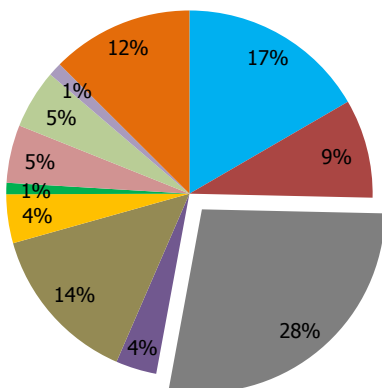
Karachi - 2010



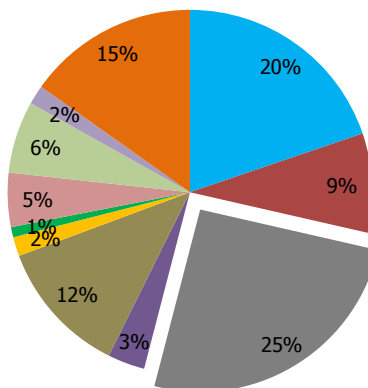
Lahore - 2010



Isb/ Rwp - 2010



Non Metros - 2010



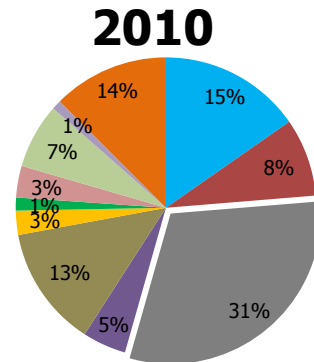
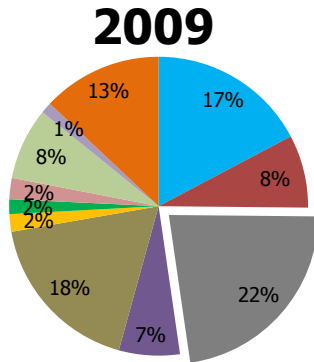
- On an average, Foreign Entertainment remained highest in terms of market share with 25% followed by Inhouse and News categories with 18% and 14% accordingly. Whereas among Local players, News remained highest with given share followed by Local Entertainment and Children category.

- News and Local Entertainment gained highest share from Karachi whereas highest viewership of Foreign Ent and Inhouse was gained from Isb/ Rwp and Non Metros accordingly.

Market Share

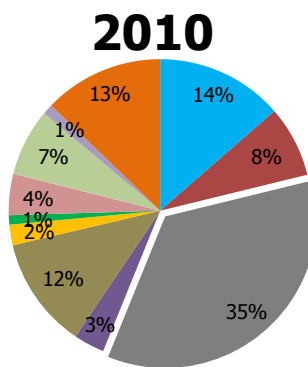
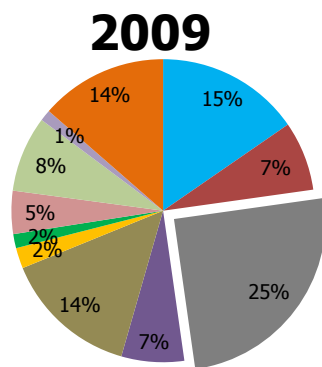
TA: C&S | Time Slots: 06:00 - 00:00

Quarter 1



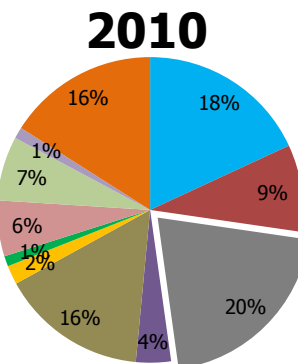
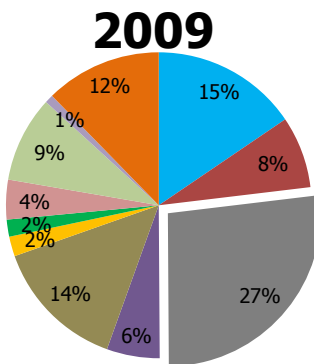
- Inhouse
- Local Ent
- Foreign Ent
- Movies
- News
- Music
- Cooking
- Sports
- Children
- Regional
- Others

Quarter 2



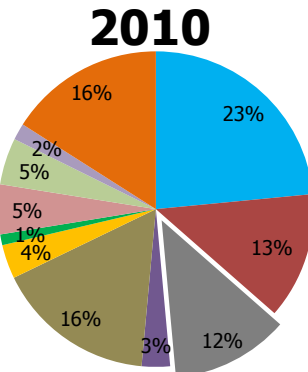
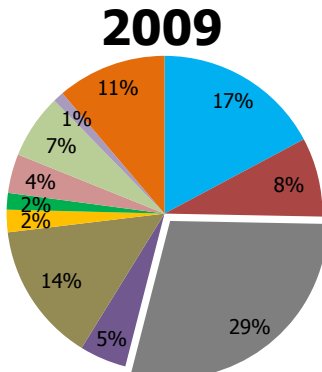
- Inhouse
- Local Ent
- Foreign Ent
- Movies
- News
- Music
- Cooking
- Sports
- Children
- Regional
- Others

Quarter 3



- Inhouse
- Local Ent
- Foreign Ent
- Movies
- News
- Music
- Cooking
- Sports
- Children
- Regional
- Others

