



# PAKISTAN

## Media Landscape Guide

MARCH 2022



## Preface

This guide is one of a series of Media Landscape Guides which map the media landscape in different countries. The guides have been produced by the CDAC Network in cooperation with DW Akademie and supported by the Federal Ministry for Economic Cooperation and Development. This project is part of the global initiative “Transparency and media freedom - Crisis resilience in the pandemic”.

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Take a look at all of CDAC's Media Landscape Guides, available in multiple languages, here: <https://www.cdacnetwork.org/media-landscape-guides>

*This Media Landscape Guide was written and edited between April and October 2021.*

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## SECTION I:

# Introduction

## 1.1 About the guide

This Media Landscape Guide provides a snapshot of the media in Pakistan, including the audiences, the producers, the preferences of different groups in the community, the communications culture, and the languages associated with the media. It gives an insight into the role of media in development work, crisis preparedness, recent disasters, and the (at time of writing<sup>1</sup>) ongoing COVID-19 response. The guide also gives an overview of each media sector including, digital and social media, radio, television, print and other traditional forms of mass communication.

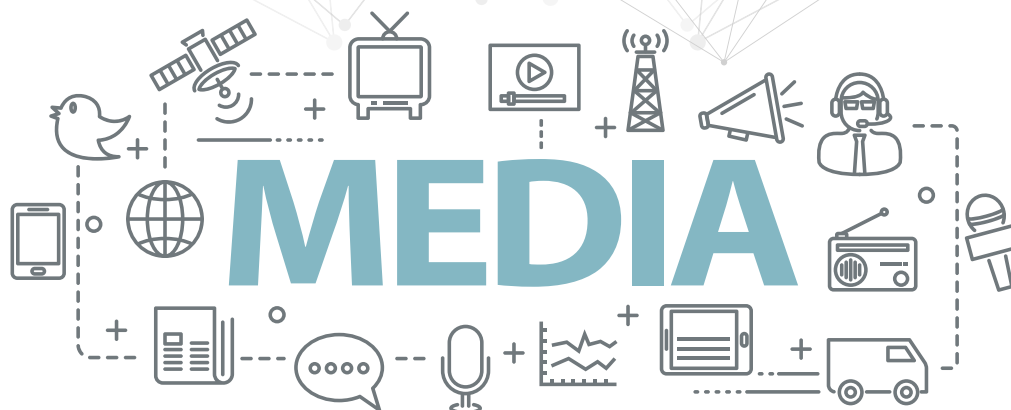
It should be noted that with the constantly changing nature of the media landscape, this is not a comprehensive overview of all media outlets and platforms but rather a snapshot summary of those most relevant at the time of writing.

The guide has been written as an introduction to help organisations and individuals engage with media in their work. For example, it can be used by:

- » Community, development, and humanitarian organisations; government and local authorities; non-government organisations (NGOs) and UN relief agencies to work with the media on community engagement, communication, outreach, and messaging and mobilisation.
- » Development workers building societal resilience to disasters by working with media in disaster preparedness.
- » Relief workers using media to engage communities to work together in early recovery from crises.
- » Media outlets (including news outlets): to improve their communication and engagement with different groups, particularly during disasters.
- » Media Development Organisations: to inform advocacy and capacity-building work to improve people's access to quality information and further development goals through better outreach.

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<sup>1</sup> April to November 2021



## 1.2 What does the guide cover and why it is needed

Without an understanding of how a society communicates, any communication efforts may struggle and potentially miss large numbers of those for which those efforts are intended. This can cause difficulties when attempting to work with the community in a development project; in an emergency, it could be even worse, as an incoming relief operation may not have time to carry out audience research before communicating vital information, without which communication may use the wrong channels and miss those who need it. However, by engaging media in a country, you are engaging vital partners who know the communications landscape of any given country well and have the means by which to effectively disseminate information.

The aim of this guide is to act as a starting point for communicators, indicating the most effective media to use to communicate with different demographics. Many existing resources for identifying media users and audiences in Pakistan are either out of date or limited in scope: this guide will help identify which media is operable at the time of writing and so help facilitate the communication of reliable, trusted and timely information, helping to make the media part of the solution in a humanitarian response.

## 1.3 Methodology

Research for the guide was carried out in-country and aided by an in-country reference group who provided guidance, expert advice, and quality assurance. Information and data were collected through a detailed desk review and interviews. Interviews were carried out with media organisations, media experts and academic researchers, government officials, media staff (including producers and journalists), humanitarian agencies, UN agencies, and NGOs.

## 1.4 Potential role of the guide in disasters

Effective, consistent, and timely communication is vital in humanitarian response and in building sustainable early recovery from crises. Communities, authorities, and responders must be kept informed of the situation of any disaster and planned response, and of any actions they need to take. Proactive communication to dispel rumours or misinformation is vital, as is the building of trust with audiences, which can be facilitated through developing mechanisms for two-way communication. The media can also play a proactive role in early warning which can influence population and response behaviour and potentially mitigate the effects of a disaster.

In aid responses and disaster preparedness it is important to know how best to use media to reach marginalised groups, with considerations of literacy levels and language preferences. It is also important to be aware of, and to address, any enhanced needs, risks, and information gaps. Good communication requires creative thinking, adapting communication tools, message formats. Working with existing media professionals can help to achieve this.

This guide is intended to help practitioners improve their communication, particularly during humanitarian responses – whether they work in the media or are using it to reach affected communities. The goal is for it to be used to improve communications, messaging and information dissemination and contribute to an effective response.



PHOTO: JONATHAN BROOKER-SOLIDARITES INTERNATIONAL

## SECTION 2:

# Overview Of Communications Culture

THIS SECTION OUTLINES THE CURRENT STATE OF THE MEDIA LANDSCAPE IN PAKISTAN AND HOW IT CATERES TO DIFFERENT GROUPS. IT ALSO LOOKS AT MEDIA PREFERENCES AND ACCESS, AND THE BARRIERS PEOPLE FACE IN RECEIVING THE INFORMATION THEY NEED.

## 2.1 Communications Culture

There has been huge growth in the media sector since the ending of the government's monopoly over radio and television in 2002 and the establishment of the Pakistan Electronic Media Regulatory Authority (PEMRA). Prior to this, the state-owned Pakistan Television, and public-owned Radio Pakistan, dominated the landscape, along with print media. PEMRA was established to: "improve the standard of information, education, and entertainment". The body is the licensing authority for all private TV and radio channels in the country and is also responsible for regulating TV and radio content through a code of conduct.<sup>2</sup> A vast majority of programming on television and radio is produced locally because of PEMRA's requirement of licensees to air a "diversified mixture of programmes with not less than 90 percent share of indigenous Pakistani-origin programmes". There are also examples of global outlets partnering with local television channels to broadcast content, however, some of these partnerships are reported to have ended due to regulatory issues.<sup>3</sup>

Despite the proliferation of radio and news channels, the government has retained huge influence over these mediums through restricting access to broadcast mechanisms. It does not allow private TV channels to broadcast via terrestrial networks, restricting them to cable and satellite. State channels, meanwhile, can broadcast across cable, satellite and terrestrial. This limits the audience of private broadcasters to viewers with access to cable and satellite and means low-income and more rural communities are less likely to be reached. There are also differences between state and private radio stations. The government only issues private licenses for broadcasts on the FM frequency for radio, while the government can broadcast via FM and the AM frequency. FM broadcast licenses do not allow private radio stations to broadcast their own news content, instead these channels relay bulletins from state-run stations, and other services such as BBC Urdu. Conversely though, private TV channels can broadcast their own current affairs and news content.

<sup>2</sup> [https://pemra.gov.pk/uploads/legal/Code\\_of\\_Conduct.pdf](https://pemra.gov.pk/uploads/legal/Code_of_Conduct.pdf)

<sup>3</sup> <https://www.dawn.com/news/1601847>



## 2.2 Changes In Media Share

Government paid advertising is a key source of revenue for many outlets across mediums, especially for regional newspapers, which are in some cases solely dependent on government ads. The reach of mass-circulation press is shrinking amid the growth of TV and Radio. However, TV and Radio as well as print media are now challenged by the rise in popularity of digital media. Recent studies suggest print and broadcast media faces a steady decline in its ability to disseminate information, due to the growth of free online content available through the internet.<sup>4</sup> Television viewership has been declining with the Aurora review reporting a “5% decrease in television viewership in FY2017-18, and a 10% decrease compared to FY 2015-16”. However, this trend does not necessarily translate into television content losing popularity as people could be watching on smartphones and mobile devices. People are accessing television news in new ways - social media outlets of leading television news channels are generating anywhere from 100 million to 200 million hits a month through Facebook alone.

**PRESS FREEDOM:** In 2021, Reporters without Borders (RSF) ranked Pakistan 145th out of 180 countries for media freedom. In their summary they note that Pakistani media have become a target for the country’s ‘establishment’. Censorship is frequent, advertising is sometimes threatened with withdrawal, distribution of newspapers can be interrupted, and TV channels jammed. Online regulation, or censorship has increased. A phenomenon of cyber-harassment campaigns against journalists, especially women journalists is emerging. Several journalists were abducted in 2020 and reporters continue to be at risk in the field, especially in the western provinces of Baluchistan and Khyber Pakhtunkhwa.<sup>5</sup>

The European Journalism Centre (EJC), in the Media Landscapes for Pakistan note that there have been threats and work-related violence towards media practitioners and intimidation and attacks on media organisations offices. This has contributed to an environment of self-censorship and cautiousness. Pakistan has a long history of arbitrarily suspending social media platforms. Such suspensions are mainly directed towards platforms that are popular with the lower-middle class, including PUBG, and TikTok (banned four times in recent months including at the time of writing of this report).<sup>6</sup>

The role of PEMRA has been questioned by scholars and media development professionals. There have been criticisms that it has allowed major media groups to sustain a monopoly through large investments and failed to exercise its authority to stop cross media ownership.<sup>7,8</sup>

**MEDIA ACCESS:** There is a gulf between rural and urban areas in terms of internet access, with reports suggesting 35% of Pakistan, mainly rural areas, is without internet infrastructure.<sup>9</sup> Pakistan has been ranked 111th on the Network Readiness Index (NRI), lower than most of its South Asian peers.<sup>10</sup> The mobile phone is the main form of digital connection. This is partly due to the sheer volume of mobile phone subscribers. According to GSMA data, in 2019, 67% of total mobile Internet subscribers had only accessed the Internet using mobile phone devices.<sup>11</sup> Widening network coverage and the increasing adoption of smartphones has helped to bring mobile internet services to people across the country. It is not clear why levels of social network penetration are low, but this may be partially due to the blocking of social media sites such as Facebook.

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4 <https://digitalcommons.unl.edu/cgi/viewcontent.cgi?article=9394&context=libphilprac>

5 <https://rsf.org/en/pakistan> see RSF's 2021 World Press Freedom Index. Published annually, the Index measure the level of freedom available to the media with 1 the freest. It provides information about advances and declines in respect for media freedom in 180 countries. It is used by the World Bank to evaluate a country's respect for the rule of law.

6 <https://www.digitalrightsmonitor.pk/tiktok-banned-for-the-fourth-time-by-pta/>

7 <https://www.dawn.com/news/1620974>

8 <https://www.econstor.eu/bitstream/10419/52359/1/673080374.pdf>

9 <https://www.borgenmagazine.com/internet-access-in-pakistan/>

10 <https://networkreadinessindex.org/wp-content/uploads/2020/12/Pakistan.pdf>

11 <https://www.gsma.com/asia-pacific/wp-content/uploads/2020/06/24253-Pakistan-report-updates-LR.pdf>

### Data from DataReportal show that in January 2021:<sup>12</sup>

- » Pakistan has a population of 223 million, with 48.5% female and 51.5 male
- » Urban dwellers make up 37.3% of the population, 62.7% live in rural areas
- » Internet penetration stands at 27.5% and there 61.34 million internet users (+21% since 2020)
- » There are 46 million social media users (+24% since 2020), equivalent to 20.6% of the total population.
- » There were 173.2 million mobile connections, equivalent to 77.7% of the total population.

