

MEDIA SECTOR

TELEVISION

BLOG

NEWSPAPER

NEWS

INTERNET

SATTELITE

MEGAPHONE

TELEVISION

BROADCASTING

SNAPSHOT

RADIO

CAMERA

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OVERVIEW OF MEDIA INDUSTRY IN PAKISTAN

Brief History

- ▶ Pre- partition mainly the medium constituted Newspapers.
- ▶ Establishment of Pakistan Broadcasting Corporation on 14th August 1947 (**Radio Pakistan**)
- ▶ Pakistan Television Network (PTV) state owned channel aired for the first time on November 26, 1964. It was the only TV channel till 1990.
- ▶ Post 2002 era, emergence of private TV channels.

Current Status

- ▶ Total no. of Newspaper & Magazines in Pakistan - more than 500
- ▶ Total no. of TV channels in Pakistan - more than 85
- ▶ Total no. of FM radio stations in Pakistan - more than 180

MEDIA INDUSTRY | STATISTICS

Sector attracted cumulative investment of approximately \$4-\$5 billion in the last decade

New Licenses expected to inject \$2mIn - \$3mIn

PEMRA issued 4,062 cable licenses till March 2020.




The sector provides employment to more than 300,000 people.

Total TV Viewers 168million (76% of total population)

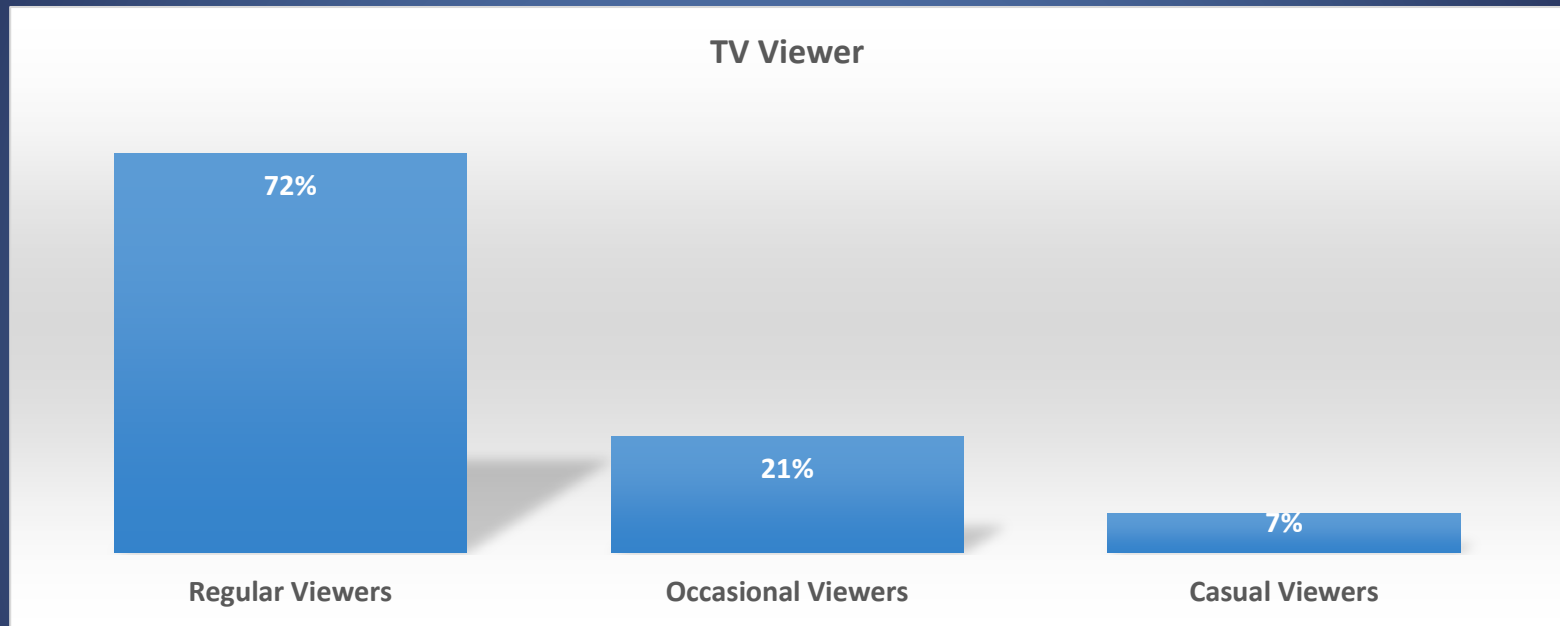
Total Cable/ Satellite outreach 110million (65% of total viewership)

MEDIA SEGMENTATION

Three broad forms of media segmentation are;

- **Print Media**  **Newspapers,
Magazines**
- **Electronic Media**  **Television, Cable,
Internet**
- **Digital Media**  **Websites,
Social Media**