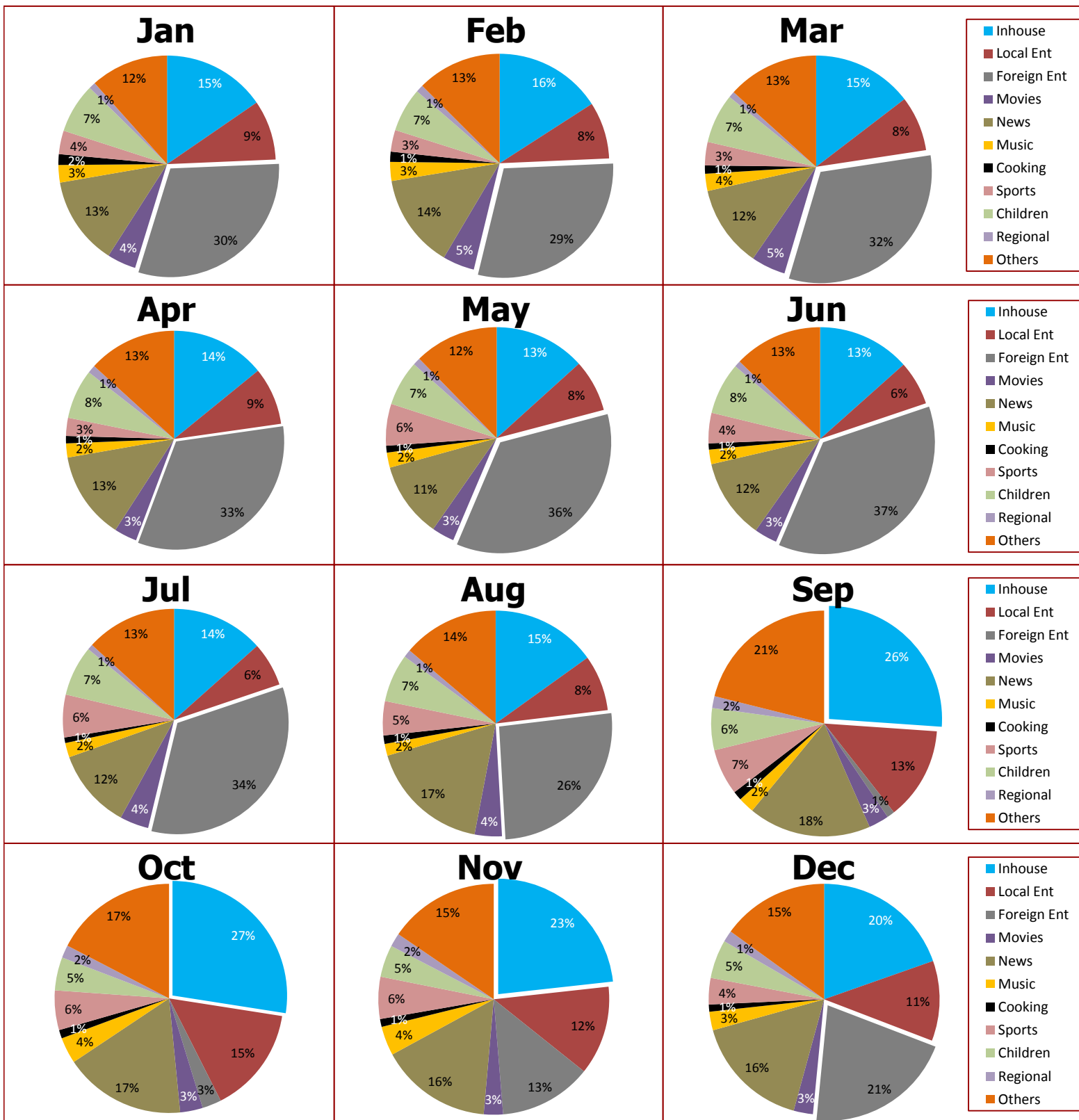
Quarter 4



- Inhouse
- Local Ent
- Foreign Ent
- Movies
- News
- Music
- Cooking
- Sports
- Children
- Regional
- Others

Comparing 2009 & 2010, viewership of Inhouse remained low during first 02 qtrs of 2010 but due to ban on foreign channels audience shifted to inhouse and local Ent channels. Reason for this shift to Inhouse channels could be the airing of recorded programs of banned channels.

Market Share - Genre Wise
TA: C&S
Time Slots-06:00 - 00:00

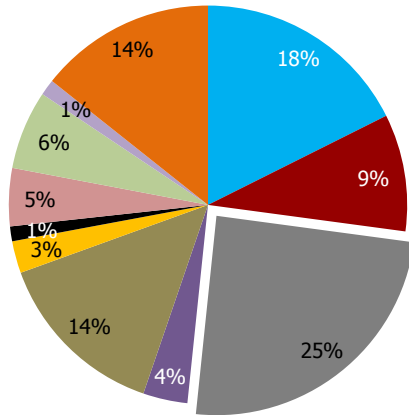


- Sports Category remained highlighted during complete year due to different tournaments on Geo Super and Ten Sports.

- A major change in viewership occurred due to ban on Foreign Entertainment Channels during August 2010, specially on Local Ent and Inhouse.

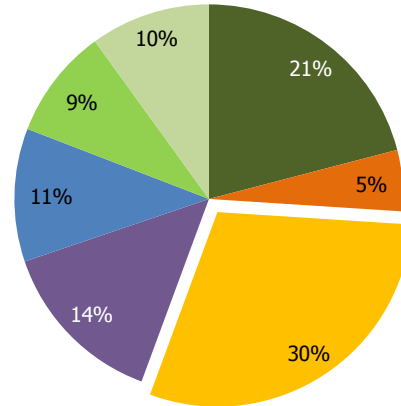
Intra Channel Share - Genre Wise
TA: C&S
Time Slots-06:00 - 00:00

Jan - Dec 2010



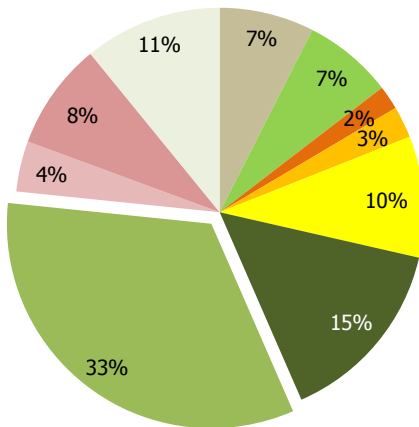
- Inhouse
- Local Ent
- Foreign Ent
- Movies
- News
- Music
- Cooking
- Sports
- Children
- Regional
- Others

**Local Ent
Jan - Dec 2010**



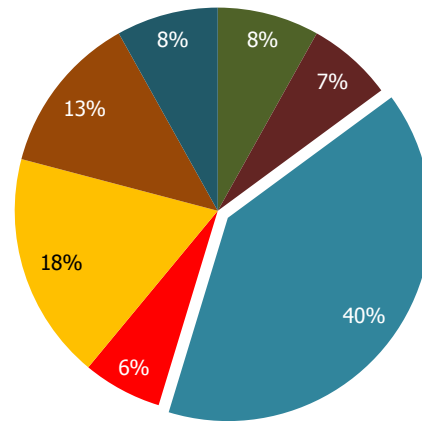
- ARY DIGITAL*
- Atv*
- GEO Ent*
- Hum*
- PTVhome*
- TV one*
- Others