### According to the International Telecommunication Union (ITU), the United Nations specialised agency for Information and Communication Technologies (ICTs) in 2020 in Pakistan:

- » Mobile cellular coverage was 89% (2020).
- » The population covered by at least a 3G mobile network was 77%, and by at least a 4G mobile network was 69% (2020).
- » The percentage of households with internet access at home was 34%, with 14% having a computer at home (2019). In 2016 34% urban households had internet access at home compared to 15% of rural households.
- » In 2019 Mobile ownership was between the range of 45% - 26% for females, and 65% for males.

### Key Data From ITU Is Summarised Below:

Figure 1: Communication Infrastructure at a glance from ITU data 2020<sup>13</sup>

Service	Fixed-line telephone	Mobile cellular	Mobile broadband	Broadband-fixed
Number of connections	2,876,794	175,624,364	90,504,754	2,423,057
Per 100 inhabitants	1	80	41	1

**INTERNET AND SOCIAL MEDIA:** This is a fast-moving area due to the rapidly increasing Internet footprint in most rural and semi-urban areas, the competitive costs of Internet packages, the influx of much more affordable mobile phones, and the popularity of social media platforms that allow the users to communicate via visual content, including, but not limited to, TikTok. Despite stringent government regulations, these platforms continue to be popular and are sometimes used as a medium for political news and criticism, amongst other uses.<sup>14</sup>

**TELEVISION:** There is a lack of current accurate data on television ownership but estimates from studies show that nearly 65% of the population has either direct or communal access to television. Gallup Pakistan research shows that at the end of 2018, on average, a Pakistani television viewer spent 1.92 hours a day watching television (2.1 hours in urban areas and 1.82 hours in rural).<sup>15</sup>

**RADIO:** Although radio has an important role in Pakistan's media landscape, both in rural and urban areas, its popularity is declining and it is evolving onto online formats such as live podcasts which are relayed through Facebook Live or other digital platforms. In most low-income rural areas, broadcast radio is still a popular medium for households, especially for women who either don't have Internet access, or aren't allowed to access the Internet.<sup>16</sup> Radio in urban areas, even in the presence of more popular mediums, is still frequently heard, especially by motorists during rush-hour commuting. A survey-based study looking at FM broadcasts, carried out by Islamabad Traffic Police, found that 71% of 300 drivers surveyed listen only to Islamabad Traffic Police FM Radio (ITP FM) to access information regarding traffic rules, and they mostly listen to it while driving".<sup>17</sup>

**PRINT:** Newspapers in Pakistan have good distribution throughout the country and are published in local languages. Local newspapers often carry hyperlocal news and advertisements, making them very relevant to readers. However, the evolving media environment is now translating into reduced revenue for traditional print journalism, with the print medium in Pakistan losing more than 50% of ad revenue in the past 3 years.<sup>18</sup>

<sup>12</sup> <https://datareportal.com/reports/digital-2021-pakistan>

<sup>13</sup> <https://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx>

<sup>14</sup> <https://www.nytimes.com/2020/10/11/technology/tiktok-pakistan-ban.html>

<sup>15</sup> <https://aurora.dawn.com/news/1143363>

<sup>16</sup> <https://mediamatters.pk/3249-2/>

<sup>17</sup> <https://gmcrjournal.com/papers/hiZHmj8Mpl.pdf>

<sup>18</sup> [https://aurora.dawn.com/news/1143946?fbclid=IwAR2Lfp4g0CtDq-Hl0jt3yRr6MdGwYrqzklvHc8OCu\\_y6wmPw0ClqR9vss](https://aurora.dawn.com/news/1143946?fbclid=IwAR2Lfp4g0CtDq-Hl0jt3yRr6MdGwYrqzklvHc8OCu_y6wmPw0ClqR9vss)



## 2.3 Language And Dialects In The Media

There are between 70-80 languages spoken in Pakistan.<sup>19</sup> Because of this, language can be a barrier to accessing media for many people. Both Urdu and English are official languages. Urdu is the national language, it is the language of the national education system and everyone with a basic level of education has a rudimentary understanding of it. Urdu is used formally in public documents and in government administration. But though it is widely used, it is the first language of only 7.5% of the population overall (20.22% in urban areas). By contrast, Punjab is the first language of 44.15% of the population. English is used in formal communication, education institutions and a small minority of educated people also use it at home. The languages spoken by the ethnic groups, including refugees, near the Afghanistan border are Pashto and Dari. Further details of languages spoken by administrative unit, rural and urban areas are available on the pbs.gov.pk site. A summary of first languages is provided in the table below:<sup>20</sup>

Figure 2: First languages spoken in Pakistan

First Language	Sindhi	Urdu	Saraiki	Pushto	Saraiki	Balochi	Punjabi	other
Population	14.1%	75.7%	10.53	15.42%	10.53%	3.57%	44.15%	4.66

**LANGUAGES USED IN BROADCAST MEDIA:** Regional language media can be found in specific geographic areas and have varying levels of influence. They are mainly used in print and radio and the popularity of these mediums varies across the country. The majority of print content is produced in Urdu (print is more popular in urban areas where people tend to have at least basic knowledge of this language). However, there are also many regional publications in local languages including Pushto, Balochi, Saraiki, and Sindhi as listed by the national newspaper association (APNS).

<sup>21</sup> According to APNS, more than 35 Sindhi language newspapers are listed as registered members. However, there are only 3 Pashto language newspapers listed as registered members of APNS. A popular Pushto newspaper is 'Wahadat' which is read in Peshawar city, Mardan and neighbouring areas, Swat, and other key areas of the province. Wahadat is also widely read in Afghanistan due to cultural similarities. The European Journalism Centre reports that although the readership of the English print media is comparatively small, it is read amongst opinion makers, increasing its influence.

There are a limited number of TV channels broadcasting in languages other than Urdu, which are therefore accessible to minority language speakers in Pakistan. A selection of popular channels is below, in Figure 3.

Figure 3 Regional languages and TV broadcasters viewed in Pakistan

First Language	Sindhi	Pushto	Saraiki	Balochi	Punjabi
<b>Regional TV Broadcasters</b>	KTN News/KTN Kashish TV Sindh TV News/ Sindh TV Mehran TV Awaz TV	Khyber News AVT Khyber Mashriq TV Pushto I Aruj TV [Website not working]	Waseb TV Rohi TV Kook TV	Vsh TV	Punjab TV [website not working] Dharti TV [website not working]

The Radio Pakistan home services provides programming in more than 20 local languages, including the minority languages of Dari and Balochi. Radio Pakistan's External Services broadcast programmes daily in 10 foreign languages including, Dari and Pushto, Sinhali, Farsi and more.<sup>22</sup> In Pakistan's tribal areas, radio remains the main source of news and there are also numerous local FM radio channels in these areas that broadcast programming either fully or partially in Pashto.

Several media organisations report locally from Khyber Pakhtunkhwa province and train Afghan refugees as citizen journalists as part of the DWA project 'Flight and Dialogue South Asia', these are:

- » Power99, commercial radio station with a large reach, which has been broadcasting some Pashto and Dari programmes but has no written or dedicated pages. <https://power99.live/>
- » Tribal News Network (TNN) <https://www.tnn.com.pk/> distributes content in Pashto on Facebook and has several online channels as outlined in the table below:

<sup>19</sup> <https://translatorswithoutborders.org/language-data-for-pakistan>

<sup>20</sup> <https://www.pbs.gov.pk/sites/default/files/tables/POPULATION%20BY%20MOTHER%20TONGUE.pdf>

<sup>21</sup> [https://www.apns.com.pk/member-publication/language\\_wise.php?language=sindhi](https://www.apns.com.pk/member-publication/language_wise.php?language=sindhi)

<sup>22</sup> <http://www.radio.gov.pk>

Figure 4 Tribal News Network online channels

Channel Name	Link	Active since	Number of followers / subscriptions
Tribal News Network –Facebook	<a href="https://www.facebook.com/TNNInfotainment">https://www.facebook.com/TNNInfotainment</a>	2014	460,000 followers
Tribal News TV – Youtube	<a href="https://www.youtube.com/channel/UCSGaEBcM49Li9qGtonnhIFQ">https://www.youtube.com/channel/UCSGaEBcM49Li9qGtonnhIFQ</a>	2019	4,600 followers
Tribal News Network- Youtube	<a href="https://www.youtube.com/channel/UC7tdaKl3JKq\$KhcogyR6w">https://www.youtube.com/channel/UC7tdaKl3JKq\$KhcogyR6w</a>	2015	35,000 followers
@TNNEnglish	<a href="https://twitter.com/TNNEnglish">https://twitter.com/TNNEnglish</a>	2015	6,137 followers
@TNN_Updates	<a href="https://twitter.com/TNN_UPDATES">https://twitter.com/TNN_UPDATES</a>	2017	1,771
Tribal News Network- LinkedIn	<a href="https://www.linkedin.com/company/tribalnewsnetwork/mycompany/">https://www.linkedin.com/company/tribalnewsnetwork/mycompany/</a>	2019	429 followers
Tribal_news_network – Instagram	<a href="https://www.instagram.com/tribal_news_network/">https://www.instagram.com/tribal_news_network/</a>	2021	207 followers
TNN urdu website	<a href="http://www.tnnurdu.com">www.tnnurdu.com</a>	2019	29,300 users
TNN English website	<a href="http://www.tnn.com.pk">www.tnn.com.pk</a>	2014	12,000

BBC World Service remains trusted by audiences in these areas. The BBC Afghan services has TV, radio and online services in Pashto and Dari for audiences in both Afghanistan and Pakistan. BBC Pashto, the Pashto language station of BBC World Service, reaches 50-60 million Pashto speakers in Afghanistan and Pakistan and further afield.

## 2.4 Barriers To Media Access

Patchy internet and unaffordable access for some contributes to a digital divide which has the potential to exclude communities that are already vulnerable. Many rural areas have minimal or no internet access, including areas located in Sindh, Khyber Pakhtunkhwa province, Balochistan, Gilgit Baltistan, and Azad Kashmir. These areas have a history of natural disasters, including flash floods, earthquakes, and landslides. The digital divide has been widened during COVID-19 when conventional education and some jobs moved online, limiting access for many people.<sup>23</sup>

There is a considerable disparity in mobile ownership and usage in Pakistan, partly because of income and partly because of differences in education and access between men and women. The cost of owning and operating an Internet enabled smartphone is out of reach for many due to handset costs, network surcharges, import duties and taxes.<sup>24</sup> Given that social media is primarily accessed via mobile devices, large numbers are excluded. A recent study on the gender digital divide during COVID-19 found that 6 out of 10 women respondents face some kind of restrictions (mostly from their families) when accessing the Internet. Ten out of the 215 women respondents said they use the internet every day, while 2 in 10 said they did not use it at all. The internet was felt to be expensive with 76% giving an opinion or perception that it was beyond the reach of the average person. Mobile appears to be the main way in which women access the internet; of the women respondents who use the internet, 88% saying they access it through their own devices and 78% of those via mobile phones. The need to use the internet increased during COVID-19, yet it became more difficult to access, as many women, who previously accessed the internet outside of their homes, were unable to do so due to restrictions during the pandemic.<sup>25</sup>

Levels of literacy and language are also constructing access to the media. The Pakistan Social and Living Standards Measurement (2019-20) has estimated the literacy rate in Pakistan to be 60%. Literacy rates are higher in urban areas (74%) than in rural areas (52%), with notable variations between regions.<sup>26</sup>

Specifically, regarding literacy rates and media access, a consumer survey assessing the challenges to mobile Internet usage in 2016 revealed that 43% of respondents had “trouble reading”, and 37% respondents had “trouble understanding how to use mobile handsets”. Another 27% of respondents indicated that the lack of availability of content in their language is a barrier for them.<sup>27</sup> Low literacy rates are one of the key reasons visual mediums are popular in Pakistan, with newspapers having only a fraction of their reach. It is essential to address the need for relevant local language content, gender and rural/urban imbalances and digital literacy rates when providing media access to information. In contrast to the low level of access in rural or marginalised areas, those living in semi-urban and urban areas can be considered have reasonable access to digital media, many operated by independently managed and owned media entities.