TV VIEWERSHIP – VIEWING TIME

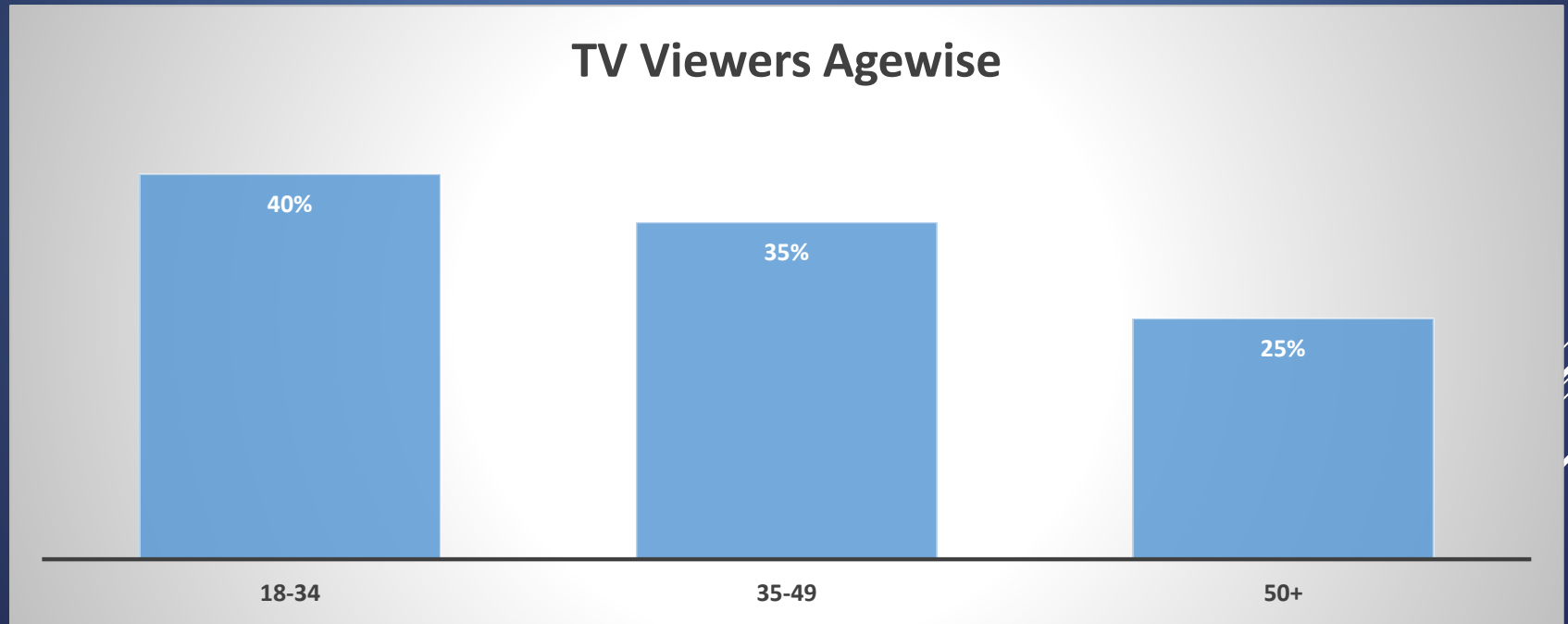


Greater than equal to
480 minutes per week

Greater than 240 minutes,
lesser than 480 minutes
per week

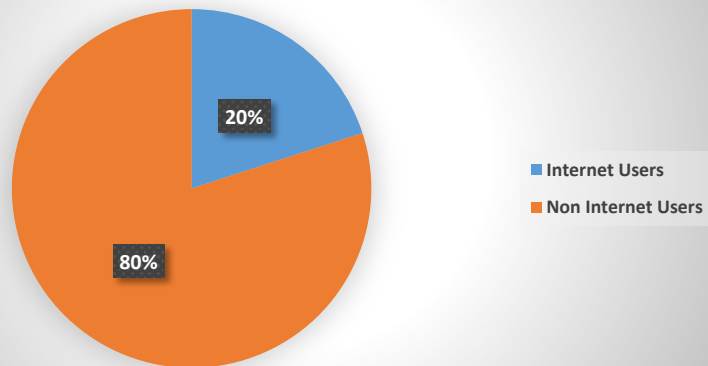
Lesser than 40 minutes
per week

TV VIEWERSHIP – AGEWISE

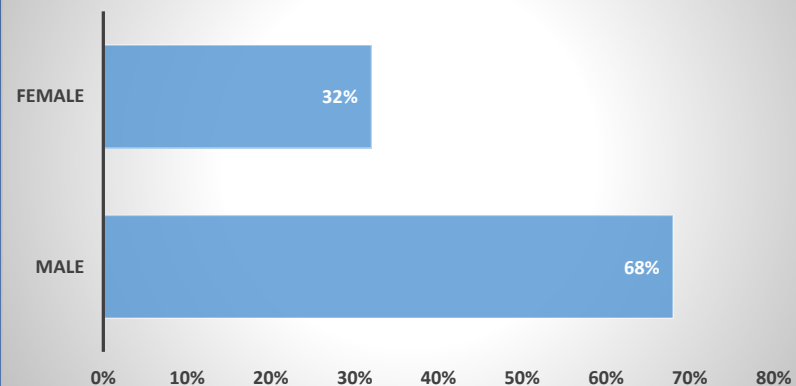


INTERNET USERS – SEGMENTATION

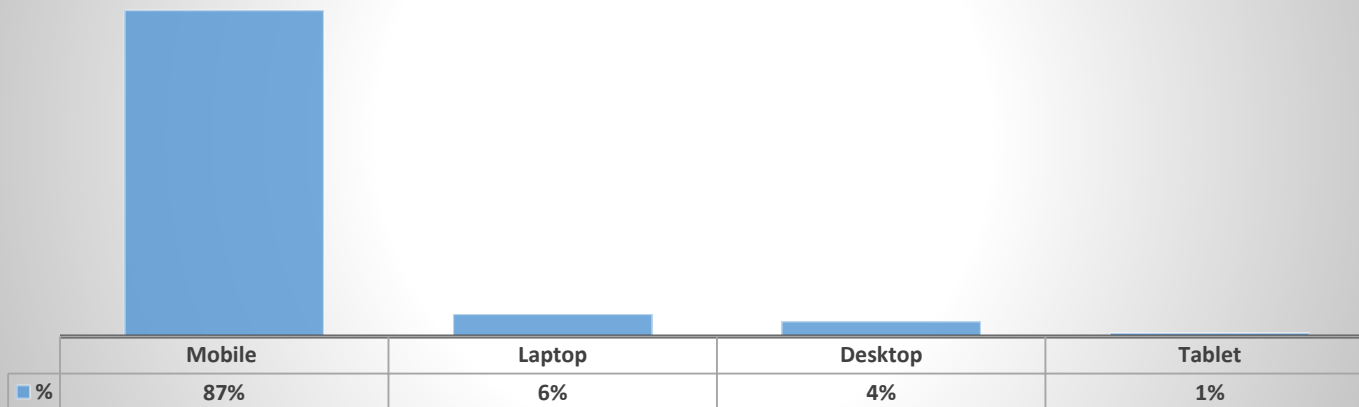
Internet Users in the Country



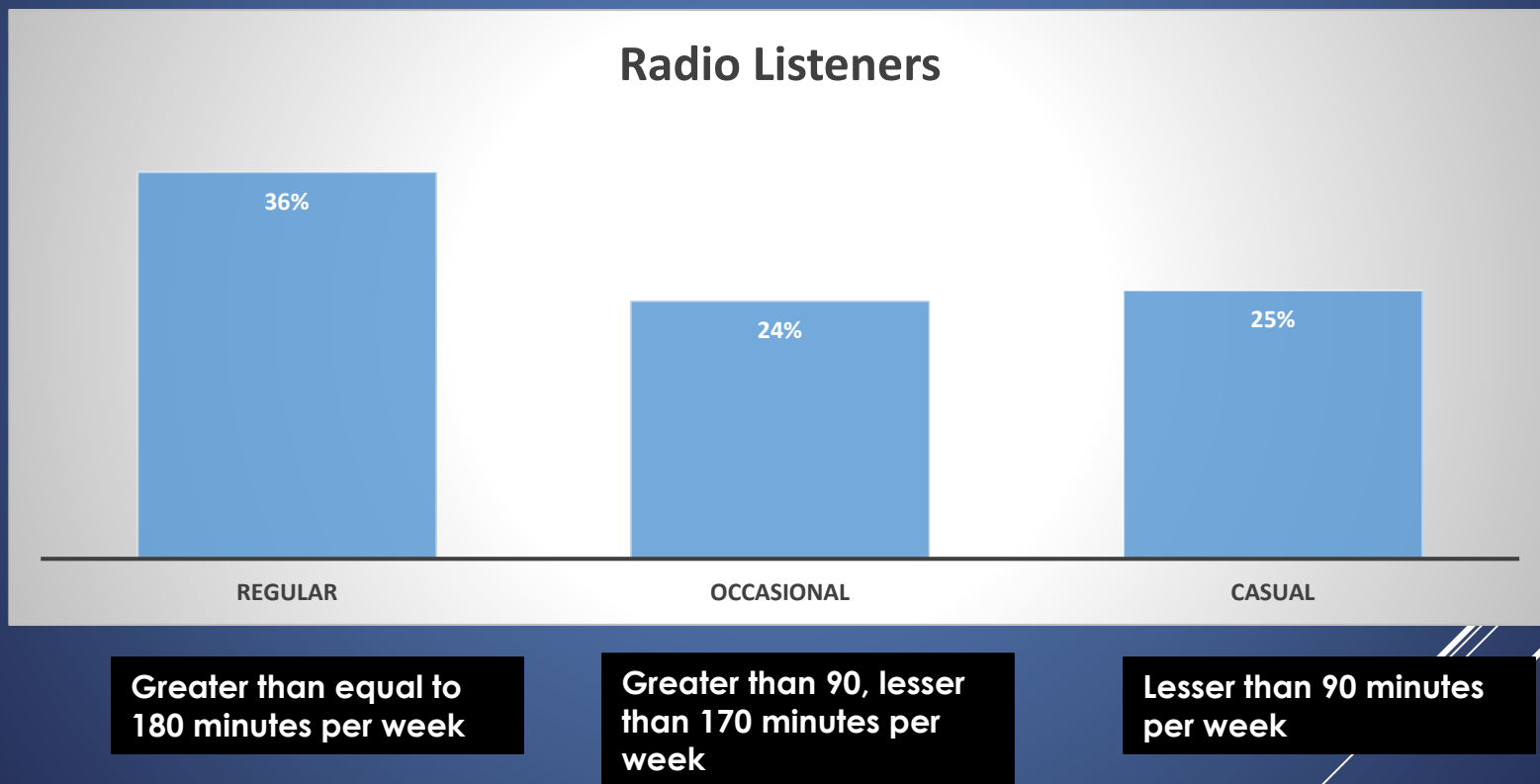
Internet Users - Age Wise



Internet Usage by device



RADIO LISTENERS – LISTENING TIME



SOCIAL MEDIA INDUSTRY

