






Media

Media - Definition

❖ “Communication channels through which news, entertainment, education, data, or promotional messages are disseminated. Media includes every broadcasting such as newspapers, magazines, TV, radio, billboards, direct fax, and internet”

Segments of Media

Three broad forms of Media are;

- | | | |
|----------------------|---|---------------------------------------|
| I. Print Media |  | •Newspaper, Magazines etc |
| II. Electronic Media |  | •TV, Cable, Internet, Fax etc |
| III. Digital Media |  | •Social Media (Facebook, Twitter etc) |

Overview of Media Industry in Pakistan

Brief History

- ◆ Pre- partition mainly the medium constitutes Newspapers.
- ◆ Establishment of Pakistan Broadcasting Corporation on 14th August 1947. (Radio Pakistan)
- ◆ Pakistan Television Network (PTV) state owned channel aired first time on November 26, 1964. The only Channel remained till 1990.
- ◆ Post 2002 era, emergence of Private TV channels.

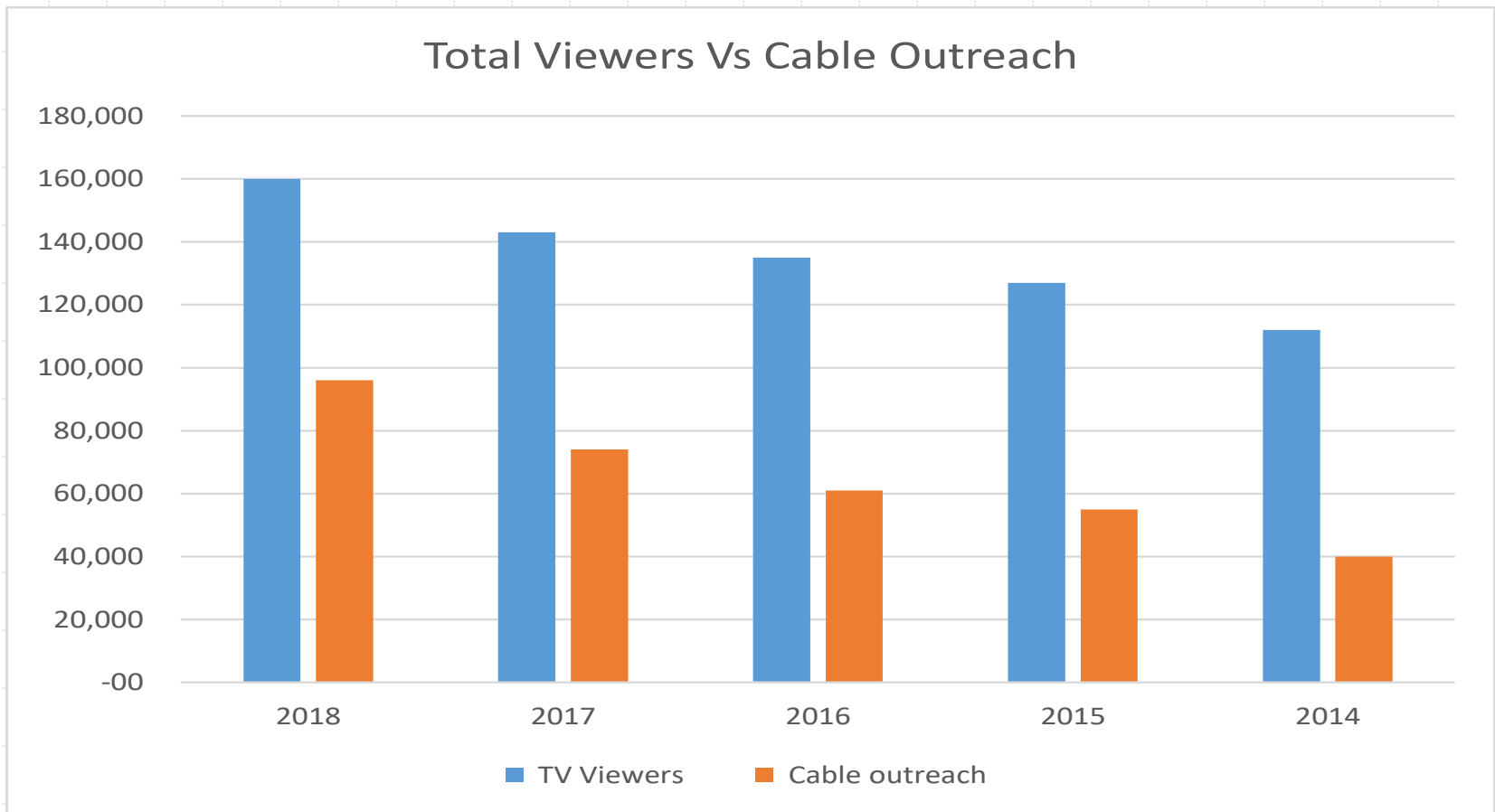
Current Status

- ◆ Total no. of Newspaper & Magazines in Pakistan - more than 400.
- ◆ Total no. of TV channels in Pakistan – more than 129
- ◆ Total no. of FM radio stations in Pakistan - more than 180

Media Industry

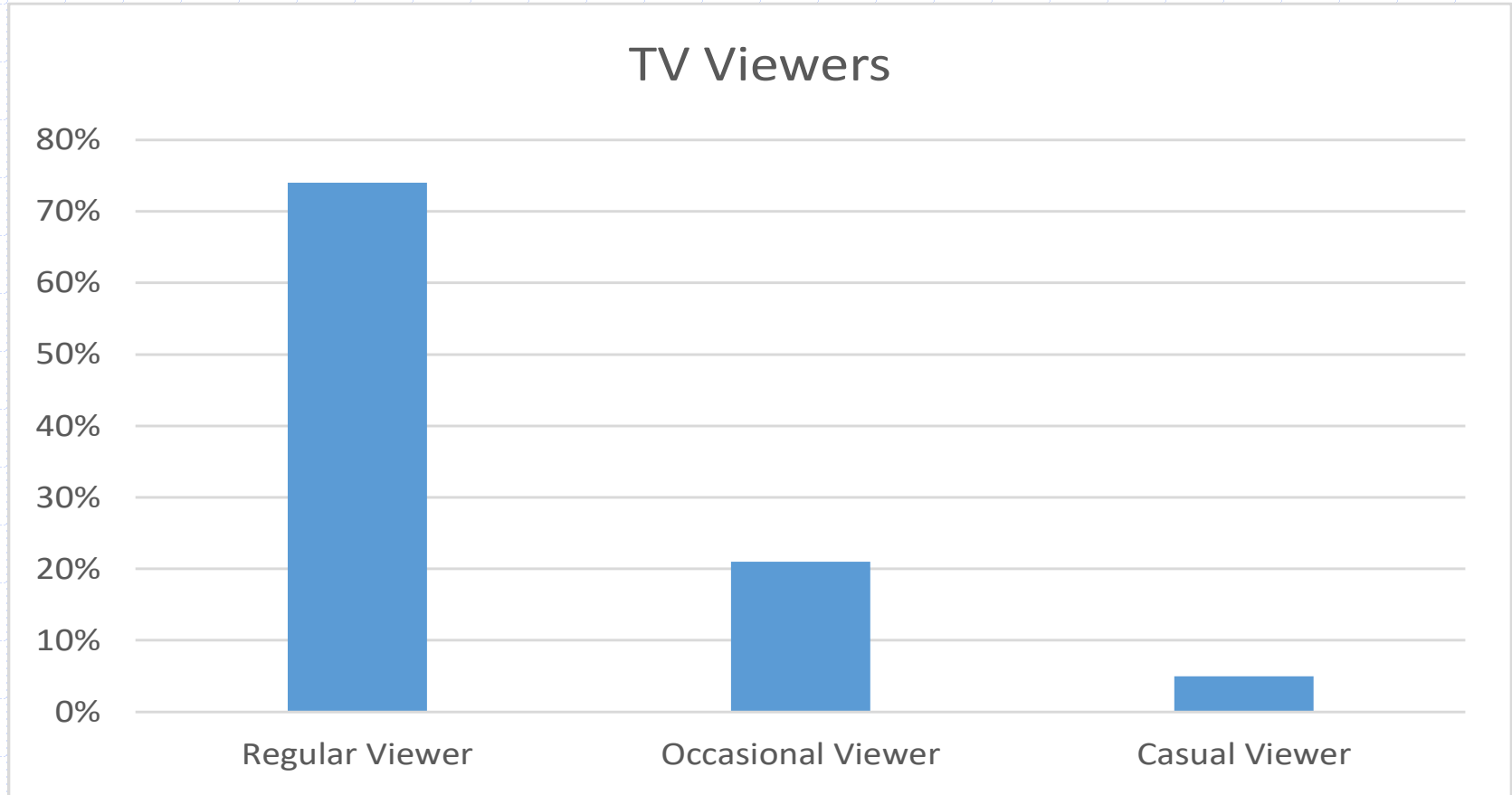
Key Facts

- ❖ Total TV Viewers 160million (75% of total population)
- ❖ Total Cable outreach 96million (60% of total viewership)