23 <https://www.borgenmagazine.com/internet-access-in-pakistan/>

24 <https://www.gsma.com/asia-pacific/wp-content/uploads/2020/06/24253-Pakistan-report-updates-LR.pdf>

25 <https://www.digitalrightsmonitor.pk/wp-content/uploads/2021/01/Women-Disconnected-Gender-Digital-Divide-in-Pakistan.pdf>

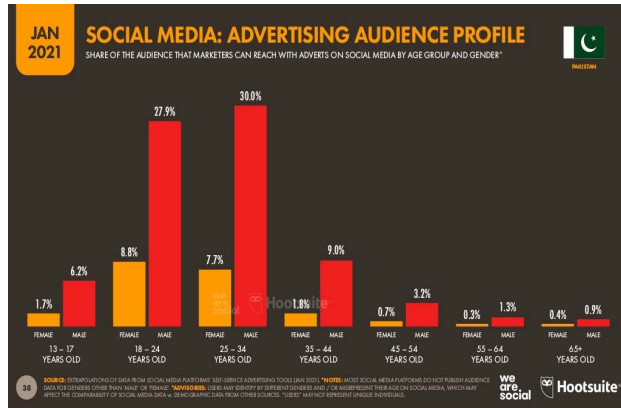
26 [https://www.pbs.gov.pk/sites/default/files/pslm/publications/pslm\\_district\\_2019-20/PSLM\\_2019\\_20.District\\_Level.pdf](https://www.pbs.gov.pk/sites/default/files/pslm/publications/pslm_district_2019-20/PSLM_2019_20.District_Level.pdf)

27 [https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/12/Country-Overview\\_Pakistan\\_Digital-Future.pdf](https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/12/Country-Overview_Pakistan_Digital-Future.pdf)

## 2.5 Media preferences and trusted media

Pakistan's youthful demographic and the increasing access to the Internet has led to a massive take-up of digital media in the country. Sixty four percent of Pakistan's population is under 30 years of age.<sup>28</sup> There is a large difference between the use of social media by men and women. YouTube, for example, reports that 68.7% of their users are male. Dateportal provides an indication of social media audience consumption by age and gender, based on advertising audience share, as shown below:

Figure 5 Social media advertising audience profile<sup>29</sup>



The vast majority of Pakistani mainstream and non-mainstream media and information outlets maintain an active presence on social media platforms, mainly Facebook. The Facebook pages of television news channels regularly post hourly news bulletins and snippets from other programming on their pages and, consequently, television content reaches a wider audience. The top 10 Pakistani Twitter accounts — all with a following of more than 3 million — are mainly politicians, journalists, and sports stars.<sup>30</sup>

On the use of social media platforms, while there are no formal studies confirming the demographic of those who use Facebook, both the number of users and the amount of user-generated content suggests they come from across the country and from diverse socio-economic backgrounds. On the Twitter platform users in Pakistan use it to share and amplify the content from other social media platforms which can include digital, print and television; this can increase access for those who may not be able to buy papers, or use/have access to television or radio sets.

TikTok, and similar mobile platforms (including Bigo Live and SnackVideo) are particularly popular amongst Pakistan's working class, as they don't require the users to write or read to communicate. This has led to some users of older social media platforms, such as Instagram, as well as those on broadcast media, to disparage TikTok. The opportunity to earn from the TikTok app also contributes to its popularity within certain groups.<sup>31</sup> TikTok can be an empowering medium for marginalised communities with access and has become a platform for establishing social ties and sharing personal life events for individuals living on the margins of Pakistani society, such as transgender communities.<sup>32</sup>

Television in Pakistan is structured to cater primarily to an urban audience. Key studies suggest that there is a 'metropolitan bias' in television news reporting and that rural and semi-urban areas are de-prioritised and under-represented by television programming. This bias can be partly explained by the influence of advertisers and their focus on the populations of urban centres. While programming focuses on urban audiences, the majority of people in Pakistan live in rural and semi-urban areas where they may only have access to state television, or television owned by large private companies, with limited access to smaller digital media producers. These segments of society are also those most vulnerable to socio-economic challenges and the impact from disasters.

For rural media consumers then, radio may be the most important source of information for people. Studies support this view, and attribute it to the low cost of operation and its convenience. Radio station programming, especially in Punjab, the agricultural hub of Pakistan, caters to this audience by running shows focused on agricultural information in local languages and dialects. Radio is particularly important in areas that lack widespread internet, such as Balochistan.<sup>33</sup>

28 <http://hdr.undp.org/en/content/unleashing-potential-young-pakistan>

29 <https://datareportal.com/reports/digital-2021-pakistan>

30 <https://www.myheen.com/html/Twitter/top-50-the-most-followed-twitter-accounts-in-Pakistan.html>

31 <https://www.digitalrightsmonitor.pk/raw-unedited-human-emotion-is-what-makes-bigo-live-so-popular/>

32 <http://ii.68.103.26/journals/index.php/jms/article/viewFile/4027/1951>

33 <http://journal.balochiacademy.org/index.php/Balochistaniyat/article/view/50>

Radio is also one of the most accessible mediums in Pakistan, with many people listening to radio in their cars. Also the growth of phones with FM radio receivers has led to an increase in audiences, particularly amongst the young, though one study does show young people feeling radio has been hijacked by politicians to propagate political agendas.<sup>34</sup> However, the popularity of radio as an information source may have reached a peak as in the context of technological developments media commentators have noted that with the increase of people accessing news over the Internet ‘the future of radio journalism, although not entertainment, looks bleak in Pakistan’.<sup>35</sup>

Only a fraction of people access print (discounting the digital traffic) for news and information. A study carried out by Media Matters for Democracy found that only 14.5% of a survey group of 503 people stated that newspapers were their main source of news and information.<sup>36</sup> Newspapers follow the traditional principles of journalism and are trusted by readers - this trust is aided by the perceived ‘permanence’ of the written word. Local language newspapers continue to be the main source of local news in the majority of areas which are underserved by TV news, such as interior Sindh and South Punjab.

Research conducted by Media Matters for Democracy indicate that most information consumers in Pakistan rate long-standing familiar media such as newspapers and television to be the highest in terms of trust, including for COVID-19 related information. Of note is that they are also the most regulated. A study conducted by Media Matters for Democracy, analysing the public trust in media during COVID-19 found that 55% of respondents rely on mainstream television to access news and information about COVID-19, and 57% of respondents indicated that mainstream television news content was the most reliable source of information on COVID-19.<sup>37</sup> Internet and digital platforms are much freer in comparison, and are perceived to be rife with misinformation, especially on COVID-19, and news consumers see them as the least trusted sources.<sup>38</sup> One interviewee has attributed the news audience awareness of misinformation and ‘conspiracy theories’ on digital spaces for giving non-social media a relative higher level of trust.

## 2.6 Two-way communication with communities

Traditionally are limited examples of the media facilitating two-way communication and feedback from communities in Pakistan beyond phone-ins and reporters working in the field. However, increasingly, the media is encouraging user feedback and soliciting information through social media platforms. Social media platforms have been able to facilitate two-way communication between communities and the authorities during the COVID-19 pandemic. The authorities are usually actively listening for trending topics or issues of public concern, as well as being keen to relay messages back to the public.

Mobile phones, in particular SMS-based communication, have been, in many cases, the main form of communication between the government and citizens for COVID-19 vaccine related information. Government portals have used SMS-based systems, integrated with the NADRA database, for registration and guidance on vaccines. Analysis of this SMS data can provide details on specific demographics, such as the number of people in urban vs rural areas who are registering for vaccines or areas with low vaccine uptake.<sup>39</sup>

While two-way communication in print media is limited, most papers in Pakistan publish reader’s letters to the editors. A significant number of papers now operate digital versions which include comment sections on their sites. Organisations rarely respond to public comments on their official social media, but reporters, editors and writers operate their own social media and, at times, do respond to people commenting on their pieces and writings.

Almost all radio stations encourage two-way communication through phone calls, SMS messages and their social media platforms. These messages are often discussed by experts during programming. Discussions often raise awareness on health issues – e.g., for breast cancer and polio – and allow for the listeners to call in and ask questions about vaccines, immunisation, and prevention, etc.

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34 <https://ideas.repec.org/a/aaw/gprjrn/v5y2020ilpi72-181.html>

35 <https://www.thenews.com.pk/tns/detail/621169-radios-grim-prospects>

36 <https://drive.google.com/file/d/1atFtXjKAmMjcQ0MO7HY9cTKeLj68Ar/view>

37 <https://www.digitalrightsmonitor.pk/wp-content/uploads/2020/12/MMfD-Public-Trust-Media-Covid-1.pdf>

38 <https://mediamatters.pk/publications/>

39 <https://www.dawn.com/news/1607576>





### SECTION 3

## *Use Of Media In Disasters Response And During The Covid-19 Pandemic*

PAKISTAN IS AFFECTED BY NATURAL DISASTERS AND CONFLICT. IT IS PRONE TO EARTHQUAKES, SEASONAL FLOODING, DROUGHT, LANDSLIDES AND AVALANCHES. COVID-19 PRESENTED A UNIQUE CHALLENGE TO THE MEDIA IN PAKISTAN, AND AN OPPORTUNITY TO UNDERSTAND THE ROLE OF THE MEDIA IN A CURRENT DISASTER RESPONSE CONTEXT.

### **3.1 Background**

Each year, at least 3 million people in Pakistan are impacted by natural hazards. A recent example is the severe drought which decimated the agriculture sector in 2018-19, affecting 5.5 million people, particularly in Sindh and Balochistan. Effective communication around natural disaster preparedness, warnings and emergency response and assistance is critical, in particular for marginalised and displaced groups.

In humanitarian relief, Pakistan hosts over 1.4 million Afghan refugees - 68% living in urban areas and 32% living in refugee villages (camps), according to UNHCR.<sup>40</sup> The majority reside in KP and Balochistan.

With COVID-19 as of September 27th 2021, there had been 1.24 million confirmed COVID-19 cases and 27,366 deaths in Pakistan according to WHO figures. The Government of Pakistan's website shows that the highest number of cases have been in Sindh, followed by Punjab, KP and Islamabad. Over 5 million COVID-19 vaccine doses have been delivered in Pakistan. UNICEF's data shows that almost twice as many men than women have received both first and second doses (64% of men, compared to 36% women).

### **3.2 The Role Of The Media**

Although Pakistan is prone to natural calamities the Pakistani media doesn't play a substantial role in disaster risk management or the pre-disaster phase of natural disasters. Lubna Zaheer, Associate Professor from School of Communication Studies, states in her analysis that a code of conduct must be formulated to ensure effective media coverage of natural disasters.<sup>41</sup> PEMRA does issue advisories for media occasionally, but it does not have specific instructions on how it should cover disasters, other than guidelines such as not to show graphic images. Several interviewees criticised the mainstream media for its focus on Islamabad and other main cities while ignoring what was happening in rural and less accessible areas.