Key Facts

45million users

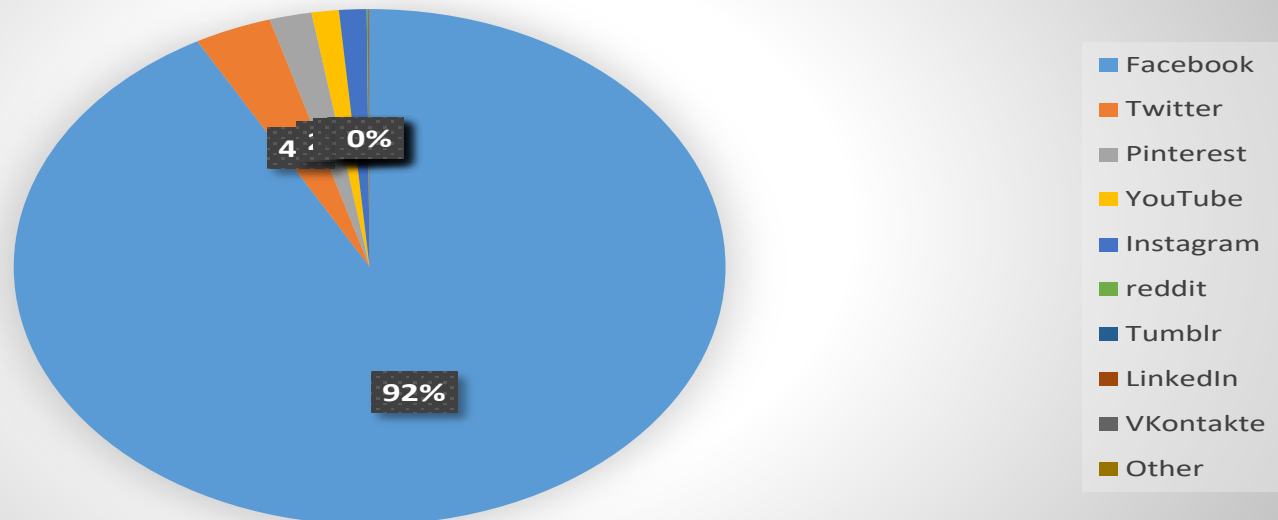
Ranked among the top 20 countries

8million mobile phone users are active on social media

Among the total population, 82% population is mobile users

According to an estimate, out of 109.5 million mobile users, there are 32 Million users accessing social media using mobiles and overall penetration rate is 55%

Social Media Usage by Platform



SOCIAL MEDIA - BEHAVIOUR

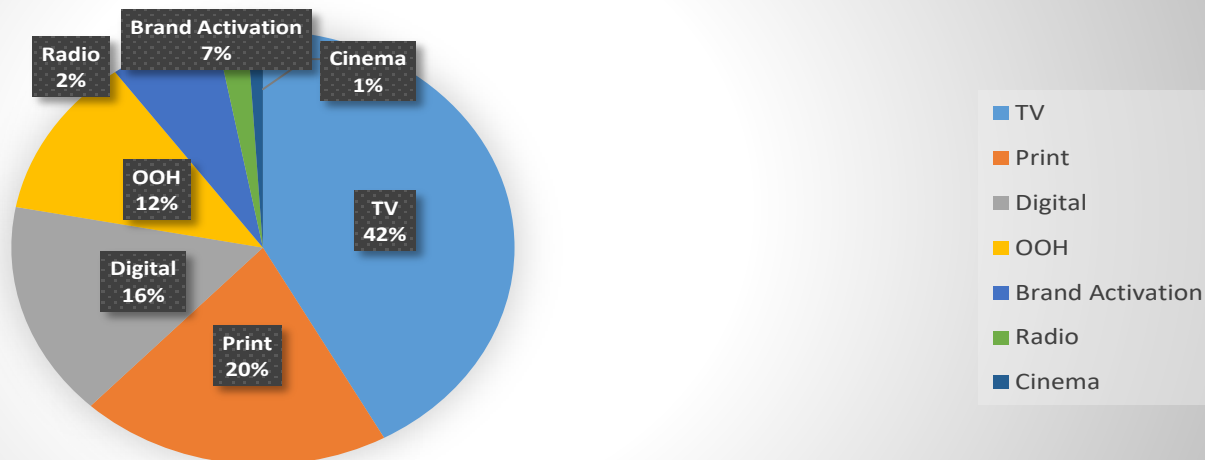
- With a ban on social gatherings, Pakistani users are looking to connect on Facebook, WhatsApp and Twitter as the platforms have all seen active user numbers grow towards an upward trend during the period.
- During the Covid-19 outbreak in Pakistan, Facebook's website usage saw an increase of 6.94pc as compared to a 2.8pc increase in its app users.
- With a growing need to connect through messaging as offices and schools have gone remote, WhatsApp's desktop usage has also gone up by 23.5pc.
- Similarly, desktop users for Twitter saw a 22.84pc surge as more people are seeking updates related to Covid-19 — that are now often released on Twitter.