**Local News
Jan - Dec 2010**



- Aaj TV*
- ARY NEWS*
- CNBC*
- Dawn News*
- Dunya TV*
- ExpNews*
- GEO News*
- News1*
- Samaa*
- Others

**Local Music
Jan - Dec 2010**



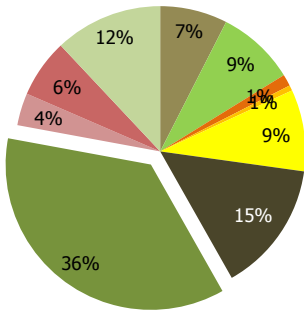
- Aag*
- ARY MUSIK*
- GKaBoom*
- MTV Pak*
- Play*
- Oxygene*
- Others

Top 03 Channel lead the Category:

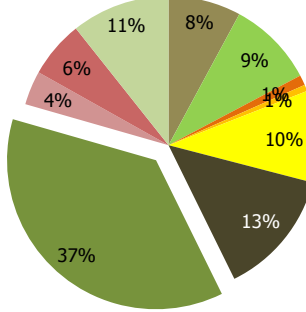
Local Entertainment Geo Ent, ARY Digital & Hum
 Local News Geo News, Express News & Dunya
 Local Music GKaBoom, Play & Oxygene

Local News Channels
TA: C&S | Intra-Channel Share
Time Slots-06:00 - 00:00

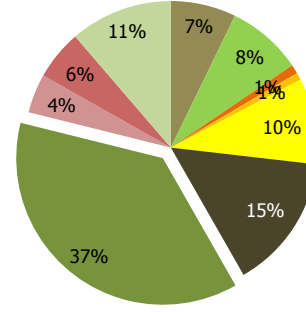
Jan



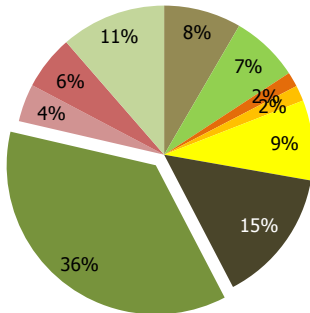
Feb



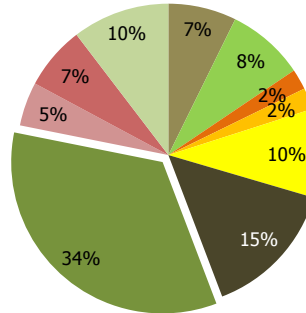
Mar