40 <https://www.unhcr.org/pk/>

41 <http://pu.edu.pk/images/journal/pols/pdf-files/12%20-%20LUBNA%20ZAHEER.v23.1.16.pdf>

Television news media is often the first to arrive on the scene of disasters, at times even before the disaster response teams. Interviewees believe this is due to Pakistan's news media's 'breaking news' culture and emphasis on being 'first on the spot'. There are numerous examples where relief efforts were provided or reinforced in response to TV reporting. Television news media actively source information from social media platforms, mainly from Twitter and Facebook. There have been numerous cases where a tweet from a member of an affected community made headlines on television news, or an incident reported initially on social media platforms got picked up on the news and generated a response from the authorities to address the gap or problem.

Social media has a proportionally large impact when disasters happen in areas which are seldom covered by television, such as semi-urban or rural areas due to television's focus on urban centres. Studies in Pakistan have shown social media usage increasing during disasters when individuals need quick and detailed information, using social media may also improve emotional and psychological welfare for the users.<sup>42</sup>

**MEDIA IN REFUGEE RESPONSE:** Pakistan has been hosting refugees from Afghanistan for 40 years, and Pakistan has the world's second-largest refugee population. Effective channels of communication with refugees are vital if they are to access services (including health and education). Good communication can also address issues of marginalisation and concerns around protection, repatriation and statelessness. Representation and participation of refugees in the media has been limited. UNHCR and their partners are engaged in various communication activities with refugee communities. They use social media (Twitter, Facebook), complaint and feedback boxes, mass information materials, radio and TV, helplines, emails and community meetings and communicate through Shura meetings and religious leaders. They also provide information fliers on their assistance activities to refugee communities and leaders.<sup>43</sup> Historically, UNHCR has worked with radio stations such as Radio Pakistan to produce programmes and content specifically for refugees. This has included providing updates on the UNHCR voluntary repatriation scheme, and information about life at home. A UNHCR spokesperson said they also work with Deewa Radio, Mashal Radio, Ashna Radio, Khyber Television, and Mashriq Television, all of which broadcast in Pashto.

A qualitative study (2021)<sup>44</sup> with Afghan refugee men and women in Haripur and Swabi, conducted by Power 99, showed that social media is their biggest source of information. This is particularly true for young people. Refugees listen to foreign radio channels with Pashto programming such as RFE/RL's Mashaal and VoA's Deeva. WhatsApp and Facebook are also used for information and to stay in touch with their families abroad. They listen to the BBC Pashto language programme Nara Da Wakh, at 8 p.m and the Pushto and Dari Program from FM99.4 by Parveen Rehmati. Those that have TVs (estimated to be around 20%) access PTV news and PTV Home (terrestrial, state-owned TV) - those with satellite dishes can access other news channels in Pakistan and Afghanistan.

The media mostly followed by refugees are: Shamshad (Afghanistan), Ashna Radio (VoA), Shamal (Afghanistan) and Geo (Pakistan). In terms of participating in two-way communication, refugees (usually represented by elders, or high-profile people like teachers) go to the press clubs in Peshawar or Haripur to have their voice heard. According to feedback from refugees, their information needs, in order of priority are information about the situation in their villages and towns in Afghanistan, health issues, education, women's issues, and general awareness. The study recommends these programmes should be created in digital formats - podcasts and video - to be available on mobiles and social media. Digital technologies to engage refugees, such as creation of a dedicated Facebook page for refugee-related concerns, and a WhatsApp group to share issues with the radio station, are suggested.

Audience Research conducted in Peshawar and Kohat districts of Khyber Pakhtunkhwa by Tribal News Network,<sup>45</sup> shows that TV and social media platforms, especially Facebook, are the main sources of news and information for 78% of Afghan refugees, and that radio is the main information source for 50%. Newspapers are more popular in Peshawar (57%) than Kohat (43%). Social media is the main source of news and information for Afghan Refugees in Peshawar and Kohat districts, for both males and females. This is because recorded news and information programmes can be accessed any time on social media.

42 <http://pu.edu.pk/images/journal/pols/pdf-files/12%20-%20LUBNA%20ZAHEER.v23.1.16.pdf>

43 Community-Based Protection update Oct 2020, Covid external update Sept 2020, UNHCR operational update June 2021.

44 Enabling and Strengthening Refugee Voices, Afghan Refugees and Media in Pakistan - Concerns, Preferences and Challenges, POWER99 Foundation, (2021)

45 Audience Research Of Afghan Refugees, Tribal News Network (TNN) supported by DW Akademie, (April 2021)



Interviews show 94% of Afghan refugees use media sources for news and information almost every day (7 days a week). 89% prefer to do this from 6 PM to 9 PM, 22% before 6 AM, 11% 9 PM to late night, 6% 6 AM to 9 AM and 6% Noon (12 PM to 3 PM). The study showed international media sources are felt to be authentic, sharing accurate and precise news and information about Afghans. It found that 27% of Afghan Refugees are interested in international media sources, 17% are interested in media sources owned by Afghanistan, 11% are interested in social media, and 9% are interested in media sources owned by Pakistan. Media outlets such as BBC Pashto, Mashal Radio, and Deewa Radio are felt to report well on Afghan issues.

The study found that 67% of Afghan Refugees “don’t have easy access to media sources”, while for 56% it is “hard to find relevant programmes”. Feedback suggested Afghan media outlets should be allowed to broadcast through cable operators (rather than satellite TV channels) and that there should be more time allocated to Afghan programming. More Afghan presenters and reporters are needed and listener call-ins to the different programmes should be encouraged. In terms of content, 94% of participants were interested in topics around education, 50% health and 28% sports. Almost 100% of Afghan refugees use “News” on a daily basis, and 83% of participants said that media sources “keep them informed and up to date”. Pashto and Dari are the preferred languages by Afghan Refugees for news and information programming.

**MEDIA DURING COVID-19:** At the start of the pandemic the media were ill-prepared to report on a health crisis of the scale of COVID-19. One study stated: ‘One of the primary reasons for the gap in the communication and media outputs on the pandemic was not enough outreach with doctors and researchers’ and that ‘Political issues have always taken precedence in newsrooms...as for talk show hosts, there was a level of unease towards talking about the virus.’<sup>46</sup> Journalists complained of various challenges in reporting COVID-19 related stories, including the non-provision of reliable and verifiable data. Initially, the media largely focused on numbers, the numbers of tests, infections, fatalities, survivors, and the human face of the pandemic was not so prominently shown. This may be partly because the virus was seen as taboo and affected families were reluctant to share their experiences. The need for a more human-focused approach was partly rectified eventually by journalists relating their own experience. Journalists who contracted the virus began publicly documenting their experiences, breaking the taboo and becoming a critical source of information. From articles published in mainstream newspapers,<sup>47</sup> to daily accounts of the battle with the virus posted on Instagram,<sup>48</sup> journalists suffering from COVID-19 used their experiences to educate others.

The majority of experts interviewed for this research agree that the Pakistani media and the government eventually became more adept at communicating on COVID-19 and disseminating public health messaging. A senior news editor stated: ‘in terms of public health information dissemination... together both the media and government had played a fine role in communications around COVID-19’. One survey, looking at trust in the media during COVID-19, found that: “The public generally approved of the Pakistani news media coverage of the coronavirus pandemic. Most of the respondents agreed that COVID-19 news coverage had provided largely accurate information and that the media had worked for the benefit of the public”. The study found that, “people found the mainstream media the most trustworthy source of COVID-19 news and information, with 57% expressing trust in it. Fifty five percent of respondents said they used TV to get news and information about COVID-19”.<sup>49</sup>

An important element of the success of Pakistan’s response to COVID-19 was the formation of the Risk Communication and Community Engagement (RCCE) taskforce.<sup>50</sup> This platform has utilised diverse techniques to maximise communication opportunities. These include public service messaging on electronic and social media (85% of 43 million Facebook users accessed the NHSRC page), dissemination of testimonials of health workers, communicating via religious scholars and celebrities and monitoring the media for misinformation and fake news.<sup>51</sup> UNICEF Pakistan has promoted messaging on mainstream and social media, both around the COVID-19 response and promoting the

46 <http://library.fes.de/pdf-files/bueros/pakistan/17234.pdf>

47 <https://www.geo.tv/latest/317006-l-hested-positive-for-coronavirus-here-is-my-experience>

48 <https://www.instagram.com/tv/CA-DeTXgzla/>

49 <https://www.digitallightsmonitor.pk/wp-content/uploads/2020/12/MMFD-Public-Trust-Media-Covid-1.pdf>

50 The taskforce established in the early phase of the response, by the Ministry of National Health Services Regulations and Coordination (NHSRC), comprised of members from various ministries including health, line departments, and development partners with support from WHO and UNICEF.

51 <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC8325877/>

vaccination programme. They have found Facebook to be the best performing social media platform. Social media posts related to COVAX shipments of vaccines received very high levels of engagements, especially on Facebook.<sup>52</sup>

Digital media has played a key role in information provision throughout the pandemic. One interviewee stated: 'I think digital media did a better job of covering the pandemic than the mainstream as it allows users to take more of a deeper dive.' Though generally users gave social media a lower level of trust or accuracy of information than other forms of media. Despite this, social media has been effectively used for mobilising resources and create a sense of community. One of the earliest and most effective mobilisation attempts came in the form of a Facebook group, Corona Recovered Warriors, which was set up to coordinate convalescent plasma donations and allowed experts to talk to community members about the virus.<sup>53</sup>

The Dawn.com site launched 'three distinct customised content categories' for the dissemination of COVID-19 information, according to the chief digital strategist and editor "These three streams, feeding into the media groups other social media accounts, are generating immense traffic, which has grown six-fold from before Covid-19 hit Pakistan." The platforms are: Live Coronavirus Updates – a live tabulation of news and information, with links to further information - and the Pakistan Corona Statistics Dashboard, which contains statistical updates from the federal and provincial governments. Dawn also uses the hashtag #coronagoodnews on its Instagram to help move away from the frightening stories that dominate mainstream coverage. Humsub is an online-only media platform which acts as an opinion and information portal and is the largest repository of citizen blogs in the country. It has seen a doubling of submissions daily since the start of the pandemic. Adnan Khan Kakar, the editor of the platform, said: "It seems like sections of the society being ignored by the government in its official COVID-19 response are crying out for attention. They are not finding a voice in mainstream media, but they are finding a platform on Humsub to amplify across Pakistan." He felt Humsub helps to amplify the voices of women, minorities, experts, ordinary citizens and opinion makers.<sup>54</sup>

Over time social media platforms were used by government bodies to disperse information. COVID-19 portal - <https://covid.gov.pk/> - was set up by the government and is being used as the primary resource to share statistics. The National Command and Control Centre (NCOCC) was established in late March 2020, to broaden coordination and response between federal and provincial levels. An official Twitter account to disseminate information was set up. The Twitter account of the Ministry of National Health Services is also used to share information on COVID-19<sup>55</sup> such as public service messaging on the importance of getting vaccinated.<sup>56</sup> The government have engaged influencers, especially on popular platform TikTok, to discuss the importance of accurate public health information and to counter misinformation around COVID-19. They have also encouraged young influencers to produce content highlighting the importance of disease prevention. A programme called 'EhtiyatCorona' was facilitated by the Prime Minister's office primarily to fight virus misinformation.<sup>57</sup>

Newspapers have played an important role in relaying messaging around COVID-19 prevention, mitigation and vaccines, initially largely sourced through press briefings held by the National Command and Control Centre (NCOCC). These briefings have been criticised for consisting of political statements and lacking depth. Editorials in some papers presented independent commentary on the government's response. As subsequent waves hit, print media coverage became more diverse and papers started reporting a more in-depth picture of the pandemic and its impacts. A difference has been seen in the way the subject has been treated by English and Urdu Press; a comparison of the curated pages of two of the most popular papers in English and Urdu demonstrates that the Urdu language coverage is very straight forward, looking at numbers, trends and political developments.