There is unprecedented hike in TV Viewers during 2018. As per the market knowledge, this could be attributed to combined counting of mobile viewership and TV viewership in 2018, which might have led to uncalled for hike in the reported viewership number

TV Viewership – Viewing Time

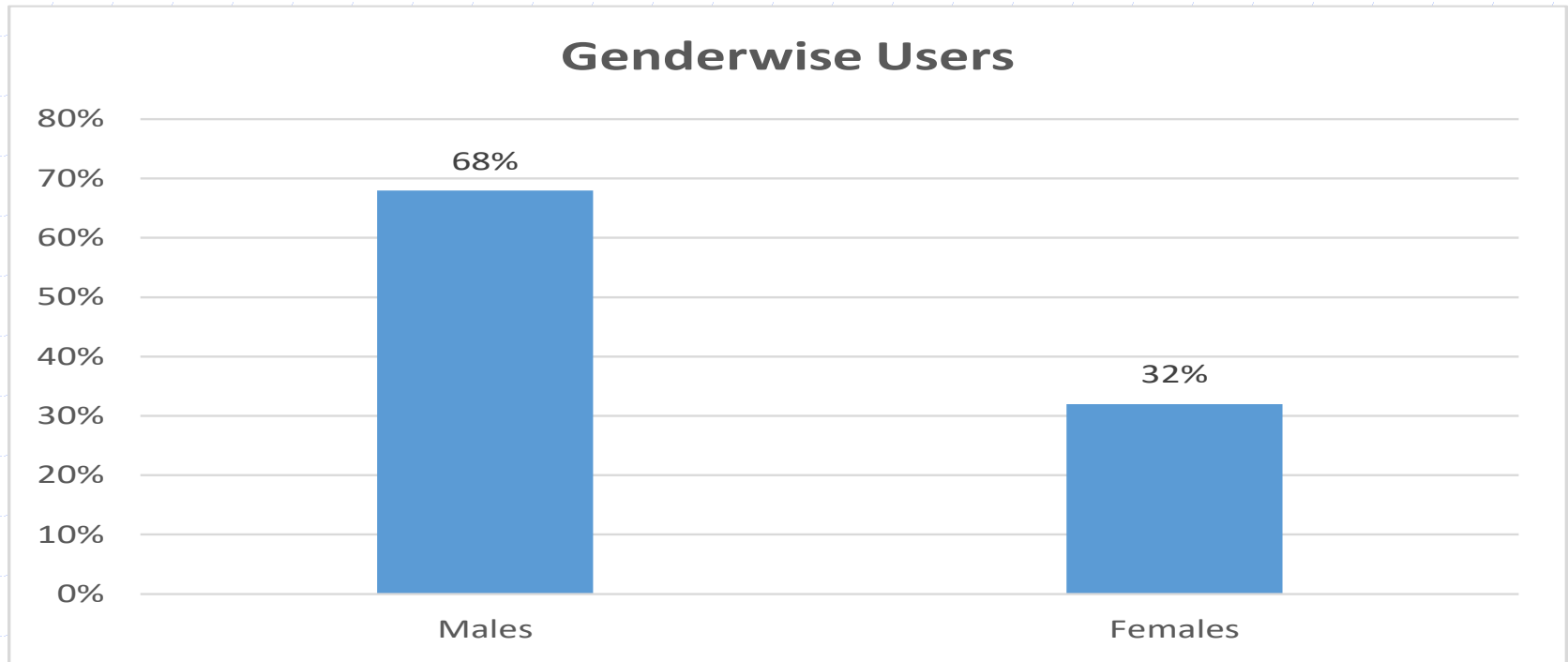


Regular Viewers: More than equal to 480mins / week

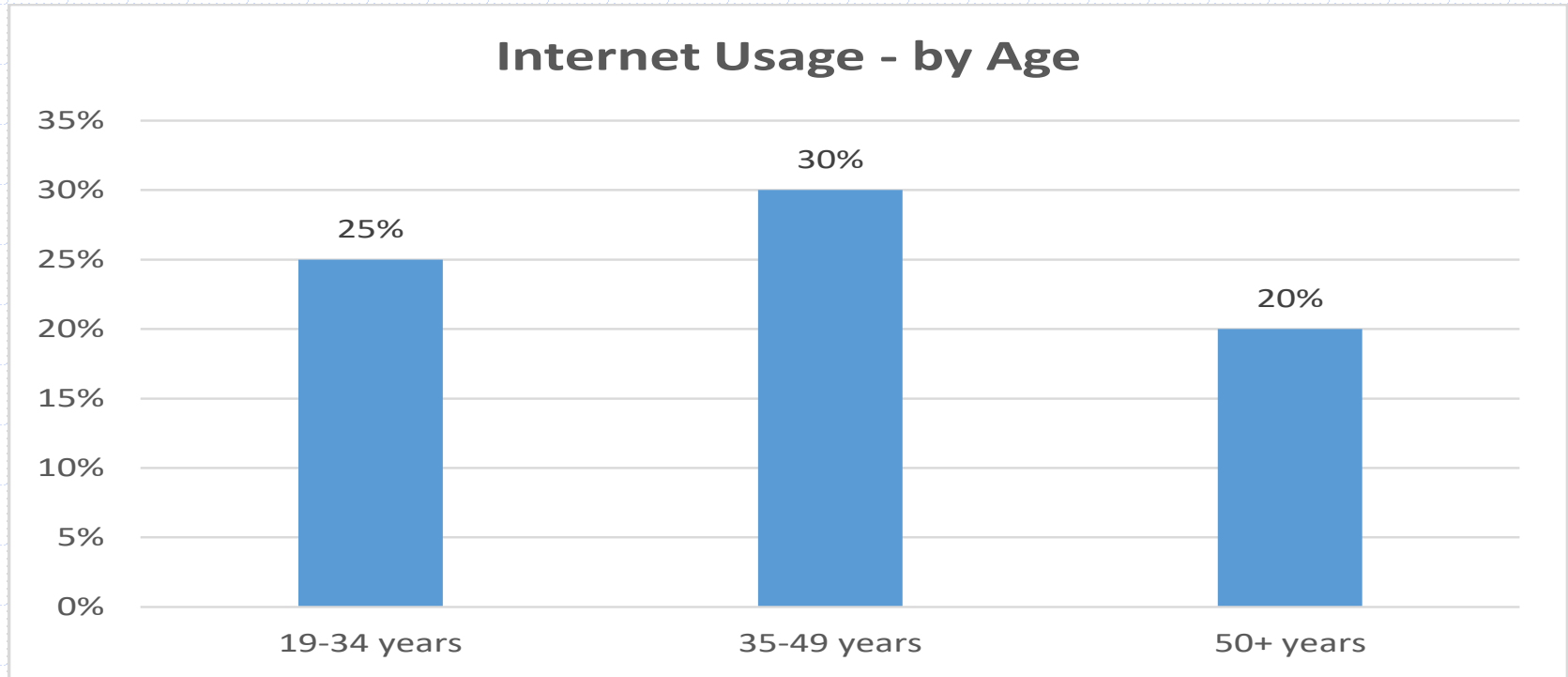
Occasional Viewers: More 240mins but less than 480mins /Week