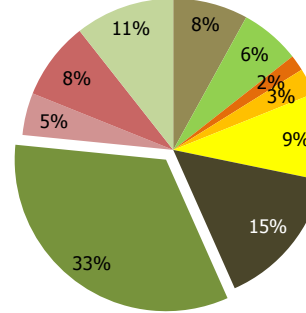
Apr



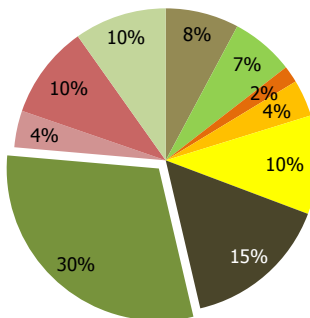
May



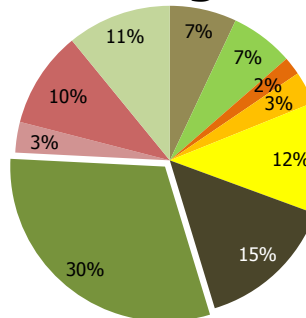
Jun



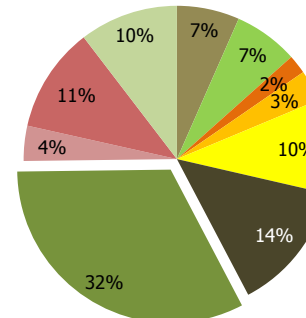
Jul



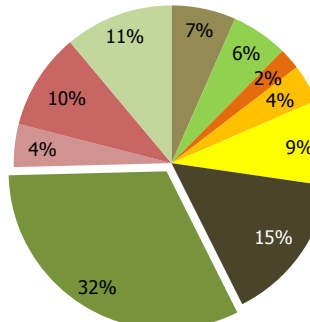
Aug



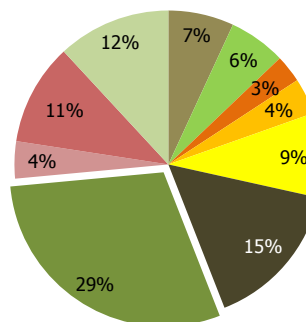
Sep



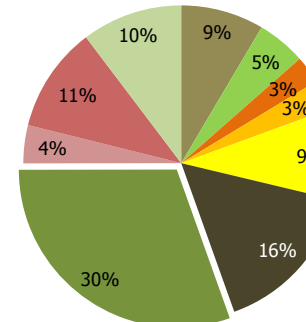
Oct



Nov

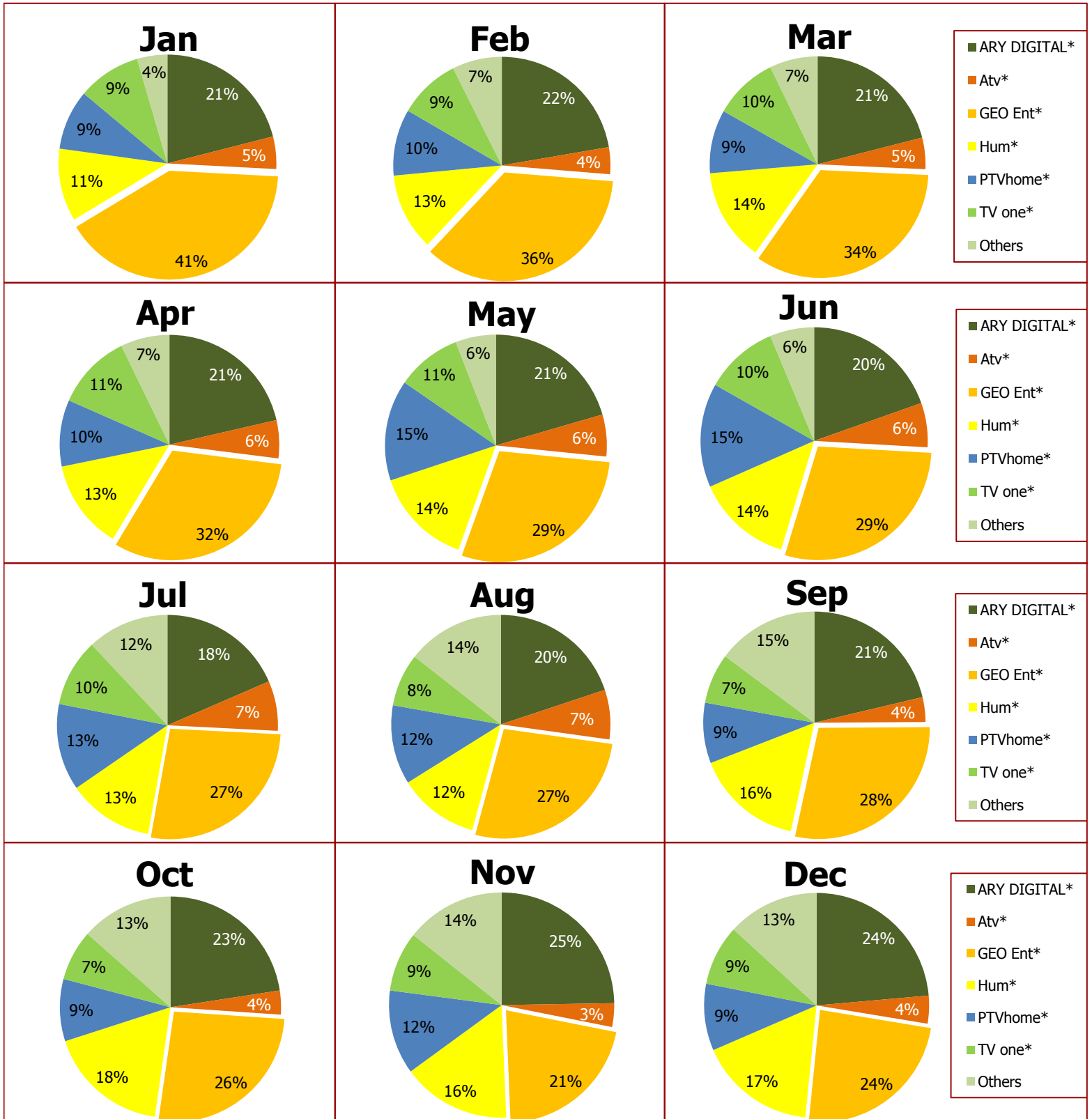


Dec



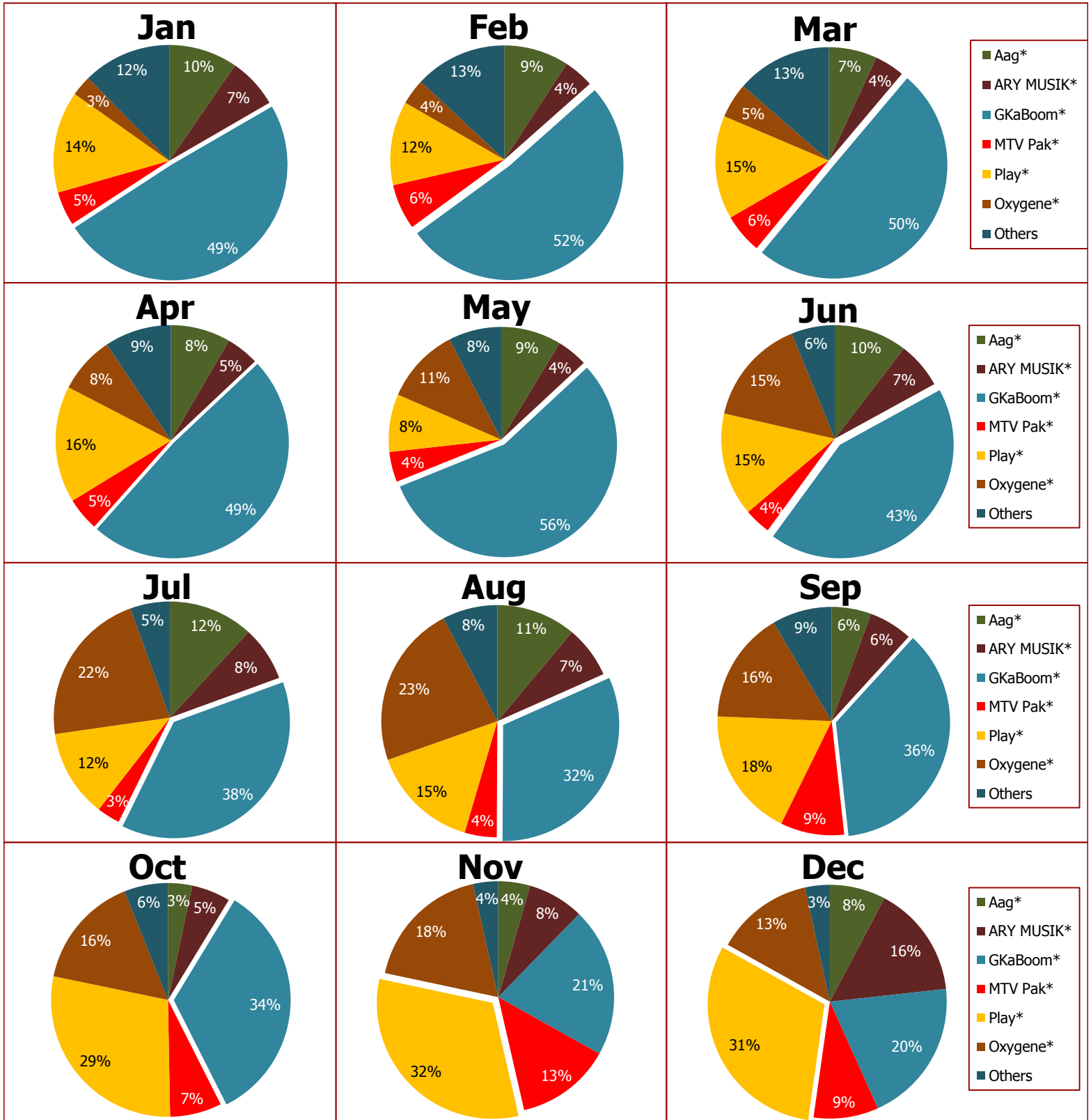
- Highest market share of News category was 18% in the month of September.
- Geo News remained highest with Express News and Dunya TV following it.
- Dawn News and Samaa picked viewership during 2010, viewership of Dawn started increasing during April'10 whereas Samaa from Jun'10 onward.