Television news has played an important role in the COVID-19 response and its reporting has strengthened the response effort. One example was during the shortage of oxygen cylinders in Peshawar, which caused the deaths of 7 COVID-19 patients. Immediately after this story broke, resources were mobilised to provide a supply of oxygen.<sup>58</sup> Following this,

52 <https://www.unicef.org/media/105586/file/Pakistan%20Humanitarian%20Situation%20Report%20No.27,%2031%20>

53 <https://cn.reuters.com/article/us-health-coronavirus-pakistan-facebook-idUSKBN2412E2>

54 <https://www.mediasupport.org/media-in-pakistan-responding-to-Covid-19-challenges-with-innovation/>

55 <https://twitter.com/nhsrcofficial>

56 <https://twitter.com/nhsrcofficial/status/1430439811442118657?s=20>

57 <https://www.dawn.com/news/1542602>

58 <https://www.thenews.com.pk/latest/754585-seven-coronavirus-patients-die-due-to-lack-of-oxygen-in-peshawars-khyber-teaching-hospital>

most mainstream media outlets continued to monitor the status of oxygen supply in the region.<sup>59</sup> Television channels are also crowdsourcing information on the impact of COVID-19 through posts and commentary on social media platforms. Radio is traditionally considered to play an important role in public health messaging, especially in rural and remote areas of Pakistan.<sup>60</sup> The incorporation of brief messaging on COVID-19 has become a staple of programming on radio stations. For example, FM89 includes messages about wearing masks, sanitising and keeping social distance in all of their programmes.

Other media used for COVID-19 messaging include the use of automated tele-marketing (using various platforms including FrontlineSMS) and tele-messaging methods during COVID-19. An example is the customised 'dial tone' that all mobile service operators use to convey messages regarding COVID-19 prevention.<sup>61</sup>

**DISINFORMATION AND MISINFORMATION:** Misinformation related to COVID-19, and the verification of information, has been a massive challenge for the Pakistani news media, which regularly sources news and information from social media platforms. However, while media professionals interviewed for this study agreed that the media, largely played a responsible role, misinformation around COVID-19 vaccines is still appearing in many newspapers, such as this image from an Urdu paper claiming that people who have received the COVID-19 vaccine would die within two years. Another newspaper claimed that consuming chicken puts people at risk of contracting COVID-19.

In one study on misinformation, 39% of respondents believed that social media platforms are always used to share misinformation and 222% believed that WhatsApp is a culprit in this regard<sup>62</sup> Social media users believed that politicians and representatives were also responsible for COVID-19-related misinformation.<sup>63 64</sup>



PHOTO: OLIVIER MATTHYS-IFRC

59 <https://tribune.com.pk/story/2297562/doctors-fear-oxygen-shortage-in-k-p>

60 [https://papers.ssrn.com/sol3/papers.cfm?abstract\\_id=3864416](https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3864416) <http://ojs.rjsser.org.pk/index.php/rjsser/article/view/194>

61 <https://www.pta.gov.pk/en/media-center/single-media/pta-directs-cmos-to-replace-ring-back-tone-with-awareness-ones-270320>

62 <https://drive.google.com/file/d/1atF1FjKAmMjcQ0MO7HY9cTKeLj68Ar/view>

63 <https://twitter.com/desmukh/status/1268177509687885825?s=20>

64 <https://twitter.com/desmukh/status/1268177509687885825?s=20>

## SECTION 4:

# Media Overview

THIS SECTION GIVES AN OVERVIEW OF THE CURRENT MEDIA LANDSCAPE IN PAKISTAN: DIGITAL MEDIA PLATFORMS, SOCIAL MEDIA, TELEVISION, RADIO, PRINT AND TRADITIONAL FORMS OF COMMUNICATION. IT DOES NOT AIM TO GIVE AN EXHAUSTIVE REVIEW INSTEAD IT FOCUSES ON THE MAIN MEDIA PROVIDERS FOR EACH CATEGORY, USING AVAILABLE DATA AND STUDIES.

## 4.1 Digital Media Platforms

Digital media platforms are becoming an increasingly popular source of information in Pakistan, especially for news, and commentary on current affairs. Over recent years, there has been substantial investment in this sector and many new outlets have emerged. It is impossible to gauge the number of digital media outlets in the country, since digital media does not currently require licensing or registration. To capitalise on the popularity of social media, established long-standing print and broadcast outlets have developed an active digital and social media presence and are a leading source of information in the digital space. The digital reach of these online outlets alone is difficult to quantify since they are simultaneously publishing content through their websites, mobile apps, social media platforms and legacy media outlets.

Generally, digital media that is associated with a trusted group, or produce content in affiliation with an internationally recognised media organisation such as the BBC, Independent, or DW, are generally considered by users as trusted sources of information. The websites of Dawn, BBC Urdu, Geo News, Express Tribune, Independent Urdu, Urdu News, and ARY News are regarded as having credible content. Among legacy media outlets, the websites of Dawn, Jang and The News are quite popular. Saama Digital website and Express Tribune also attract attention. The websites of leading news channels Geo news and ARY news are also widely consumed. Most digital media outlets also actively disseminate news content through social media platforms, and maintain a strong presence on Facebook, Twitter, and YouTube. There are an increasing number of digital-only media outlets, such as Daily Pakistan and Urdu point. These outlets combine news, information, and entertainment content.

Video on-demand streaming services is often referred to in Pakistan as an Over The Top (OTT) platform. Currently the two most popular streaming services are Netflix and iFlix. The iFlix streaming service is offered as part of a bundle of services from the national telecommunications company Pakistan Telecommunication Company Ltd (PTCL) when customers get a smart TV connection.

The popularity of digital platforms can be assessed by observation, their web traffic, their social media following and ratings by web analytics companies like Alexa and SimilarWeb. Audience numbers do not necessarily translate into trust and credibility, this is especially true for digital-only platforms that create content with the primary intent of increasing traffic. Most of the data below was collected in September 2021 from Facebook insight (weekly reach data) unless otherwise noted:

### Digital-only sites

- » **Urdu Point** produces news and commentary on a range of thematic issues. Content is in both Urdu (the majority of content) and English and is accessed on the sub-domains (urdupoint.com and urdupoint.com/english). Content is designed for consumption on its social media and focused on gaining maximum engagement, as opposed to quality journalism.  
**Statistics:** YouTube channel subscribers: 5.71 million, Twitter followers: close to 190,000, Facebook followers: 13 million, estimated weekly reach: 17.9 million
- » **Independent Urdu** is considered an important and credible source of information and primarily produces news and commentary. The outlet reports on a wide range of thematic issues, including human rights and social injustices, and regularly publishes feature stories, and opinion pieces.  
**Statistics:** YouTube channel subscribers: 119,000, Twitter followers: 121,000 followers, Facebook followers: 1.7 million estimated weekly reach: 3.6 million
- » **Hamariweb.com** is a popular information source and offers information and infotainment on a wide range of thematic areas, including sports and travel.  
**Statistics:** YouTube channel subscribers: 80,000, Twitter followers: 4,800, Facebook followers: 2 million, eestimated weekly reach: 8.7 million



» **Urdu News** reports on a wide range of thematic areas and produces content to suit the traditional web format along with multimedia content geared towards social media platforms.

**Statistics:** Twitter followers: 50,000, Facebook followers: nearly half a million, estimated weekly reach: 370,000

» **BBC Urdu** is part of BBC World Service online and is considered a credible source of information, mainly for news and commentary.<sup>65</sup> It publishes feature stories and opinion pieces and content for re-sharing on social media platforms, including live stories, conversations, and other forms of multimedia content.

**Statistics:** YouTube channel subscribers: 1.89 million, Twitter followers: 3.2 million, Facebook followers: 9 million, estimated weekly reach: 6.1 million

### **Digital - hybrid outlets (primarily either print or broadcast, but now have a substantial digital presence)**

» **Jang Media Group** is arguably the largest media group in the country and is the owner of the three leading media platforms: Geo News, the country's leading news channels and digital platforms, The News, a popular English language daily, and Daily Jang, Pakistan's leading Urdu language daily. Their websites are popular digital sources of news and infotainment in the country.

\* **Geo.TV:** YouTube subscribers: 9.91 million, Twitter followers: 3.2 million, Facebook followers: 17 million

\* **The News:** Twitter followers: over 650,000, Facebook followers: 426,000

\* **The Daily Jang:** Twitter followers: 800,000, Facebook followers: 810,000

» **Dawn.com**, is a subsidiary of Dawn Media and is one of the leading digital media platforms. Primarily known for its English language newspaper, Dawn is regarded as one of the most credible news sources in the country. Dawn.com features news and feature stories, opinion pieces and editorials. Dawn.com also maintains a strong presence on social media platforms, mainly Twitter. Dawnnews.tv is the website of Dawn's television news channel.

\* **Dawn.com: Twitter:** 1.1 million,<sup>66</sup> Facebook followers: 2.8 million, estimated weekly reach: 1.3 million.

\* **Dawnnews.tv:** YouTube channel subscribers: 640,000, Twitter followers: 2 million

\* **Facebook followers:** 5.2 million, estimated weekly reach: 2.4 million

» **The Express Media Group** owns three popular digital news platforms: Express Tribune (ET) a popular English language platform, Express.pk (the website of Express News TV) and Express.com.pk (the website of Express's Urdu daily newspaper). ET produces multimedia content for social media consumption - mainly YouTube and Facebook. Both outlets maintain an active social media presence.

\* **Express Tribune (ET):** YouTube channel subscribers: just over 61,000, Twitter followers: 1 million, Facebook followers: 2.4 million, estimated weekly reach: 1.2 million

\* **Express News TV (express.pk):** YouTube channel subscribers: 3.1 million, Twitter followers: 3.3 million, Facebook followers: 16 million, reach data not available

\* **Express Urdu YouTube** is shared between Express TV and Express Urdu. Daily, Twitter followers: 500,000, Facebook followers: 1.1 million reach data not available

» **Daily Pakistan** is part of the Pakistan Group and is a popular digital platform producing news and commentary. It has an active presence on social media platforms, on Youtube, Twitter, and Facebook, and most of its content is designed to be consumed on social media platforms. Daily Pakistan follows a content model similar to Urdu Point, and the majority of content that gets most traffic, especially on social media platform, is designed as click-bait

**Statistics:** YouTube channel subscribers: 2.61 million, Twitter followers: 285,000, Facebook followers: 16 million.

» **Arynews.tv** is the website of one of the leading broadcast media outlets and is an important and popular digital media platform. The website features news, information, entertainment and commentary content, mainly from the ARY News TV, and also generates multimedia content for consumption in the digital space, including on social media platforms.