ADVERTISEMENT SPEND – MEDIUM WISE

Key Facts

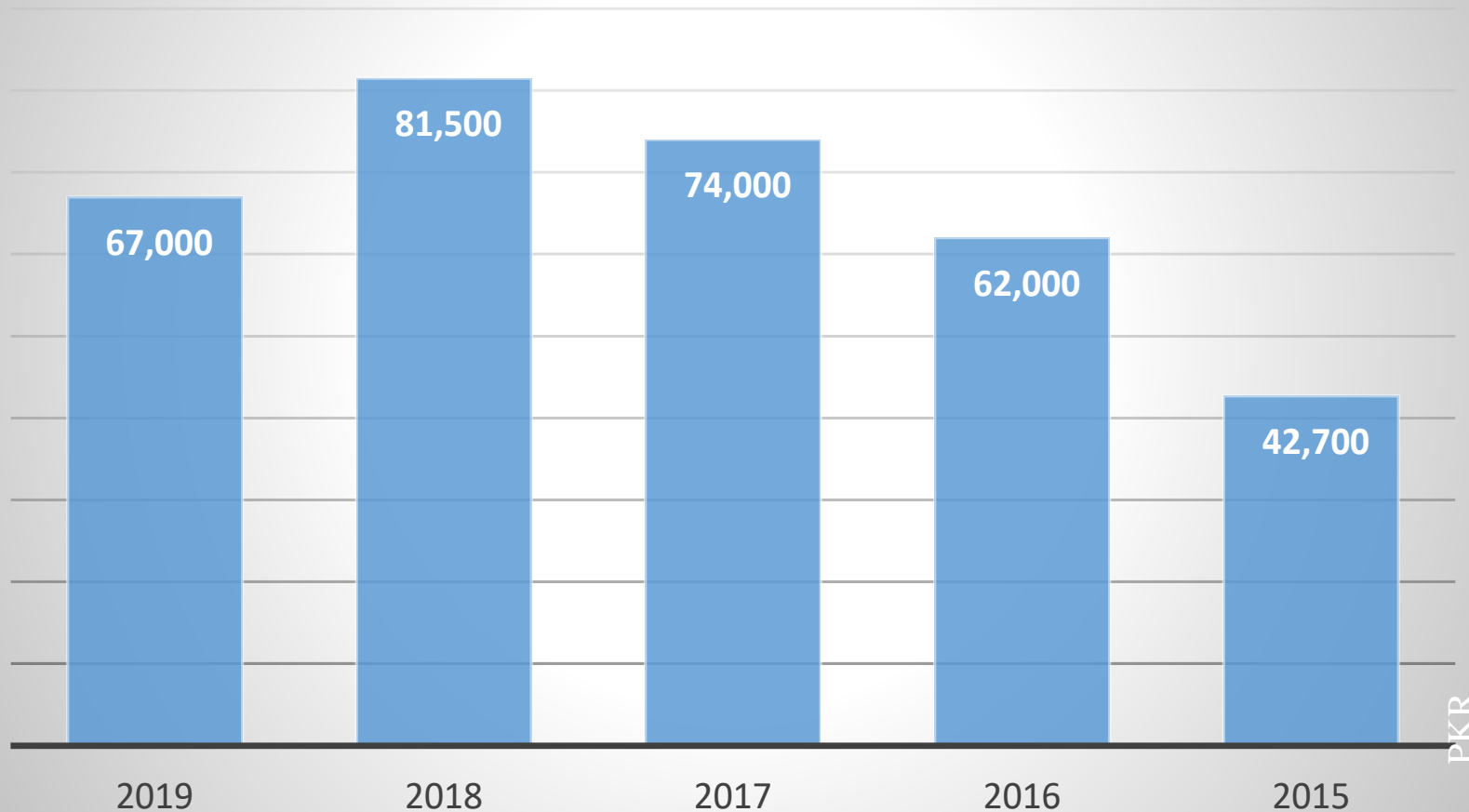
Total Advertising Market	PKR 67bln
TV Advertising	PKR 28bln
Print Media Advertising	PKR 13.4bln
Out of Home Advertisement	PKR 8bln
Digital Advertising	PKR 10bln
Brand Activation	PKR 4.6bln
Radio Advertising	PKR 1bln
Cinema Advertising	PKR .6bln