Casual Viewers: Less 40mins / Week

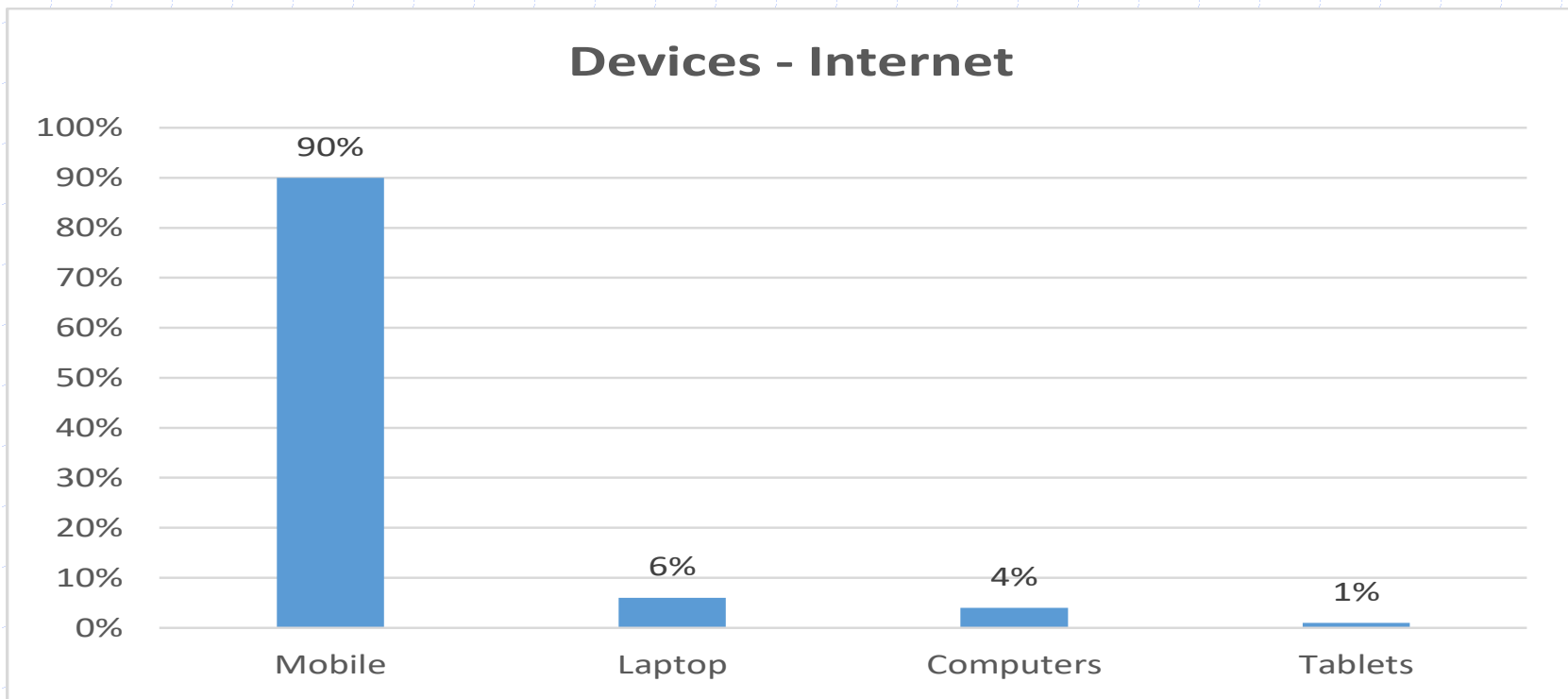
Internet Users – Gender wise



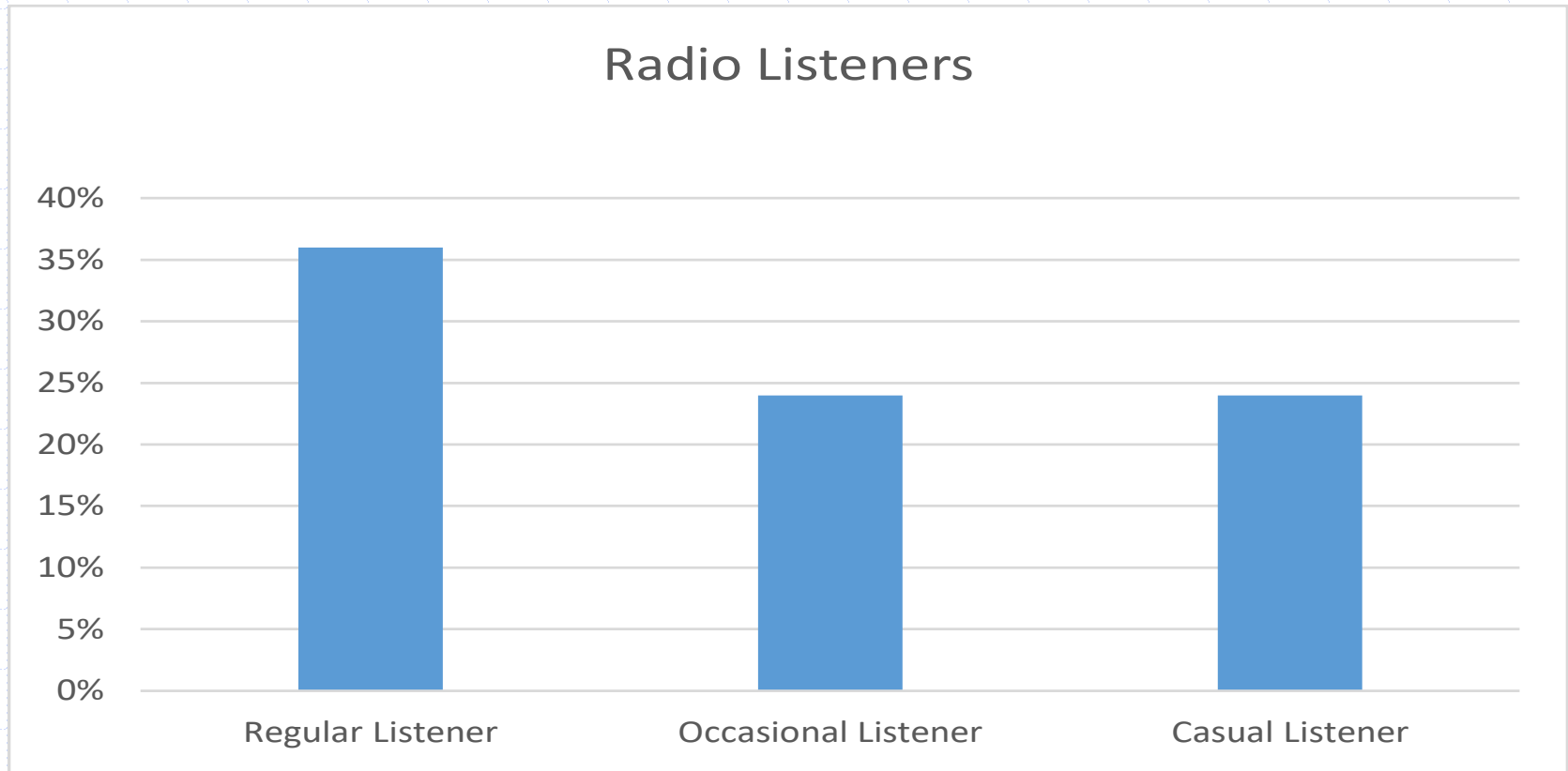
Internet Users – Age wise



Internet Devices



Radio Listeners – Listening Time