**Statistics:** YouTube channel subscribers: 7.7 million, Twitter followers: 1.7 million, Facebook followers: 21 million estimated weekly reach on Facebook: 25 million

<sup>65</sup> <https://www.bbc.com/Urdu>

<sup>66</sup> [https://twitter.com/dawn\\_com](https://twitter.com/dawn_com)

Figure 6 Audience Data Digital Outlets<sup>67</sup>

	Web traffic	Popularity (data from July 2021)	Reach
<b>Urdu Point</b>	60.3% of web traffic through search engines, (keywords searchers: 'news', or 'weather'). 33.59% is direct traffic. 4.51% of traffic is routed through social media platforms. Visitors stay on website average 3 mins exploring nearly 3 pages.	Rated 12th highest in the country by Alexa, and 15th highest by SEMRUSH. Total of 7.36 million visits	Mobile phone app downloaded over 100,000 times . 66.1% visits to website from Pakistan, 6% from India.
<b>Independent Urdu</b>	48.9% web traffic through social media, 17% routed from search engines via keyword searches, (such as "Urdu news", and "Pakistan news").  Visitors stay on this website for about 2 mins and export about 1.8 pages.	Total of 320,000 visits	Mobile phone app downloaded more than 100,000 times in total.  79% visits from Pakistan (79%) and USA (4.3%).
<b>Hamari Web</b>	77.5% of web traffic through search engines/keyword searches, and only 16% of total traffic is direct.  Visitors stay for 1 minute 30 seconds and explore 1.5 pages.	Listed as the 5th highest in Pakistan on Alexa. It had 20 million total visits.	56.9% traffic from Pakistan 11.7% from USA.
<b>Urdu News</b>	58.77% of web traffic directly through URL access, 31.1% through search engines via keyword searches, and 9.7% from social media platforms through referrals.  Visitors stay on average about 3 minutes 30 seconds and explore about 2.9 pages.	Total of 1.02 million visits	50.2% traffic from Saudi Arabia, and 41.3% from Pakistan.
<b>Geo News (geo.tv)</b>	56% web traffic through search engines via keyword searches, 36.8% is direct.  Visitors spend 1 minute 38 seconds on the website, and explore 1.7 pages.	Total of 18.3 million visits	42% traffic from within Pakistan, 13.6% from USA.
<b>The News</b>	Data not available	Total of 7 million visits	56.4% traffic from Pakistan, 13.5% from USA, 9.3% from India
<b>The Daily Jang</b>	Data not available	Website generated almost 6.6 million visits	61.3% traffic from Pakistan, 7.7% from the US, and 6.9% from Canada
<b>Daily Express (Urdu)</b>	Data not available	Express Urdu daily's website generated a total of 2.7 million monthly visits	80% traffic from Pakistan, 4.2% from UAE, and 2.9% from Saudi Arabia
<b>Express Tribune</b>	Data not available	Listed at 37th highest-rated website in Pakistan. Express Tribune's website received a total of 3.5 million visits	76% traffic from Pakistan, 5.7% from the US, and 4.2% from India
<b>Daily Pakistan</b>	Data not available	Total of 3.4 million visits July 2021Alexa rates website as 15th highest in Pakistan.	76% traffic from Pakistan, 8.6% from Oman, and 3.9% from Saudi Arabia
<b>Arynews.tv</b>	Data not available	Listed as 7th highest-rated in Pakistan by Alexa  Generated a total of 1.8 million visits	83% traffic from Pakistan, 3.7% traffic from Saudi Arabia, and 3.5% traffic from UAE
<b>Dawn News (dawn.com)</b>	62.6% traffic through URL access, about 28% through search engines. Visitors spend 9 minutes 30 seconds on the website, exploring 3.4 pages. Dawn.com page generated more than 150,000 interactions over a 2-week period.	Listed as 9th highest-rated website in Pakistan by SEMRUSH, and the 12th highest by Alexa.  Dawn.com received 11.5 million total visits July 2021 and dawnnews.tv, received 2 million visits	Highest traffic from within Pakistan (56.6%), India (12.47%), and the US (10.2%)

67 Date from Alexa (August 2021), SimilarWeb and SEMRUSH (January 2021, retrieved from DataReportal). Note that web analytics data is dynamic and can change frequently.



## 4.2 Social Media Platforms

According to statistics published by DataReportal in January 2021, Pakistan has 46 million social media users, on platforms including Facebook, YouTube, Snapchat, Instagram, LinkedIn, and Twitter. These figures do not include subscribers of other popular social media platforms in Pakistan, such as TikTok, Bigo Live, SnackVideo, Likee and a wide range of dating applications. Whilst predominantly used for entertainment, these platforms are also used for information access and dissemination. The country has experienced a large growth in users and the signs are that this growth rate will continue. The vast majority, 99.1%, of social media users access platforms through mobile devices such as Android phones, iPhones, tablets etc.<sup>68</sup> There is a lack of official data on social media usage in Pakistan, as it is not directly collected by Pakistan's telecom regulator, the Pakistan Telecommunication Authority. Consequently, this guide relies on data provided by the platforms themselves, or sources data from independent curators of statistics. To ensure accuracy, this data has been triangulated with data from multiple sources.

A substantial number of social media users in Pakistan communicate in Urdu - especially on Facebook. However, both Urdu and English text are used on nearly all the social media platforms. On Twitter, the vast number of conversations on local issues are conducted in Urdu. The use of Urdu language in digital communications has seen a rise, thanks to the fact that mobile phones also support typing in Urdu and most users in Pakistan access social media platforms through mobile devices. In addition to Facebook and Twitter, platforms that allow visual communications are also becoming increasingly popular, such as Tiktok and SnackVideo.

According to statcounter, in November 2021, the most used social media networks were: Facebook 90%,

Twitter 7.49%, YouTube 0.75%, Instagram 0.68%, Pinterest 0.56%, reddit 0.46%.<sup>69</sup> Data from napoleoncat for November 2021 showed there were 51,890,900 Facebook users - 23.9% of the entire population. The majority of them were men (77.3%), with people aged 18 to 24 the largest user group. There are 13,204,100 Instagram users, 43,265,000 Messenger and 7,857,000 LinkedIn users.<sup>70</sup>

- » Nearly 91.9% of Facebook's traffic from Pakistan comes through mobile devices.<sup>71</sup> Facebook groups are primarily used for social networking, e-commerce, information access and exchange (including news and current affairs), and entertainment. The largest group has a membership of 3.4 million users.<sup>72</sup> Facebook is also used as a tool for political engagement and community mobilisation and as an important information source by journalists.
- » YouTube is the second-largest social media platform in Pakistan in terms of 'audience reach' with a reach of 36.1 million.<sup>73</sup> However, YouTube's website is rated higher than Facebook in terms of web traffic, the second highest in Pakistan.<sup>74</sup> According to analysis, the platform is used primarily for entertainment, news and commentary, and education and learning.<sup>75</sup>
- » Instagram is used to make statements about political activities, through sharing selfies and pictures during protests, and the content wields a certain social influence.
- » TikTok currently has 33 million users which makes it the third most used social media platform in the country.<sup>76</sup> It is considered the leading platform for 'short-form' video sharing and streaming applications. It is used primarily for entertainment/infotainment and is also used by some influencers to generate income. It also features political satire, and whilst extremely popular, there have been multiple bans over the past two years.
- » Twitter is the least used platform in terms of reach and web traffic.<sup>77</sup> However, it is used frequently by, government functionaries, political parties, police officials and law enforcement agencies, and other civil society groups, which gives it greater influence than just the number of users may indicate. The platform is primarily used for information

68 <https://datareportal.com/reports/digital-2021-pakistan>

69 <https://gs.statcounter.com/social-media-stats/all/Pakistan>

70 <https://napoleoncat.com/stats/social-media-users-in-pakistan/2021/11/>

71 <https://datareportal.com/reports/digital-2021-pakistan>

72 <https://toplistinpk.com/top-10-largest-facebook-groups-of-pakistan-with-1-million-plus-members/>

73 <https://datareportal.com/reports/digital-2021-pakistan>

74 <https://www.alexa.com/topsites/countries/PK>

75 <https://datareportal.com/reports/digital-2021-pakistan>

76 <https://techcrunch.com/2021/03/11/pakistan-blocks-tiktok-again-over-immoral-and-objectionable-videos/>

77 <https://www.alexa.com/topsites/countries/PK>

exchange on various issues including news, current affairs, and political debate. It is actively used for campaigning and mobilisation, and to facilitate two-way communication between communities, media and the authorities on a wide range of issues, including governance, public health, and policing. Even if content was originated on other platforms (such as TikTok and Facebook), it has the potential to make headlines, with leading broadcast and print media outlets regularly using Twitter to source information (including on COVID-19).

Figure 7 Audience Data Social Media Platforms<sup>78</sup>

	Visits	Reach	Gender/Age
<b>Facebook</b>	Nearly 43.3 million totals visits in a day, of which 2.05 million are unique visits.  Users spend average 15 minutes and 36 seconds per visit.	Over 50 million users, which accounts for almost a quarter of the population. Third highest rated website in Pakistan, The second most downloaded app in the country.	Over 70% of users are male. People aged 25 to 34 are the largest user group.
<b>YouTube</b>	166 million visits in a day, 2.83 million are unique visits.  Internet users spend 'most time per visit' on YouTube, an average 30 minutes and 29 seconds.	The second-largest social media platform in Pakistan (in-terms of 'audience reach') with a reach of 36.1 million.	31.3% of total audience is female and 68.7% male.
<b>TikTok</b>	Globally, the average user spends approximately 45 minutes per day on TikTok. Top 10 most followed Pakistani users all produce mainly entertainment content and have followings from 8 million to 16.5 million, the most popular generating 448 million likes.	The third most used social media platform with 33 million users  The third most downloaded app and the 6th most popular in terms of most active users. Downloaded almost 39 million times in Pakistan.	Approximately 50% of TikTok's global audience is under the age of 34, and roughly 32.5% is between the ages of 10 to 19, with similar trends observed in Pakistan.
<b>Instagram</b>	791 million daily visits - 679,000 are unique visits.  Users spend on an average 15 mins 8 second per visit	Instagram is the fourth largest social media platform in Pakistan with 11 million, users.	33% of its audience in Pakistan identify as female, and 67% male
<b>Twitter</b>	million daily visits - 507,000 are unique visits. Users spend on an average 15 minutes 23 seconds per visit.	Twitter's mobile app is rated the 9th highest in the country in terms of active users.	Twitter reports that 11.8% of users identify as female, and 88.2% male.

### 4.3 Television Stations


Television is the main form of mass media in Pakistan, reaching audiences who may be unable to access other mediums due to barriers of literacy, resources or access to infrastructure. Experts estimate that nearly 75% of households have televisions. This translates into approximately 21 million households and around 137 million individuals with access to television sets.<sup>79</sup> Growth of television access has been largely the same in urban and rural sectors. Since the introduction of private media licenses, the television industry has gone through a period of growth with the number of channels increasing exponentially.

There is no publicly available dataset comparing the ratings of different news and entertainment channels. However, data sets specific to different channels are prepared and made available commercially mainly by MediaLogics, a Target Rating Point (TRP) company in Pakistan. Channels tend to share these ratings when a particular programme has a scored highly and thus the stats cannot be seen as an objective indication of overall popularity. Television channels in Pakistan can be divided into two categories: state-owned and private, there are also private satellite, international channels and cable channels.

**STATE-OWNED TV TELEVISION:** The government broadcasts via both terrestrial, satellite and cable networks. Only the state can transmit via terrestrial networks, while private broadcasters are restricted to cable and satellite. This puts

<sup>78</sup> Data below is from the platforms themselves, dataportal, SimilarWeb Dec 2020, napoleoncat (Data presented on this website is sourced directly from the respective social platforms marketing APIs and compiled by NapoleonCat).

<sup>79</sup> <https://tribune.com.pk/story/1491353/census-2017-family-size-shrinks>



private broadcasters at a disadvantage in a country where a significant proportion of the population only has access to terrestrial TV. The state-run Pakistan Television (PTV) family is publicly funded and runs six channels. PTV News and the other channels in the network are the only terrestrial channels in the country and are broadcast simultaneously via terrestrial and private cable networks. PTV does not fall under the jurisdiction of PEMRA and is not regulated. There have been instances of direct competition between state and private broadcasters, especially around the licensing of air sporting events, resulting in heavy financial losses for private broadcasters.

**PRIVATE SATELLITE BROADCASTERS** run national channels as well as regional channels with content tailored for particular regions, ethnic communities or languages. PEMRA, Pakistan's electronic media regulator, has licensed a total of 106 private satellite channels to operate under various categories: e.g. news, entertainment and sports (correct to 31st December 2020).<sup>80</sup> Of these, about 34 broadcast news and infotainment content. Fourteen of the 34 would be categorised as regional, and 20 national.