Total Advertisement Spend



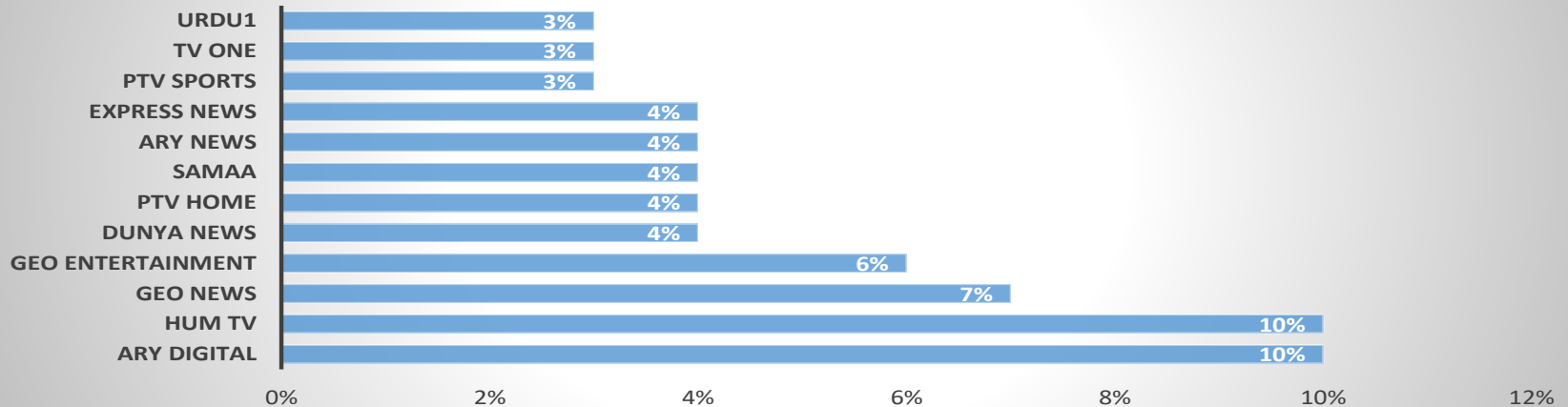
5 YEAR ADVERTISEMENT SPEND

Advertisement spend

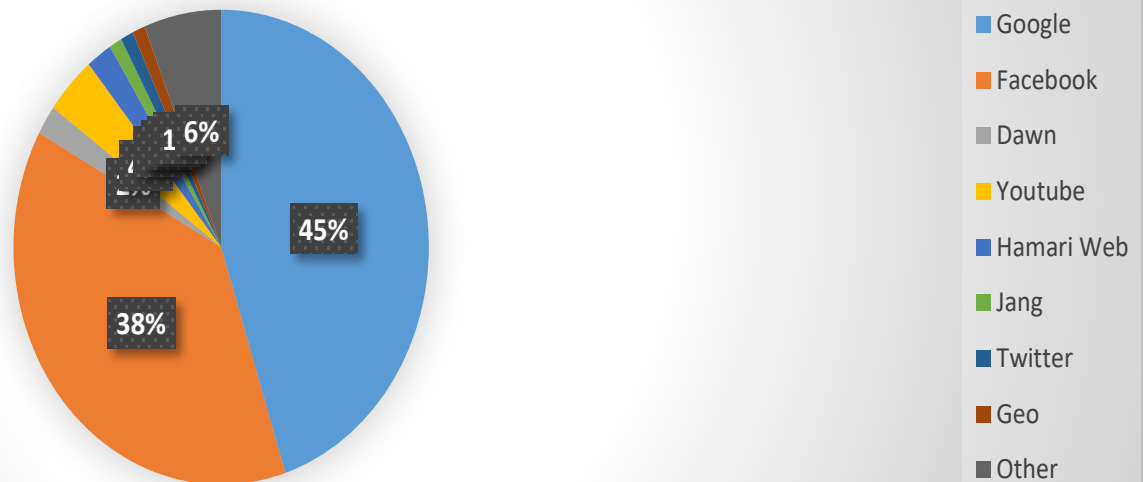


ADVERTISEMENT SPEND – TV

Channel Wise Spend

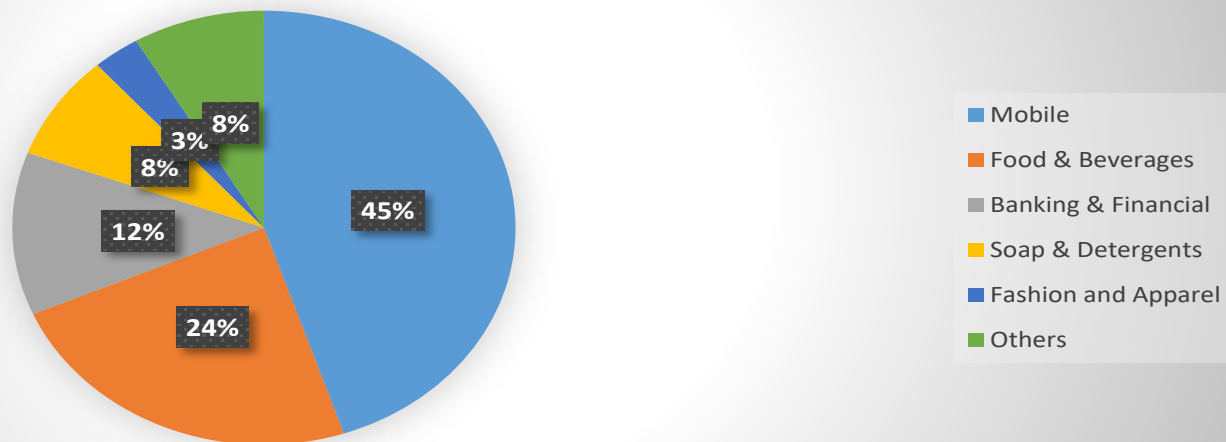


% of Digital Advert Spend

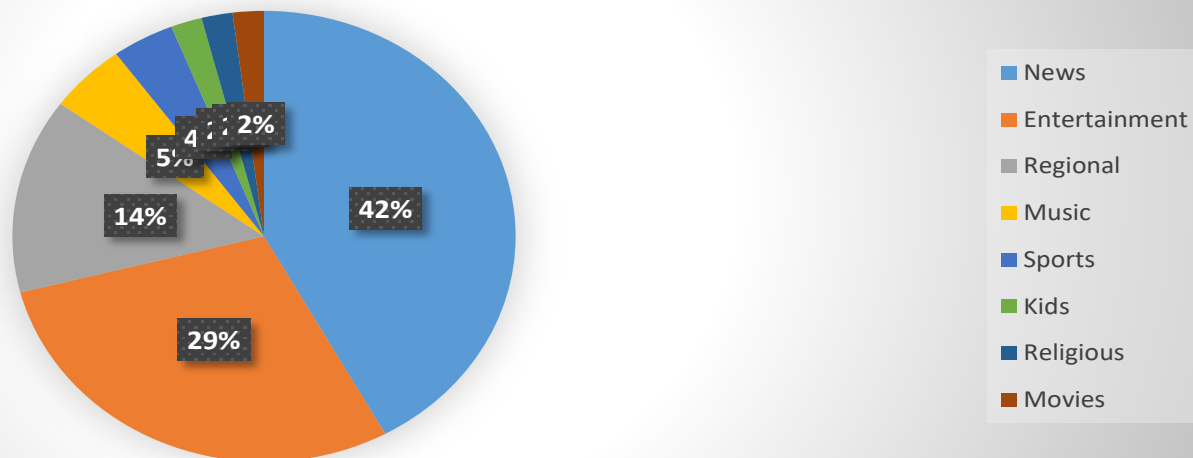


ADVERTISEMENTS – SECTOR & GENRE WISE

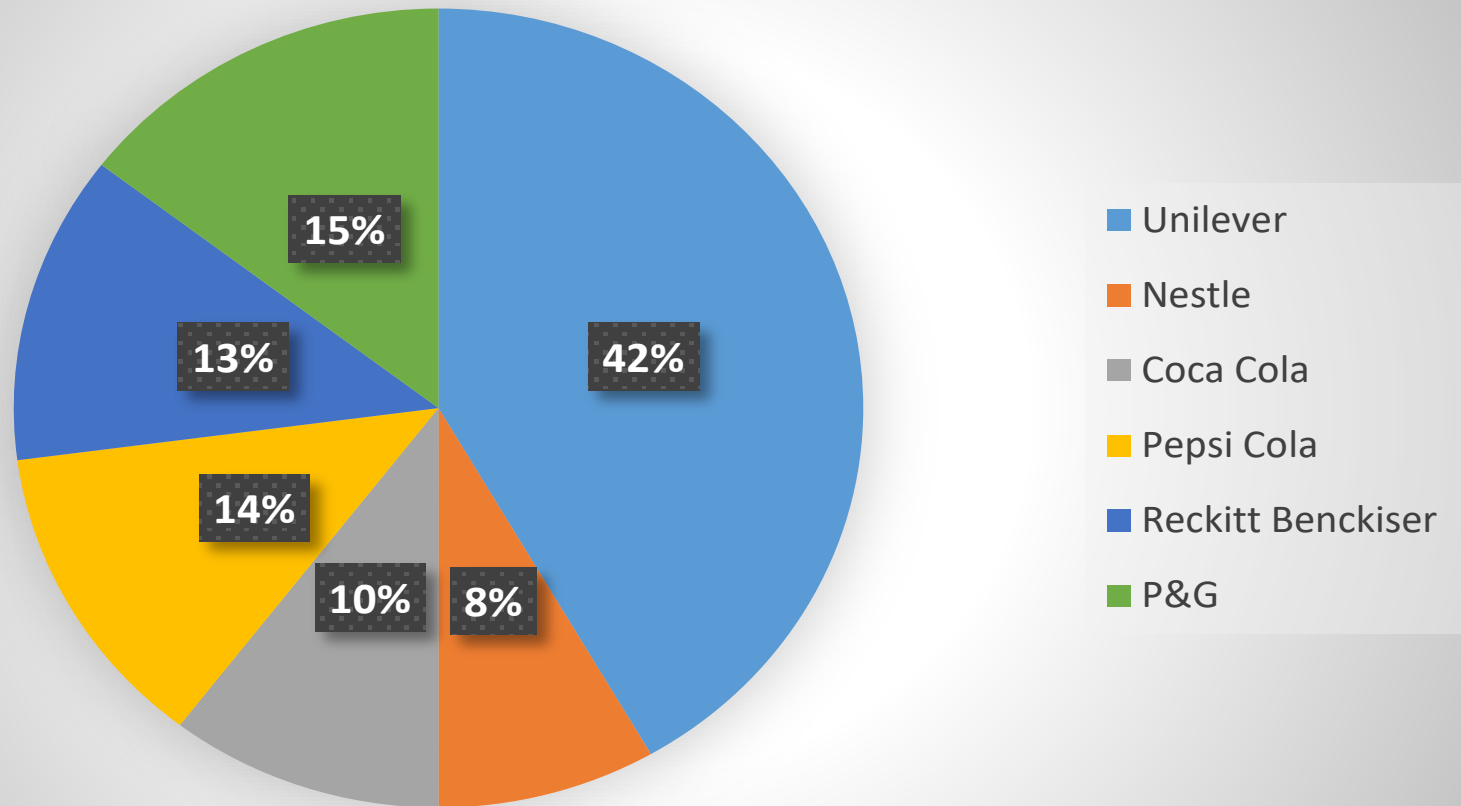
Sectorwise Spend



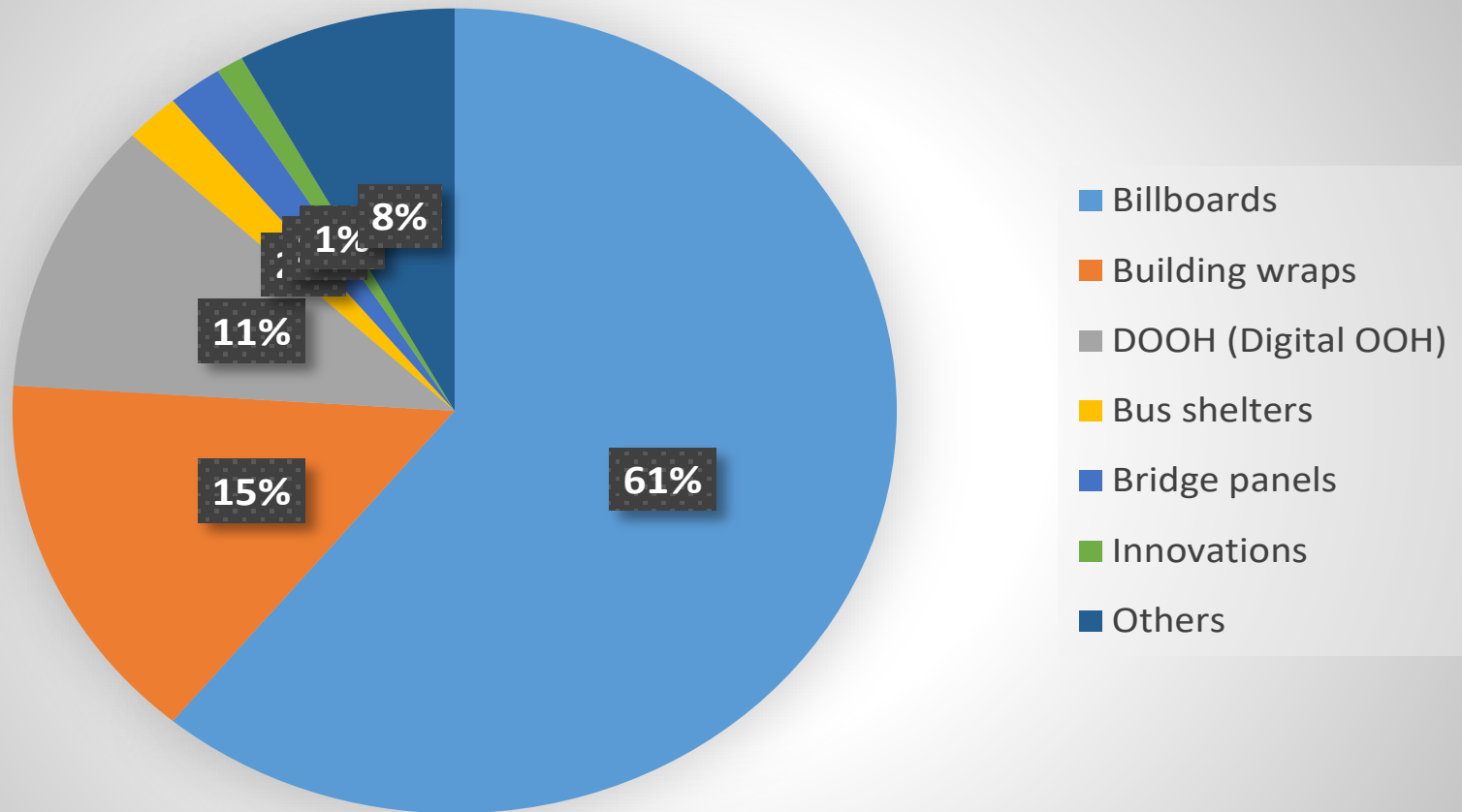
Genre



ADVERTISEMENTS – TOP BRANDS



ADVERTISEMENT SPEND BY ELEMENT



REGULATOR

Pakistan Electronic Media Regulatory Authority (PEMRA)

- ▶ Established on March 1, 2002, An independent and constitutionally established federal institution responsible for regulating and issuing channel licenses for establishment of the mass-media culture, print and electronic media.

Mandate

- ▶ Improve the standards of information, education and entertainment.
- ▶ Enlarge the choice available to the people of Pakistan in the media for news, current affairs, religious knowledge, art, culture, science, technology, economic development, social sector concerns, music, sports, drama and other subjects of public and national interest.
- ▶ Facilitate the devolution of responsibility and power to the grass roots by improving the access of the people to mass media at the local and community level.
- ▶ Ensure accountability, transparency and good governance by optimization the free flow of information.

CHALLENGES

1. Reduction in advertisement spend. 2019 witnessed a decline in the total spend after witnessing high budgets since 2015
2. Online Channels provide a substitute income and the increase in internet users will have an adverse impact on the satellite channels
3. Online Advertisements have become a threat to ATL/BTL strategies
4. Rapid Emergence of Mobile TV due to 3G/4G
5. Amidst the rise of social media, people switching to blogs/video blogs from conventional newspaper
6. Foreign Content and drama may impact the demand of local content
7. Limited availability of content. Production to resume subject to end of pandemic which has been suspended since the onset of COVID-19

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