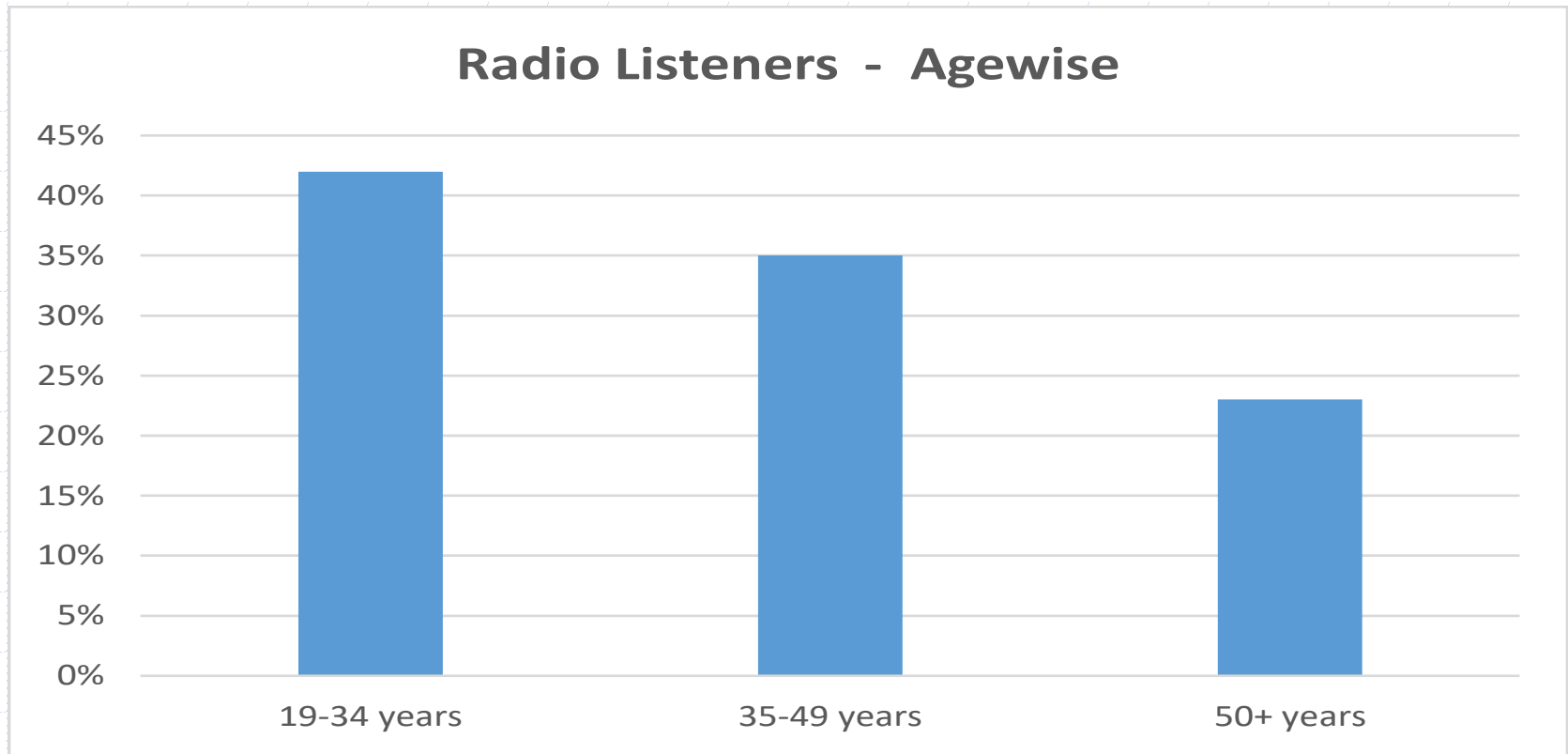


Regular Listeners: More than equal to 180mins / week

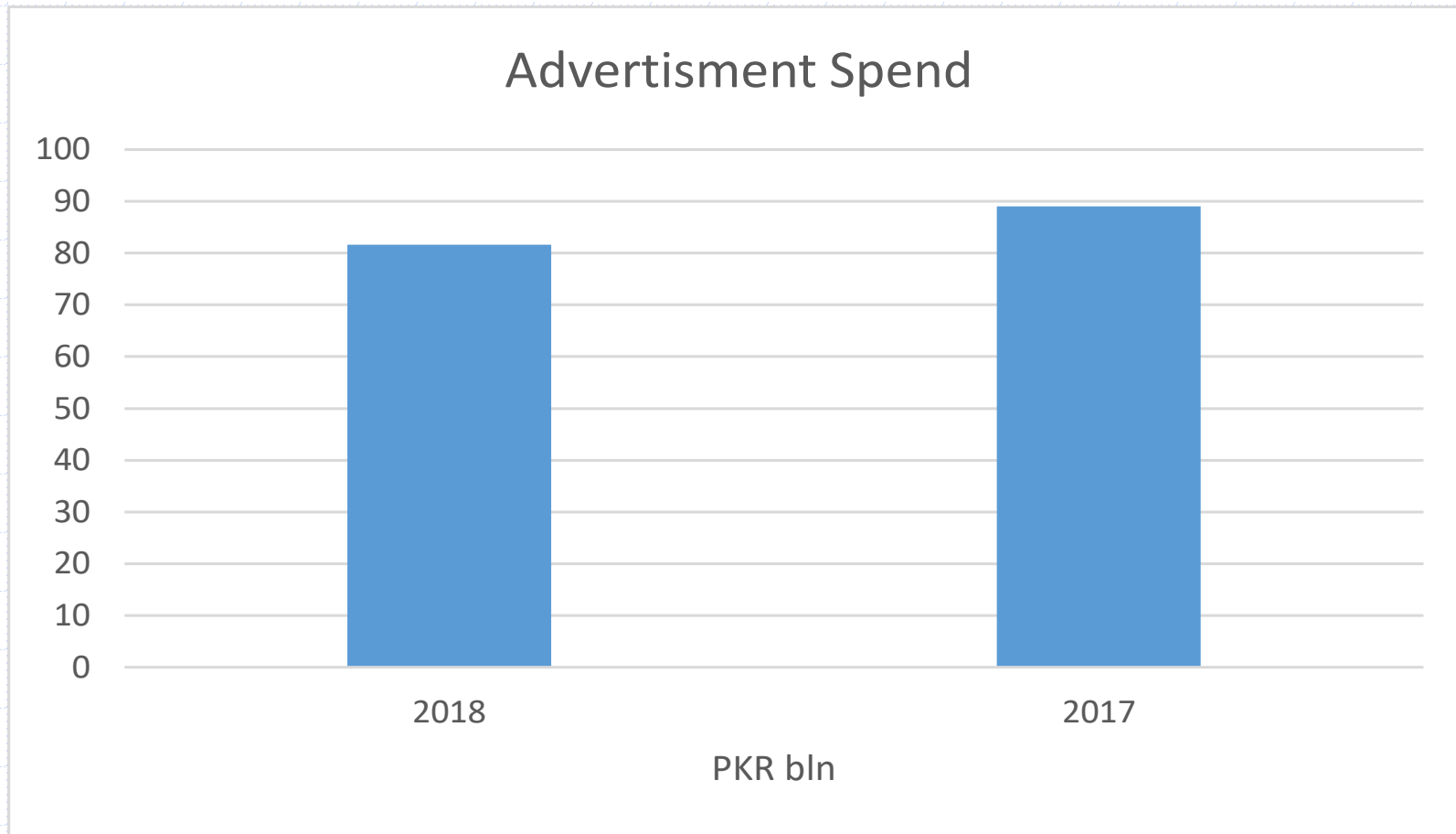
Occasional Listeners : More 90mins but less than 170mins /Week