Local Entertainment Channels
TA-C&S | Intra-Channel Share
Time Slots-06:00 - 00:00



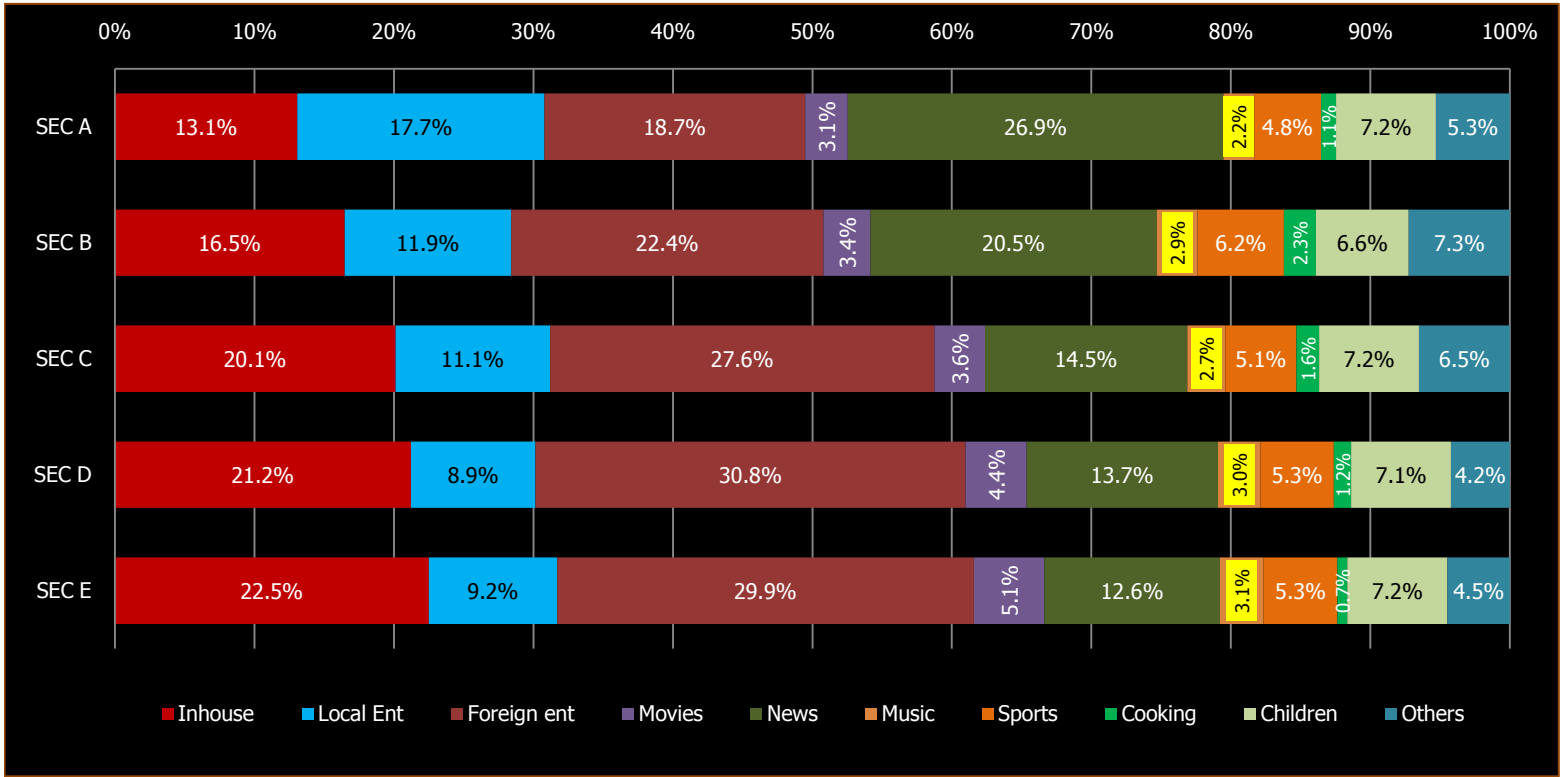
- On C&S audience, average market share of Local Ent during 2010 was 9%. Geo lead the category with ARY and Hum following it.
- Share% of Local Ent increased from Sep 2010 onward due to Ban to Foreign Ent channels.