**INTERNATIONAL CHANNELS:** PEMRA has licensed 43 international channels for broadcast in Pakistan, including the global networks CNN, DW, and BBC.<sup>81</sup>

**CABLE CHANNELS:** PEMRA has licensed 4,062 cable networks for distribution of both licensed private TV channels and state-owned channels.<sup>82</sup> The cable networks vary vastly in size and distribution abilities. Some of the leading cable service providers in Pakistan are PTCL, Nayatel, World Call, and Storm Fiber. Each licensed cable operator is allowed to broadcast 4 channels (transmitted only on that particular cable network). Most of these channels air entertainment content, but they also broadcast advertisements which are considered to be a good mechanism for messaging and reaching out to local population.

**NATIONAL CHANNELS:** Geo News, a subsidiary of the Jang Group, Pakistan's leading media group, and ARY News, a subsidiary of ARY group, are considered two of the leading news and infotainment outlets. The groups both have corresponding entertainment channels (Geo Entertainment, Geo Kahani, and ARY Digital). Combined the groups command more than 26% of Pakistan's total TV audience share.<sup>83</sup>

**REGIONAL CHANNELS:** Kavish Television Network (KTN), a subsidiary of the KTN group, is considered the country's largest regional media group in terms of audience share. The broadcast wing of KTN group comprises of three TV channels (KTN, KTN News, and Kashish), combined, they command more than 50% of total audience share for regional TV channels.<sup>84</sup> The regional TV channels with the largest audiences are: KTN, followed by Sindh TV and Kashish TV.

The most recent data available on television viewing patterns in Pakistan was collected by Gallup and published by Aurora in 2019 and shows that Geo News has the largest audience share in the category of national news channels, followed by ARY News, and PTV News.<sup>85</sup> Advertisement revenue is another indication of popularity. According to Aurora, Pakistan's leading advertising, marketing and media magazine, ARY Digital, Geo News and Geo Entertainment had the biggest share of advertising revenue for the fiscal years 2019-20.<sup>86</sup> Other popular channels according to advertisement spent share were Geo Entertainment, Hum TV, ARY News, PTV Home and Dunya TV.

Data published by Aurora (2017-18) television viewership in Pakistan ranges between 1.82 and 2.33 hours a day; it is highest in large cities (2.33 hours) and lowest in rural areas (1.82 hours). The peak hours of viewership are between 7 PM to 11 PM, with most television channels broadcasting their highest-rated programmes during this time. Audience share by genre: entertainment 55%, News 19% (this includes breaking news, hourly news bulletins, current affairs, political talk shows and infotainment shows), regional channels 4%, other 22% (other programming and content, such as religious channels, etc.).

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80 [https://pemra.gov.pk/uploads/pub-rep/pemra\\_annual\\_report\\_19-20.pdf](https://pemra.gov.pk/uploads/pub-rep/pemra_annual_report_19-20.pdf)

81 [https://pemra.gov.pk/uploads/pub-rep/pemra\\_annual\\_report\\_19-20.pdf](https://pemra.gov.pk/uploads/pub-rep/pemra_annual_report_19-20.pdf)

82 [https://pemra.gov.pk/uploads/pub-rep/pemra\\_annual\\_report\\_19-20.pdf](https://pemra.gov.pk/uploads/pub-rep/pemra_annual_report_19-20.pdf)

83 <https://aurora.dawn.com/news/1143363>

84 <https://aurora.dawn.com/news/1143363>

85 <https://aurora.dawn.com/news/1143363>

86 <https://aurora.dawn.com/news/1143946>

Figure 8 Total TV Audience Share By Genre (privately owned satellite channels and the terrestrial channels)<sup>87</sup>

	Content	Audience	Locations	Most popular news show
Geo News	News updates (perceived as having a left-of-centre leaning)	24% audience share among top news channels	Leading urban centres are main audience. In digital space, most of Geo News's audience engage through its main website and Facebook page.	'Aaj Shahzeb Khanzada Kay Saath' (investigative) news, airs 10:05 PM from Monday to Friday, and hosted by Shahzeb Khanzada a known investigative journalist in Pakistan.
ARY News	News updates (perceived as having centre leaning)	13% audience share among the top news channels,	Leading urban centres are main audience, in digital space, most of ARY New's audience engage through its main website and Facebook page.	Sar-e-Aam, a crime-based show, airs 7 pm Friday and Saturday.
Express News	News updates (perceived as having centre leaning)	4% audience share among the top news channels,	Leading urban centres are main audience. In digital space, most of Express New's audience engage through its main website and Facebook page.	'Kal Tak' -a political talk show air at 10 PM Monday to Thursday.
Hum News	News updates (perceived as having centre leaning)		Leading urban centres are the main audience hotspots	Break Point with Malik' airs at 8 PM on Monday to Thursday
Samaa TV	News updates (perceived as having a right-of-centre leaning)	9% audience share among the top news channels,	Leading urban centres are the main audience hotspots	Nadeem Malik Live'. Hosted by a senior journalist Nadeem Malik, features political commentary and debate on current affairs.
PTV News	News updates	11% audience share among the top news channels,	Popular in the areas where cable television access is either limited or non-existent. Vast majority of audience is semi-urban and rural, likely from a low-income background.	'Such tou Yae Hai' a traditional political talk show and airs at 10 PM
KTN News	News updates/political debate	39% of the audience share among leading regional news channels ( KTN/ KTN news)	Regional KTN News is the news and current affairs wing of the KTN TV.	Sar-e-Aam, a crime-based show, airs 7 PM Friday and Saturday.
Sindh TV News	News updates/political debate	16% audience share among the top regional channels	Regional, Sindh TV news is the second-largest Sindhi language channel	
Mehran TV	General entertainment / News updates	5% audience share among the leading regional channel	Regional, A Sindhi language channel	

87 <https://aurora.dawn.com/news/1143363>; <http://pemra.gov.pk>

## 4.4 Radio Channels

The state-run Pakistan Broadcasting Corporation (PBC) operates Radio Pakistan, which is the largest radio network in Pakistan. PBC's extensive national network of AM / SW / FM stations and representatives covers 98% of the population and 80% of the total area in Pakistan.<sup>88</sup> PBC owns and operates all AM transmissions, as well as broadcasting on FM channels, and does not grant AM licenses to private broadcasters. The network produces all the national and international news content in the country. PBC's stations are not regulated by PEMRA and instead operate under the Pakistan Broadcasting Corporation Act 1973.

PEMRA has awarded a total of 235 FM licenses, to 175 commercial,<sup>89</sup> and 60 non-commercial,<sup>90</sup> radio stations. The private stations mainly broadcast entertainment and information content (such as commercial announcements, awareness campaigns on health and related issues, commentary on sports, etc.). They are not permitted to produce their own news and current affairs programmes and are restricted to broadcasting news content produced by Pakistan Broadcasting Service (Radio Pakistan), and to a limited extent, BBC Urdu audio and Voice of America. Some channels however do broadcast local news.

Most commercial broadcasters focus on entertainment, with news and current affairs taking a back seat. Some stations, associated with larger media houses, play on the hour news headlines (e.g., Saama Radio) but they rarely air any detailed news content beyond these headlines. Some broadcasters have questionable advertising practices, such as the broadcast of sponsored content by alternate medicine and healing practitioners, hakeems, and spiritual healers. Often these advertisements are embedded within entertainment programming. According to the advertising code, such misleading advertisements are not legally allowed on broadcast media.

Most non-commercial licenses are granted to campus radios, which have limited broadcasting capabilities. Other examples of non-commercial radio stations are those run by city traffic police stations which are popular among commuters who want accurate and timely traffic updates. There is little to no community media, however, after the 2005 earthquake PEMRA did issue a set of non-commercial licenses with the purpose of mobilising support for the earthquake victims.

Since 2018 there has been increased discussion around the digitisation of PBC. In March 2020, Imran Khan's government announced a plan to fully digitise the state-owned Radio Pakistan.<sup>91</sup> Some of the stations operated by Radio Pakistan have already been made available online for listeners and can be live streamed at <https://www.radio.gov.pk/live-streaming>.

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88 <https://www.radio.gov.pk/abc-family>

89 [https://pemra.gov.pk/uploads/licensing/fm/List\\_Of\\_Commercial\\_FM\\_Radio.pdf](https://pemra.gov.pk/uploads/licensing/fm/List_Of_Commercial_FM_Radio.pdf), to access new lists as they are updated <https://pemra.gov.pk/fm.php>

90 [https://pemra.gov.pk/uploads/licensing/fm/List\\_Of\\_Non\\_Commercial\\_FM\\_Radio.pdf](https://pemra.gov.pk/uploads/licensing/fm/List_Of_Non_Commercial_FM_Radio.pdf)

91 <http://www.radio.gov.pk/trainings/12-03-2020/govt-plans-to-fully-digitize-abc-press-release-11-03-2020>

Figure 9 Audience Data TV Stations

Stations	Ownership	Official Social Media Outlets	Weblink
<b>Radio Pakistan</b>	Government	<a href="https://www.facebook.com/radiopakistannewsofficial">https://www.facebook.com/radiopakistannewsofficial</a> , <a href="https://twitter.com/RadioPakistan">https://twitter.com/RadioPakistan</a>	<a href="http://www.radio.gov.pk/">http://www.radio.gov.pk/</a>
<b>FM 93</b> broadcasts from 11 stations, branded as Truly National Radio	Government	<a href="https://www.facebook.com/fm93karachi">https://www.facebook.com/fm93karachi</a>	<a href="http://www.radio.gov.pk/">http://www.radio.gov.pk/</a>
<b>Red FM 93.5</b>	Commercial or Private company	<a href="https://www.facebook.com/redfmindia">https://www.facebook.com/redfmindia</a> <a href="https://www.youtube.com/c/redfmindia">https://www.youtube.com/c/redfmindia</a>	
<b>Planet FM 94</b>	Commercial or Private company	<a href="https://www.facebook.com/planet94">https://www.facebook.com/planet94</a> , <a href="https://www.youtube.com/user/Planet94FM">https://www.youtube.com/user/Planet94FM</a>	<a href="http://www.planet94.com/">http://www.planet94.com/</a>
<b>FM 101</b> FM 101 has a total of 18 stations across the country.	Commercial or Private company	<a href="https://www.facebook.com/FM101karachi">https://www.facebook.com/FM101karachi</a> (Programme schedule can be found here: <a href="https://www.radio.gov.pk/fm-101">https://www.radio.gov.pk/fm-101</a> )	<a href="http://WWW.FM101.GOV.PK/">http://WWW.FM101.GOV.PK/</a>
<b>FM 100</b>	Commercial or Private company	<a href="https://www.facebook.com/fm247365">https://www.facebook.com/fm247365</a> , <a href="https://www.youtube.com/c/FM100Pakistanofficial">https://www.youtube.com/c/FM100Pakistanofficial</a>	<a href="http://www.fm100pakistan.com/">http://www.fm100pakistan.com/</a>
<b>SAMAA FM 107.4</b>	Commercial or Private company	<a href="https://www.facebook.com/samaafm">https://www.facebook.com/samaafm</a> , <a href="https://www.facebook.com/samaafmradio">samaafmradio</a>	<a href="https://www.samaafm.com/">https://www.samaafm.com/</a>
<b>Mast FM 103</b>	Commercial or Private company	<a href="https://www.facebook.com/mastfm103">https://www.facebook.com/mastfm103</a> , <a href="https://www.youtube.com/channel/UCzMd0iXkDjv5a59CbfK_g">https://www.youtube.com/channel/UCzMd0iXkDjv5a59CbfK_g</a>	
<b>Apna Karachi FM 107</b>	Commercial or Private company	<a href="https://www.facebook.com/ApnaKarachi.FM">https://www.facebook.com/ApnaKarachi.FM</a>	<a href="http://www.apnakarachi107.fm/">http://www.apnakarachi107.fm/</a>
<b>Suno FM 89.4</b>	Commercial or Private company	<a href="https://www.facebook.com/sunopakistan">https://www.facebook.com/sunopakistan</a>	<a href="http://www.sunofm894.com/">http://www.sunofm894.com/</a>
<b>FM 91</b>	Commercial or Private company	<a href="https://www.facebook.com/FM91Pakistan">https://www.facebook.com/FM91Pakistan</a> , <a href="https://www.youtube.com/channel/UCjwl-BNpE32QdfvIXWiBQ">https://www.youtube.com/channel/UCjwl-BNpE32QdfvIXWiBQ</a>	<a href="https://www.fm91.com.pk/">https://www.fm91.com.pk/</a>
<b>HOT FM 105</b>	Commercial or Private company	<a href="https://www.facebook.com/hotfm105">https://www.facebook.com/hotfm105</a>	<a href="http://www.hotfm.com.pk/">http://www.hotfm.com.pk/</a>
<b>Power 99</b>	Commercial or Private company	<a href="https://www.facebook.com/powerradio99">https://www.facebook.com/powerradio99</a> , <a href="https://www.youtube.com/channel/UCipK4LMIQQdbj_vO-lp9b-A">https://www.youtube.com/channel/UCipK4LMIQQdbj_vO-lp9b-A</a>	<a href="http://www.power99.live/">http://www.power99.live/</a>
<b>Dhamaal FM 94</b>	Commercial or Private company	<a href="https://www.facebook.com/dhamaal94">https://www.facebook.com/dhamaal94</a>	<a href="http://www.dhamaal94.com/">http://www.dhamaal94.com/</a>
<b>Riphah FM 102.2</b>	Commercial or Private company	<a href="https://www.facebook.com/FM102.2/">https://www.facebook.com/FM102.2/</a>	<a href="http://riphahfm.com/">http://riphahfm.com/</a>