Casual Listeners : Less 90mins / Week

Radio Listeners – Age wise



Advertisement Industry

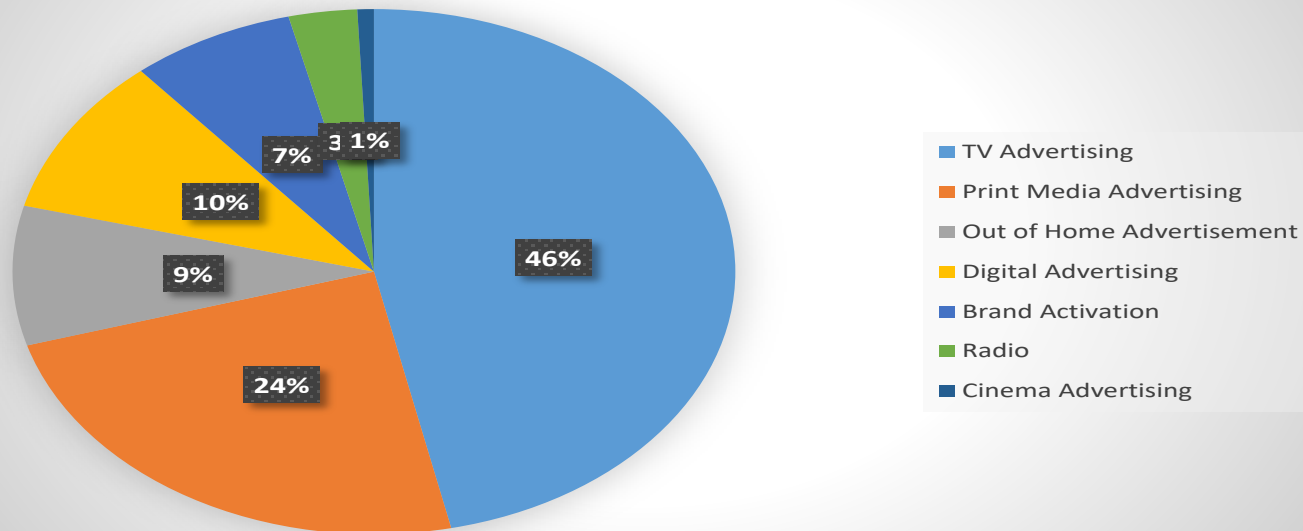


Advertisement Spend – Medium wise

Key Facts

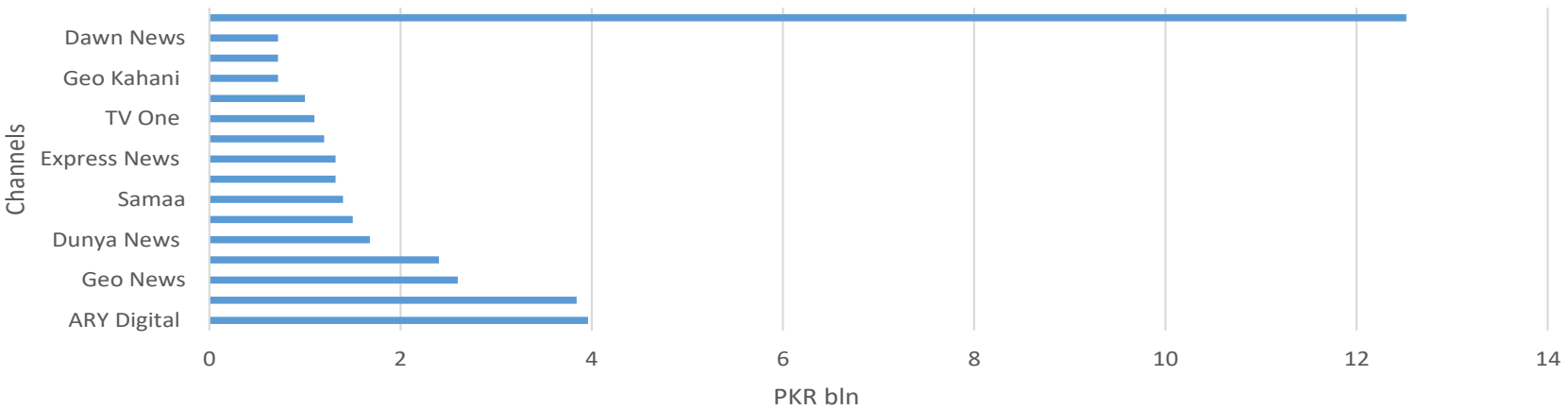
❖ Total Advertising Market	PKR 81.6bln
❖ TV Advertising	PKR 38bln
❖ Print Media Advertising	PKR 19.5bln
❖ Out of Home Advertisement	PKR 7bln
❖ Digital Advertising	PKR 8bln
❖ Brand Activation	PKR 6bln
❖ Radio Advertising	PKR 2.5bln
❖ Cinema Advertising	PKR .6bln