Local Music Channels
TA-C&S | Intra-Channel Share
Time Slots-06:00 - 00:00

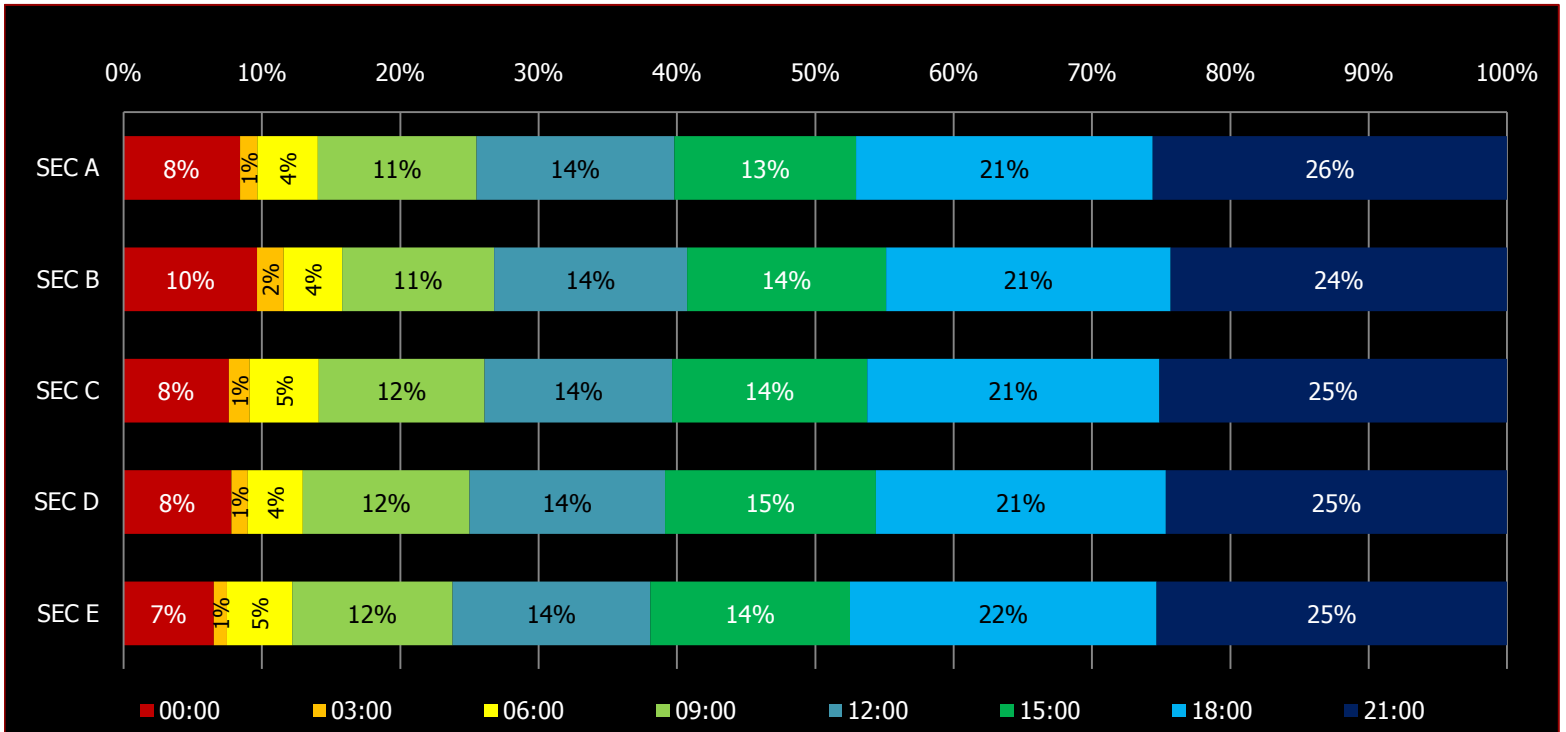


- Play TV, Oxygene and MTV picked share during the year whereas there was considerable dip in GKaBoom viewership.

TV Usage Insight - Genre Wise
In term of Minutes Consumed
Time Slots-06:00 - 00:00 | C&S



TV Usage Insight - Time Band Wise
In Terms of Minutes Consumed
Time Slots-24Hrs | C&S



Average Top 03 viewed genres across all SECs

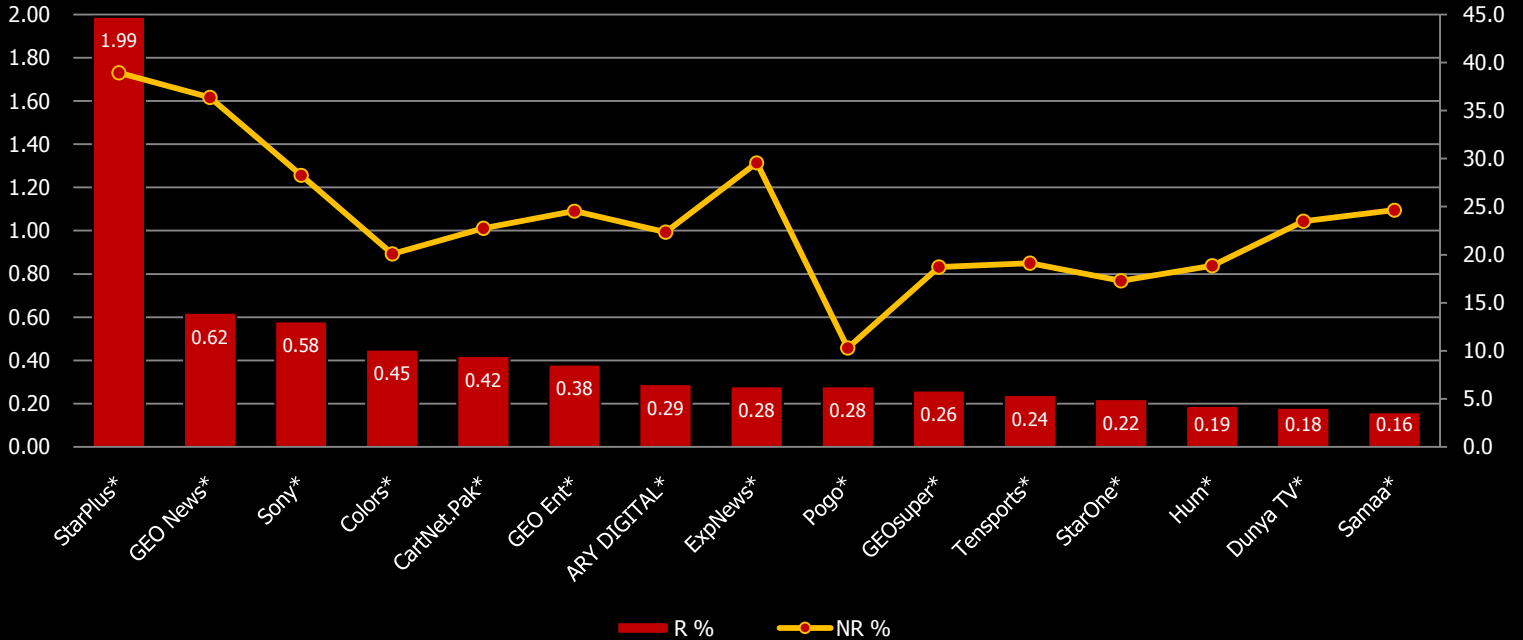
- Foreign Ent
- Inhouse
- News

Average Top 03 viewed slots across all SECs:

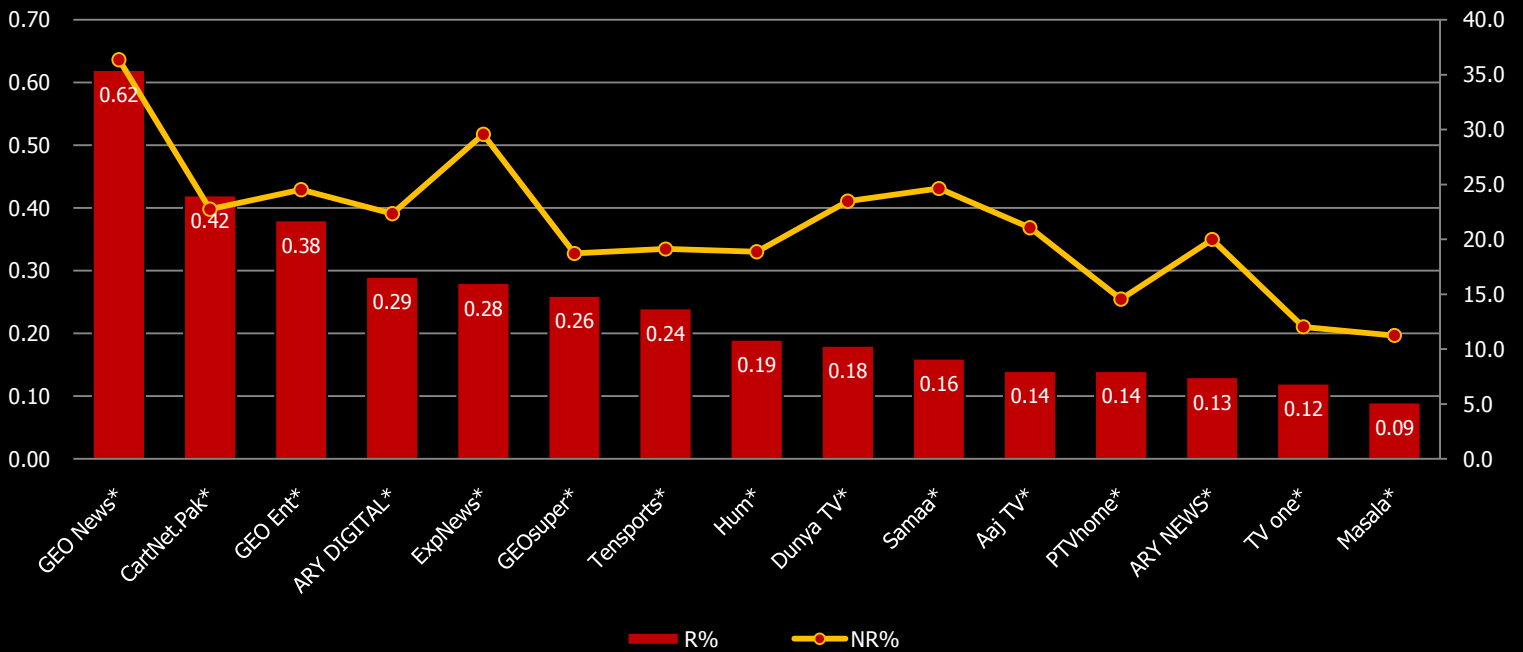
- 21:00 - 00:00
- 18:00 - 21:00
- 15:00 - 18:00

Top 15 Channels
TA: C&S | Avg Rating%
Time Slots-06:00 - 00:00

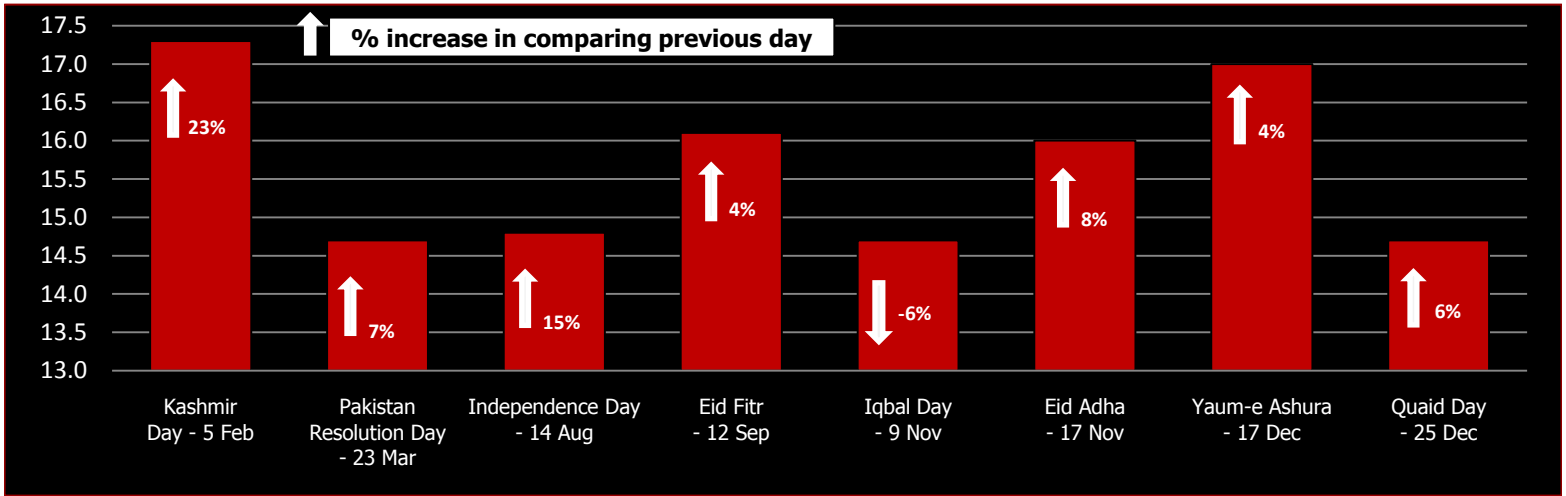
Top 15 Foreign and Local Channels (in terms of Avg Rating & Reach)