## 4.5 Print

A study conducted by Media Matters for Democracy found that despite the popularity of satellite news channels with 24 hour news transmissions, and interactive social media platforms, news consumers trust newspapers the most.<sup>92</sup> The Audit Bureau of Circulation<sup>93</sup> is the public body responsible for conducting circulation audits of newspapers and periodicals. It lists nearly 1201 registered privately owned and published newspapers and magazines in the country.<sup>94</sup> A more detailed breakdown of dailies, weeklies and other periodicals is available at the Pakistan Bureau of Statistics; with the latest figures dating from 2019.<sup>95</sup> Not all certified publications publish regularly. A listing of live publications can be found on the website of All Pakistan Newspapers Associations (APNS). The listing also includes language and city of publication.<sup>96</sup>

Reliable figures regarding the circulation and market share of different newspapers are not publicly available.

Nevertheless, the popularity of different print outlets can be gauged by the advertisement revenue share that they attract. According to Aurora, 32% of the advertising revenue spent on print media went to Jang Newspaper.<sup>97</sup> Other newspapers that received significant ad revenue were Dawn, Express, The News, Business Recorder, Dunya, Express Tribune and Daily Times. According to data published by All Pakistan Newspaper Society (APNS), the area with the highest number of dailies, weeklies, and monthlies published is Punjab, with a total of 164 and the city in that area with the highest number of publications is its capital Lahore, with a total of 80. Islamabad, the capital city of Pakistan, has a total of 42 listed publications. Sindh has a total of 160 publications, of which 131 are in Karachi. This is the highest number of publications in any one city in Pakistan. The government does not publish any newspapers. However, the Associated Press of Pakistan, one of the major news agencies in the country, is operated by the government.

- » Dawn's English language daily is widely consumed by individuals from all walks of life and is trusted to be one of the most credible sources of news and commentary on current affairs. It is also accessible through its website dawn.com which is one of the top-rated websites in the country, and through its social media accounts.
- » The Jang Group is the leading newspaper media group in Pakistan. The Daily Jang, Jang Group's Urdu daily, is a popular and trusted newspaper. It is an important source of news and information in Pakistan, mostly consumed for news and commentary on current affairs, through both analogue and digital means. It is the oldest newspaper in the country. Daily Jang and the News International are considered an important source of news and information in Pakistan and they are mostly consumed for news and commentary on current affairs, via both analogue and digital means.
- » The express is also a trusted media group and a widely consumed source of news and information. Express Daily (Urdu) and Express Tribune (English) are mainly used for news and commentary on current affairs. Both maintain a strong digital presence through their social media accounts and websites.
- » Nawa-i-Waqt group is a known and trusted source of news and information in the country, and has been operating for more than five centuries. Both the newspapers (Nawa-i-Waqt, Urdu, and the Nation, English) are mainly consumed for news and commentary on current affairs.

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92 <https://drive.google.com/file/d/1atF1FjKAmMjcQ0MO7HY9cTKeLJ68Ar/view>

93 [abc.gov.pk/Detail/MDczMTZlZmYtNDU4OS00OWI5LWEOZTAiYTl0ZmQxNWQxZTg3](http://abc.gov.pk/Detail/MDczMTZlZmYtNDU4OS00OWI5LWEOZTAiYTl0ZmQxNWQxZTg3)

94 Statistics on the website are listed as being last updated in February 2021

95 <https://www.pbs.gov.pk/sites/default/files/tables/rename-as-per-table-type/News%20Paper.pdf>

96 [https://www.apns.com.pk/member\\_publication/index.php](https://www.apns.com.pk/member_publication/index.php)

97 <https://aurora.dawn.com/news/1143946>

Figure 10 Audience data for print media<sup>98</sup>

		Language	Editions
<b>Jang Group</b>	Daily Jang, (Pakistan's most widely circulated daily Urdu newspaper)	Urdu	Karachi, Lahore, Islamabad, Peshawar, Multan, and Quetta.
	The News International, (a trusted source of information in the country)	English	Karachi, Islamabad, Lahore, and Peshawar,
	Akhbar-e-Jahan, Jang's weekly entertainment magazine.	Urdu	
<b>Dawn Media group</b>	Dawn, Pakistan's most widely consumed and trusted English language daily,	English	Islamabad, Karachi, Lahore, and Peshawar
	Herald Pakistan was Dawn group's monthly magazine on politics and current affairs, but it recently ceased publication,	English	
	Aurora Magazine, a marketing and advertising bi-monthly magazine.	English	
<b>Express</b>	Express	Urdu	Islamabad, Karachi, Lahore, Multan, Gujranwala, Faisalabad, Sarghoda, Rahim Yar Khan, Peshawar, Quetta, and Sukkhar
	Express Tribune, a widely consumed English language daily, and Pakistan's only publication affiliated with the International New York Times.	English	
<b>Nawa-i-Waqt group</b> <b>Nawa-i-Waqt group</b>	The Nation -daily	English	Lahore, Islamabad, Multan, and Karachi.
	The Nawa-i-Waqt -daily	Urdu	Islamabad, Lahore, Multan, Karachi, Quetta, and Gujranwala.

#### 4.6 Traditional (Non-Electronic Or Mass Media) Forms Of Communication

Community mobilisers and communication through traditional Shura meetings and religious leaders can play a key role in communication and information provision. As part of the COVID-19 response, UNICEF Pakistan engaged and mobilised 74,442 religious leaders, and public health messages have been preached at mosques, especially during festivals. Outreach volunteers and community mobilisers provide information on COVID-19 prevention and referral mechanisms through WhatsApp and telephone counselling. Health workers have reached 35 million people, using mobile microphones on motorbikes in rural communities, or mosques before the call for prayer.<sup>99</sup> Religious programming is popular in Pakistan and the country has at least 21 religious TV channels, including Christian and Muslim. Mobile-based voice and text services continue to be a vastly popular medium for mass communication and messaging.

<sup>98</sup> [https://aurora.dawn.com/news/1143946?fbclid=IwAR2Lfp4g0CtDqHl0jt3yRr6MdGwYrqzlkVHc80Cu\\_y6wmPW0ClqR9vss](https://aurora.dawn.com/news/1143946?fbclid=IwAR2Lfp4g0CtDqHl0jt3yRr6MdGwYrqzlkVHc80Cu_y6wmPW0ClqR9vss); <https://www.thenews.com.pk/print/417374-unlicensed-religious-tv-channels-mushrooming-on-cable>; [https://pemra.gov.pk/uploads/pub-rep/pemra\\_annual\\_report\\_19-20.pdf](https://pemra.gov.pk/uploads/pub-rep/pemra_annual_report_19-20.pdf); <https://www.pla.gov.pk/index.php/en/telecom-indicators> further details from <https://www.apns.com.pk/>

<sup>99</sup> <https://www.unicef.org/media/105586/file/Pakistan%20Humanitarian%20Situation%20Report%20No.27,%2031%20>

## 4.7 Media Training Opportunities

There is no mandatory educational requirement for becoming a journalist in Pakistan and many media practitioners, especially in the print media, do not have formal training. However, the need for formal education has become more critical, given the expansion of radio and television journalism. In 1941, the University of Punjab in Lahore started the first department of journalism in the Indian Subcontinent. Now called Institute of Communication Studies, it offers bachelors, masters, M. Phil and Ph.D. programmes in Communication Studies. Karachi University established a department of journalism in 1955. Journalist training programmes started in Gomal University in Dera Ismail Khan in 1974 and the Department of Mass Communication was established at Sindh University, Hyderabad, in 1977. The Department of Mass Communication opened at the distance-learning Allama Iqbal Open University in 1986 and at the University of Balochistan, Quetta, in 1987. The Department of Journalism and Mass Communication at the University of Peshawar started offering a master's programme in 1988, and a master's programme was introduced at Bahauddin Zakari University in 1991.

Numerous other public universities and colleges have since started departments of journalism. In almost all major cities private institutions also offer journalism courses. The quality of education, faculties and the curriculum vary widely.<sup>100</sup> A list of current courses at all levels can be found on the eduvison website.<sup>101</sup> The main private institutions offering training are listed in the table below (the courses mentioned are largely one-offs and may not be recurring).

Figure 12 Training organisations and courses

Name of Training organisation	location	Weblink	Level of qualifications offered	Courses offered
Media Matters for Democracy (MMFD)	Islamabad	<a href="http://www.mediamatters.pk">www.mediamatters.pk</a>	Certificate	Investigative and data journalism, countering and investigating disinformation, citizen journalism, digital safety and security for journalists, development journalism (solutions-based journalism).
Pakistan Press Foundation (PPF)	Karachi	<a href="https://www.pakistanpressfoundation.org">https://www.pakistanpressfoundation.org</a>		Reporting COVID-19 and countering misinformation on vaccines
Centre for Peace and Development Initiatives (CPDI)	Gender-sensitive reporting			
Centre for Excellence in Journalism (CEJ)	Islamabad	<a href="https://www.peaceinsight.org/en/organisations/cpdi-pakistan/?location=pakistan&amp;theme">https://www.peaceinsight.org/en/organisations/cpdi-pakistan/?location=pakistan&amp;theme</a>		Ethical reporting on marginalised communities
Digital Rights Foundation (DRF)	Karachi	<a href="https://cej.iba.edu.pk">https://cej.iba.edu.pk</a>		Ethical reporting on marginalised communities
Women Media Centre (WMC)	Lahore	<a href="https://www.pakistanpressfoundation.org/">https://www.pakistanpressfoundation.org/</a>	Certificate	Investigative journalism
Institute for Research Advocacy and Development (IRADA)				
	Physical and digital safety training for journalists.			
	Karachi	<a href="http://www.wmcpk.org/wp/home/">http://www.wmcpk.org/wp/home/</a>		Thematic journalism training"
	Islamabad	<a href="https://www.cpdi-pakistan.org/">https://www.cpdi-pakistan.org/</a>	Certificate	Physical safety training for journalists, Right to Information, free, independent and responsible reporting.

<sup>100</sup> <https://medialandscapes.org/country/pakistan/education/universities-schools>

<sup>101</sup> <https://www.eduvison.edu.pk/institutions-offering-media-studies-with-field-media-studies-at-bachelor-level-in-pakistan-page-1>



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