% of Advert Spend

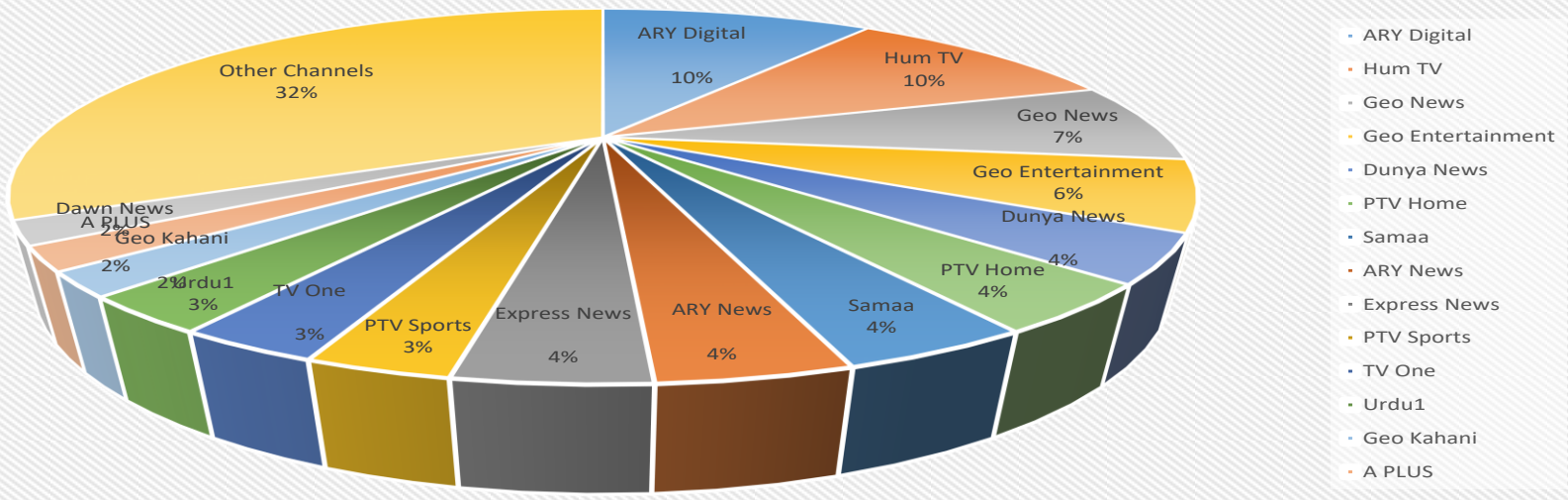


Advertisement Spend – TV

% Amount Spend on TV Adverts

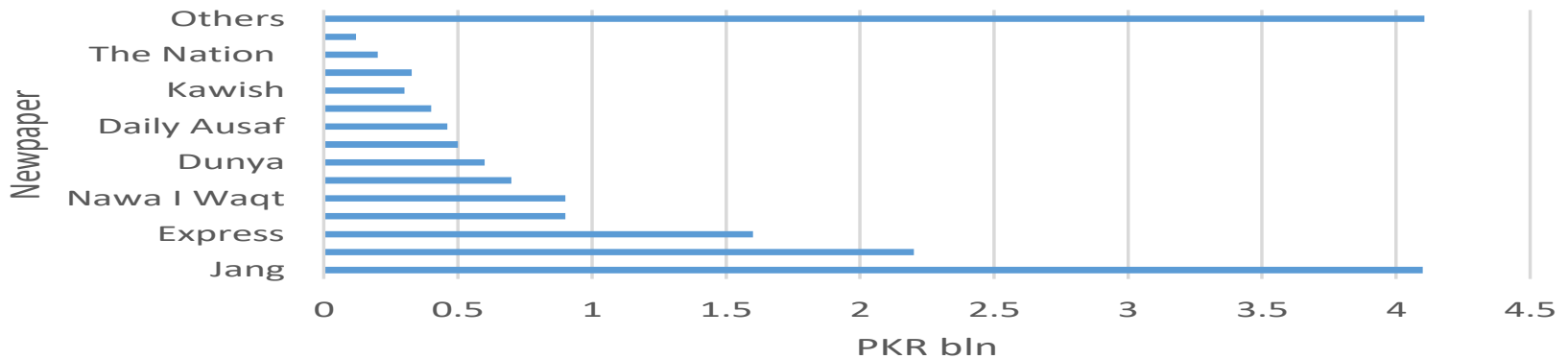


% of TV Advert Spend

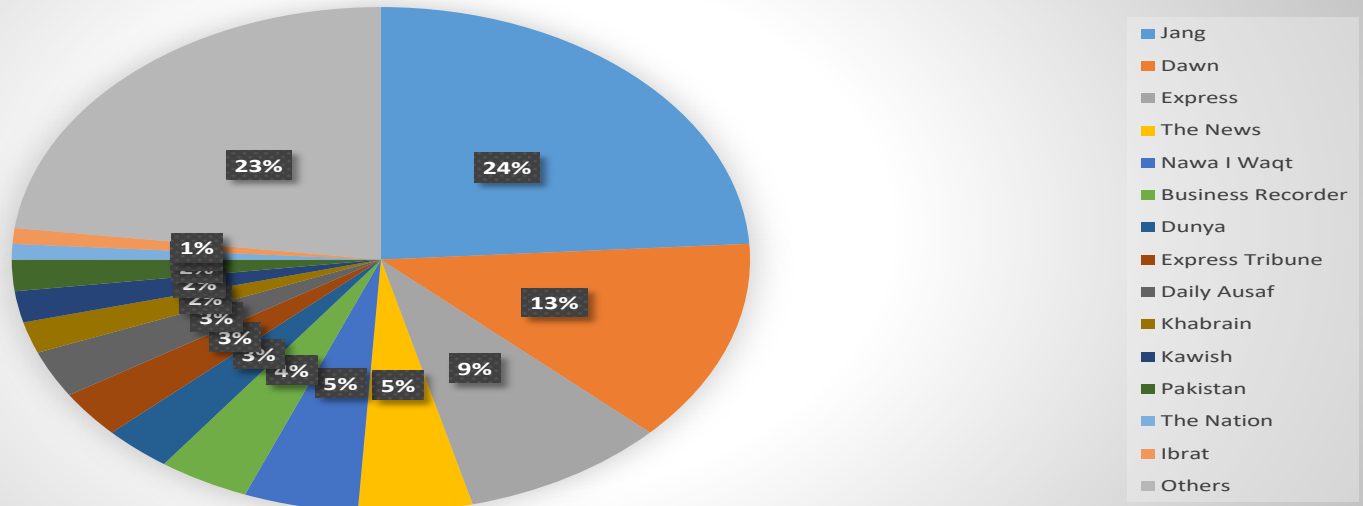


Advertisement Spend – Newspaper

% Amount Spend on Newspaper Adverts

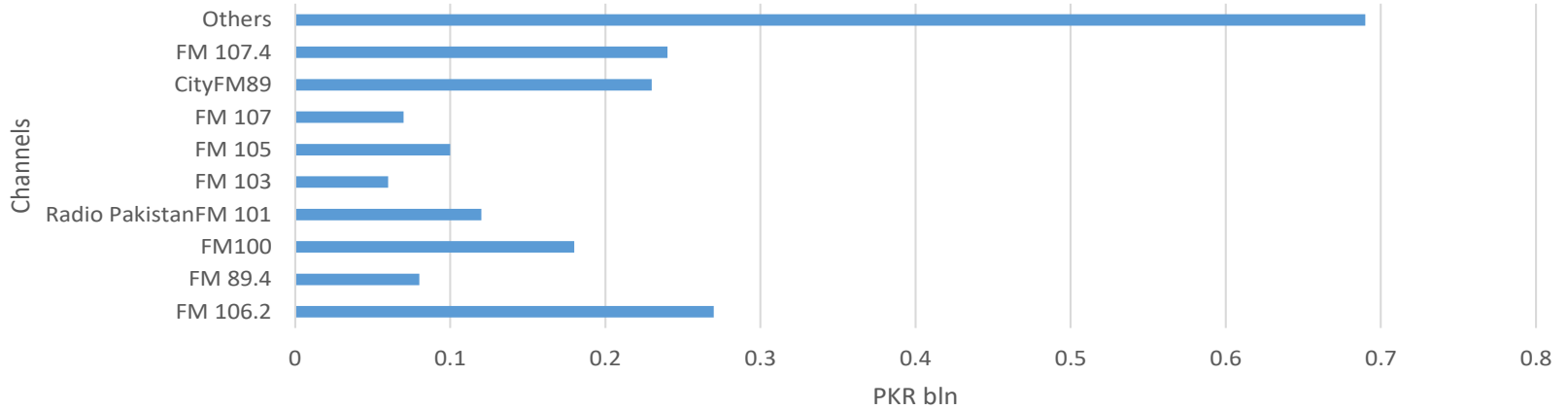


% of NewsPaper Advert Spend

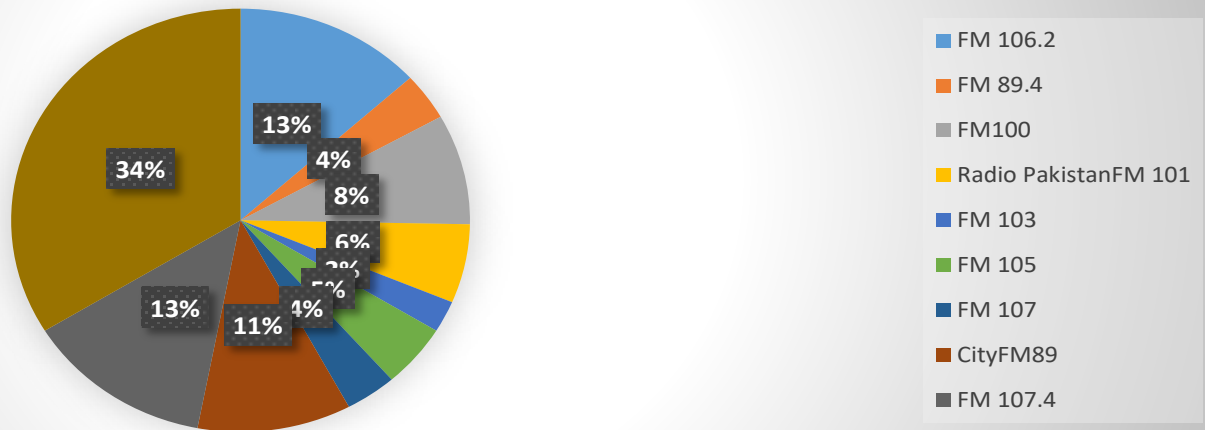


Advertisement Spend – Radio