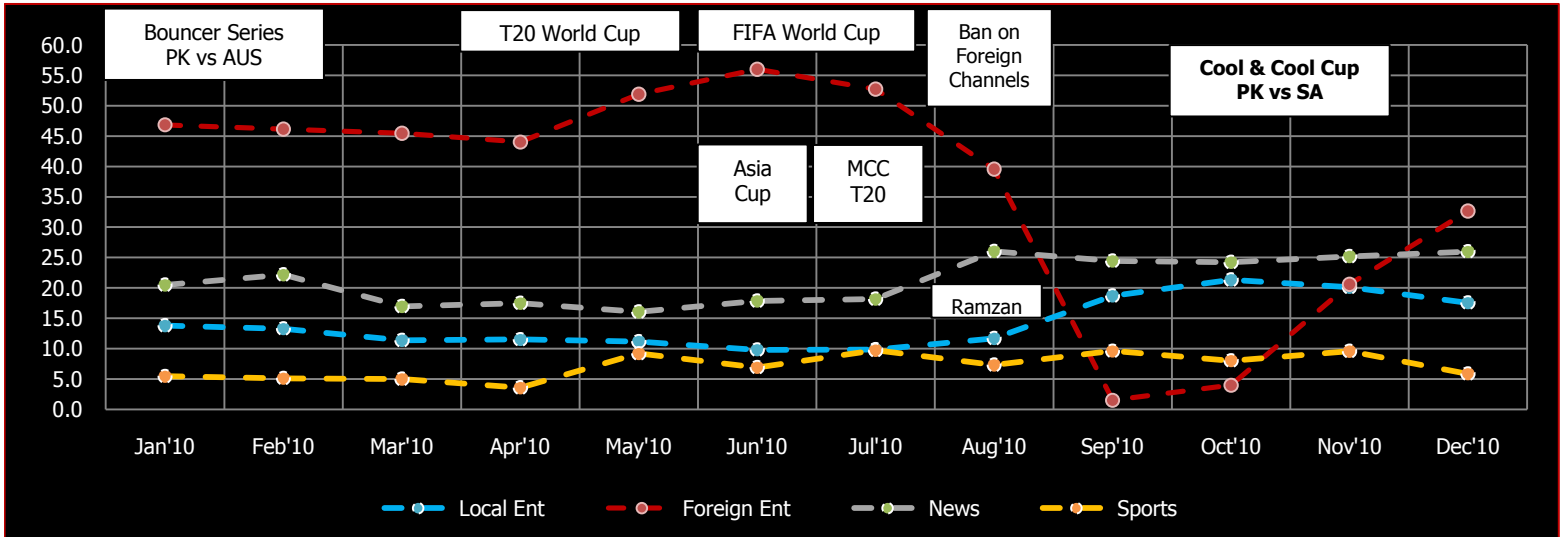
Top 15 Local Channels (in terms of Average Rating & Reach)



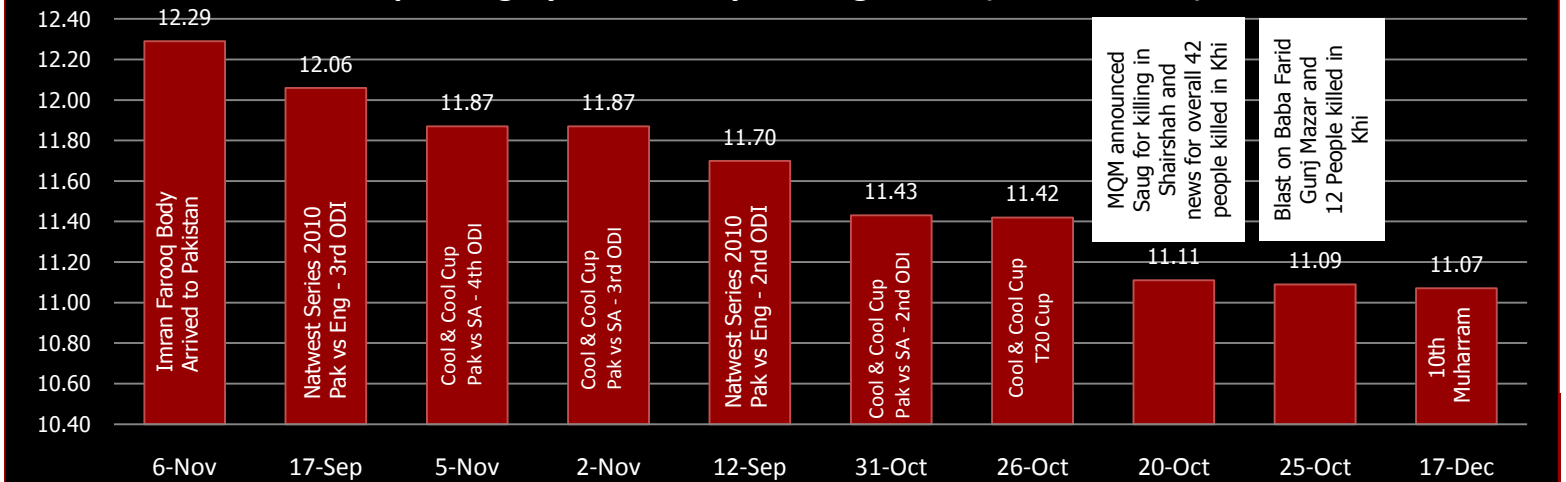
Viewership Review of Public Holidays
TA: C&S | Minutes Consumed
Time Slots-06:00 - 00:00



Monthly Viewership Review
TA: C&S | Minutes Consumed
Time Slots-06:00 - 00:00



Top 10 highly viewed days during 2010 - (06:00 - 00:00)



Top days are being taken on the basis of highest Rating days and reason is given on the basis of top programs during same day i.e. on 20 Oct News on GeoN gained 3.4 % rating which was highest among all competitors and reason is mentioned accordingly.