% Amount Spend on Radio Adverts

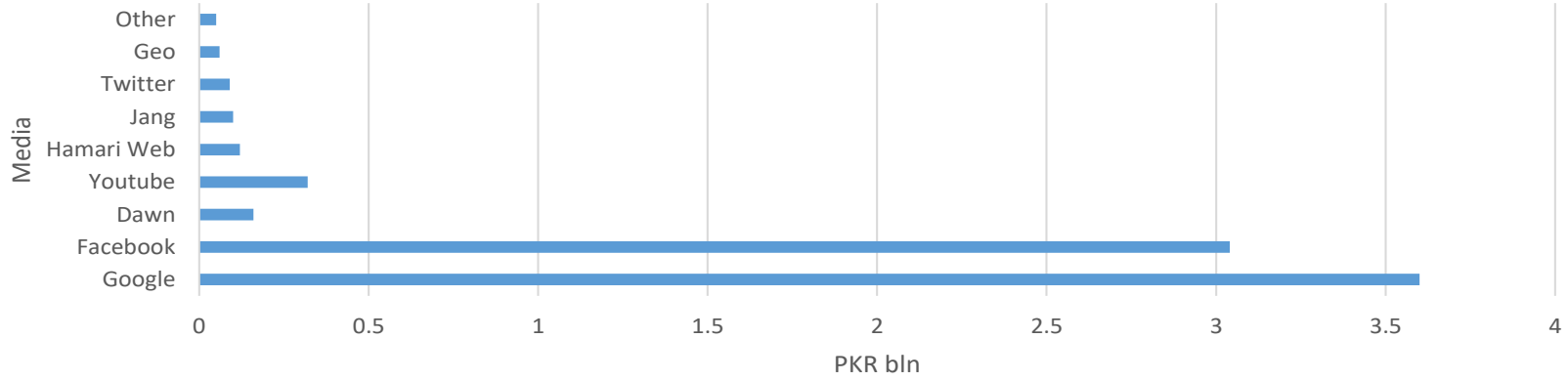


% of Radio Advert Spend



Advertisement Spend – Digital Advert

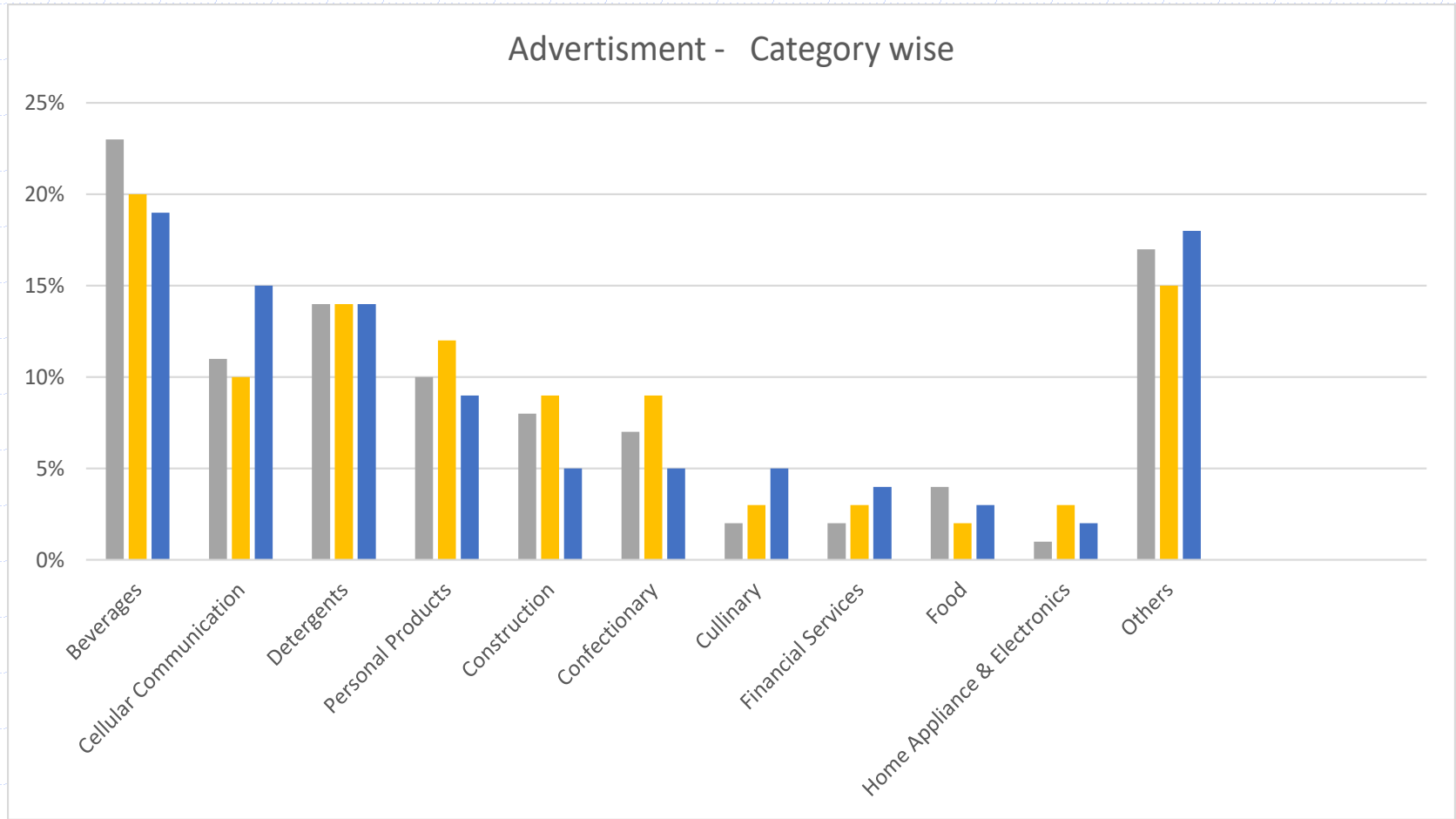
% Amount Spend on Digitald Adverts



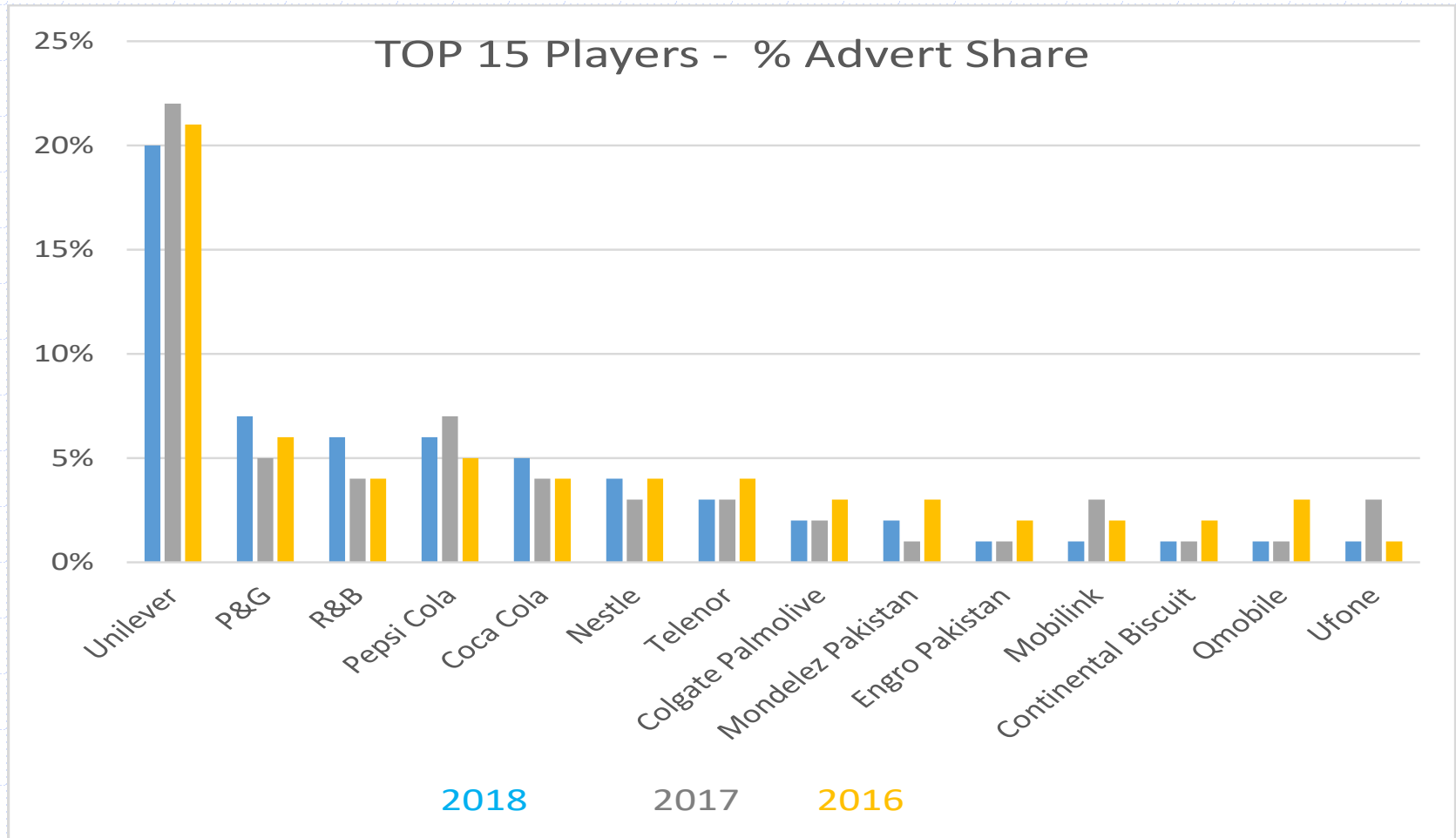
% of Digital Advert Spend



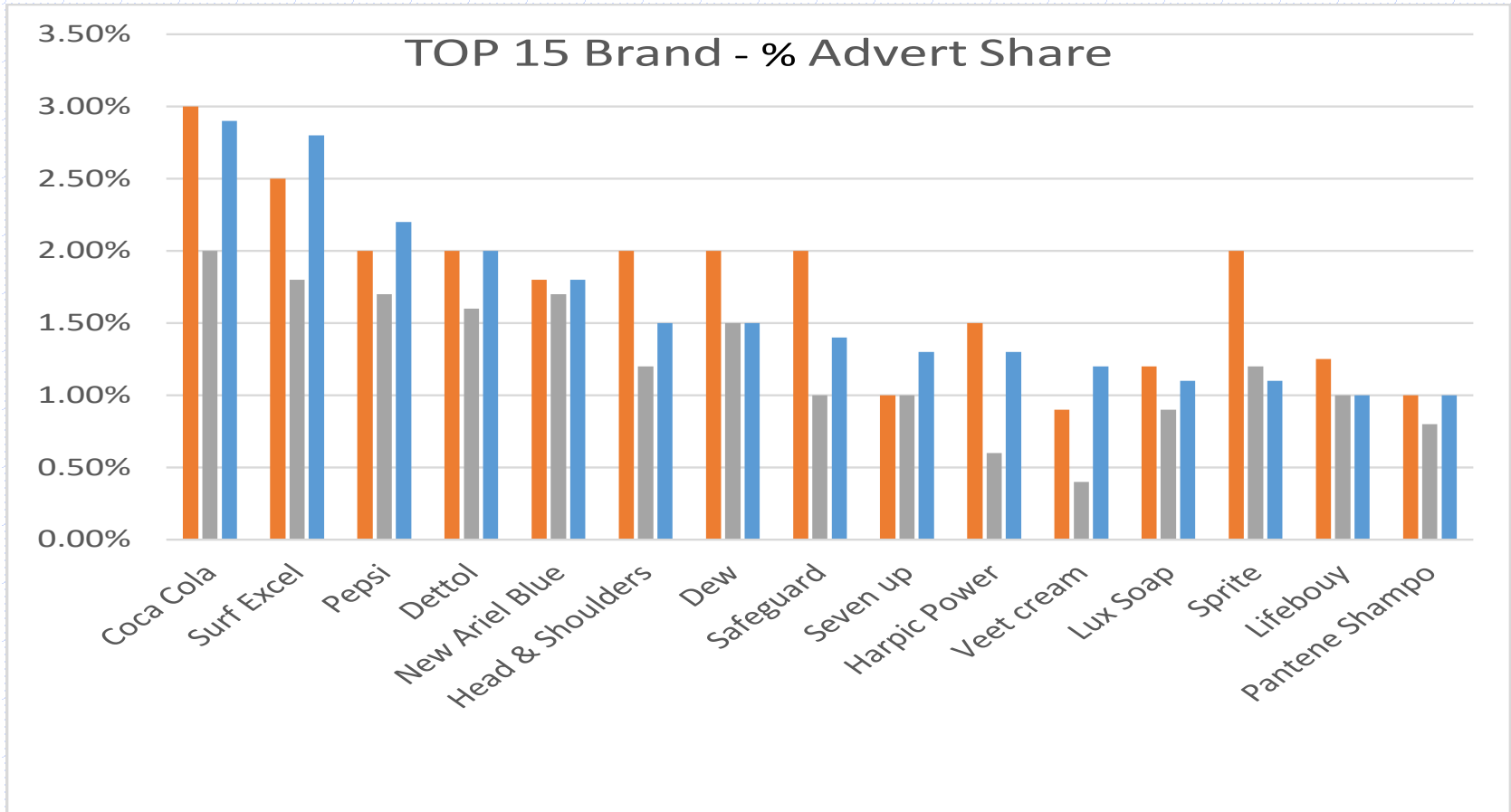
Advertisements – Sector wise



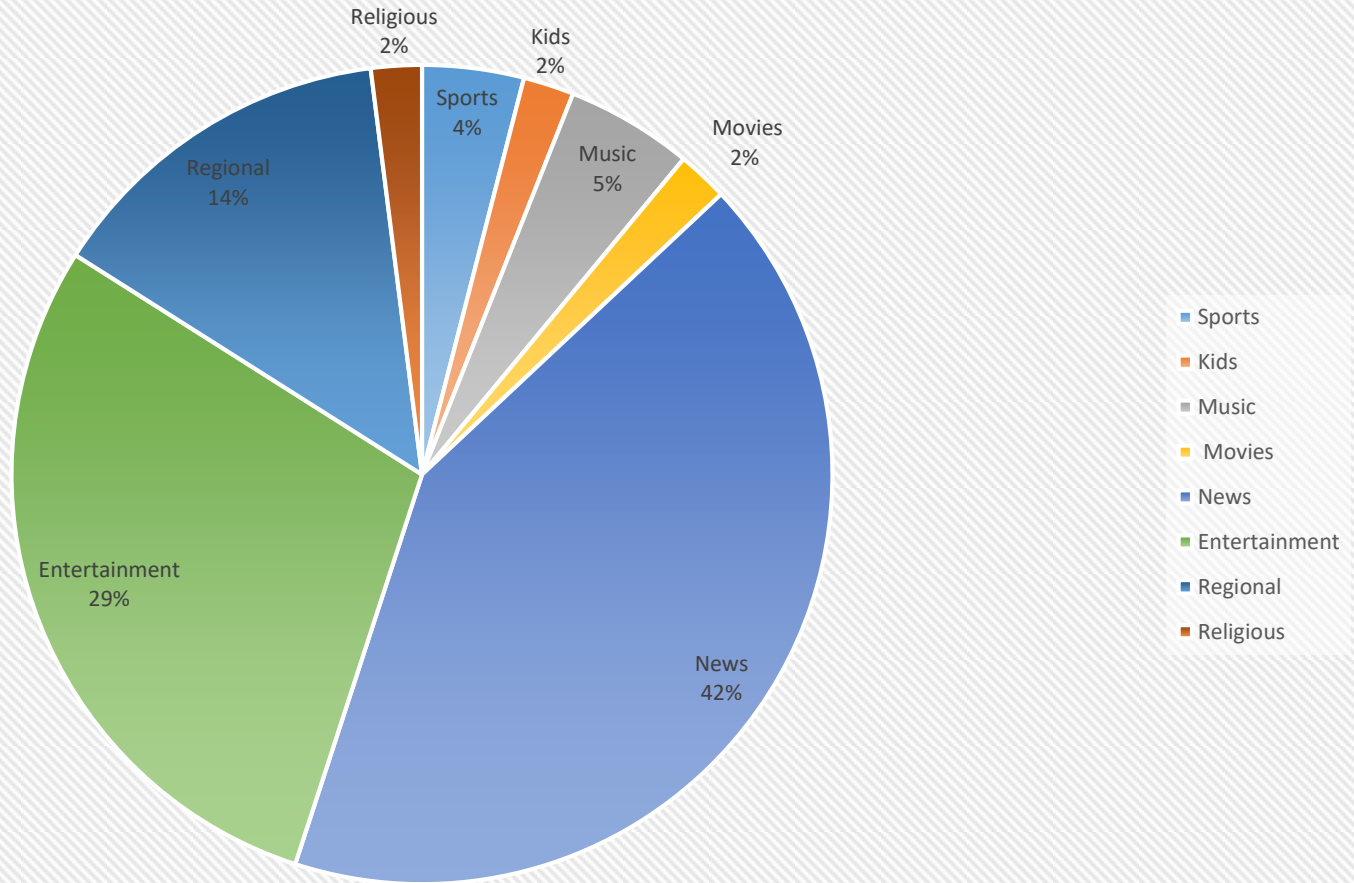
Advertisements – Company wise



Advertisements – Brand wise



Advertisements – Genre wise



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.

Risks

1. Rapid Emergence of Mobile TV due to 3G/4G
2. Emergence of Streaming sites like Such.TV, Baghi.TV etc.
3. Regulatory Risk
4. Online Channels
5. Online Advertisements
6. Blogs/Video blogs
7. Controlled Freedom of Speech

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