

Pakistan

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Overview

Until the dawn of the 21st century, the Pakistani media landscape comprised almost entirely of print media publications. The only exceptions were two state-owned electronic media entities – a national television broadcaster (*Pakistan Television*) and a public radio (*Radio Pakistan*).

The government's monopoly over radio and television ended in 2002 when the electronic media liberalisation led to scores of private electronic media platforms to begin operations. Since then TV news channels and, to a lesser extent, radio appear to have become key sources of news and information for a considerable proportion of the population in Pakistan.

A number of print media organisations operating prior to 2002 expanded to include TV and radio platforms, but many new entrants also benefited from the ending of the state monopoly on the airwaves.

Many of Pakistan's established newspapers were founded by journalists with a political or nationalist agenda. However, after the liberalisation of broadcasting in 2002, there has been common criticism towards commercial interests gaining prominence in the media and professional journalism giving way to sensationalism. A large proportion of those working in the news media do not generally get formal training or education to work as journalists. Media schools curricula also do not sufficiently focus on the requisite training needs. Lack of basic training for media practitioners, including those in the field, has been linked not only to biased, unethical or unprofessional journalism but also to safety issues and vulnerabilities for journalists.

Pakistan's is a multi-linguistic media landscape with clear urban-rural disparities. Urdu-language publications have greater reach than those in any other language. The English print media readership is far smaller in comparison but its publications have considerable leverage among opinion makers. The English print media is urban-centric and generally tends to be more progressive. There are currently no Pakistani English-language TV channels or radio stations. Regional-language media boast varying level of influence confined largely to their specific regions.

The footprint of the mass circulation press has been small in Pakistan, and it seems to be shrinking further amid the growth of the electronic media.

Political reporting forms the bulk of the coverage of many print and TV news outlets. This has been most pronounced around elections and important judicial decisions with implications for political entities. Live and prolonged TV coverage of rallies benefits political parties.

Pakistan has long had some tradition of political parallelism. Some political parties have published their own newspapers; the better known examples include daily *Jisarat* and daily *Masawat*, owned by Jamaat-e-Islami and Pakistan People's Party, respectively.

Even in absence of direct ownership of or connections to political entities, an inclination in the news media content to support one political party or another can sometimes be discerned, be it for ideological reasons, economic interests or other considerations.

At times, some TV talk show hosts have been well-known leaders of political parties and have used their programmes to defend and promote the policies of their parties and censure those of other parties.

Proliferation of Internet connectivity has facilitated users' access to conventional media and social media. However, growing Internet penetration has not necessarily led to Internet freedom. In 2016, Washington DC-based research firm Freedom House ranked Pakistan among the worst 10 countries for Internet freedom. Fundamental freedoms for citizens and the media in Pakistan have generally been far from assured. In the country's uneven history in terms of media freedoms, General Zia's martial law (1978-1988) is generally considered to be the period of the most stringent curbs and excesses against the media and media practitioners at the hands of the state.

The state's role as an owner of media platforms is today limited to the *Pakistan Television* and *Radio Pakistan* channels, but the government has a considerable role as a regulator and its advertisements are an important source of revenue for many news outlets.

The print and electronic media require official permission or licences in order to start operating. State regulators can fine and otherwise penalise media organisations for printing or airing 'objectionable' content. The regulator can also suspend or block access to social media websites.

Government advertisements represent an important revenue source for many media outlets. News media organisations have often decried the use of government advertisement as a leverage and the withdrawal of ads as a tool to punish unfavourable coverage.

Pakistan's media landscape will be incomplete without a mention of the work-related violence and threats of violence for the media practitioners. In fact, international media safety watchdog Committee to Protect Journalists (CPJ) has counted Pakistan among the top 10 most dangerous countries for journalists in the world in all but five years since 2000.

Between 2000 and 2016, as many as 105 journalists were killed in Pakistan on account of their work. This represented one of the highest fatality rates for journalists in any country for this period. Out of these cases, the killers have been identified and successfully prosecuted in only two cases. As things stand, Pakistan is among the countries considered least likely to punish media murders. In 12 of the last 15 years, CPJ ranked Pakistan among 10 countries with the highest levels of impunity for perpetrators of crimes against journalists.

It has been argued that attacks on media organisation offices and violence against and intimidation of journalists and the attending impunity have contributed to an environment of self-censorship. The news media appears to have grown increasingly cautious of covering news of sensitive issues such as blasphemy and violation of rights of religious minorities.

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Print

Daily newspapers and periodicals have been the oldest and, until 2003, the most recognizable face of Pakistan's media landscape. The struggle for freedom of expression and free media in Pakistan through the years has also largely been synonymous with the efforts of print media journalists. Other media forms have also benefited from the fruits of that struggle.

According to Pakistan Bureau of Statistics (PBS), the number of newspapers and periodicals in the country stood at 539 in 2016, down from 1,820 in 2007. There were 308 daily newspapers in 2016, compared to 437 in 2007, 72 weeklies (463 in 2007), 18 fortnightlies (92 in 2007), 137 monthlies (686 in 2007) and three quarterly publications in 2016 (compared to 71 in 2007).

According to data by All Pakistan Newspapers Society (APNS), an organisation of major Pakistani newspapers owners, 378 of its member newspapers were printed daily. Out of the 458 APNS member publications nationwide, 19 were weekly, four fortnightly and 61 monthly publications.

The PBS noted that the average combined daily circulation of Pakistani newspapers fell from 9.9m in 2007 to 6.1m in 2008. This included a circulation of 4.6m for Urdu, 670,743 for English and 640,897 for Sindhi newspapers and periodicals.

Reliable recent figures on print media circulation or market share have been difficult to come by, but circulation of print media organisations generally seems to be in decline.

A range of reasons have been cited for low circulation of newspapers, including low literacy levels and a perception that the print media does not adequately reflect issues of concern for the masses, especially those outside a few main cities.

Anecdotal evidence suggests that newspapers are often shared communally and a single newspaper copy may be read by multiple readers in public spaces.

The state used to own a number of daily newspapers but those were sold or liquidated in the early 1990s. Today the government publishes no daily newspaper. However, it controls the Associated Press of Pakistan, one of the major news agencies.

After the arrival of the Internet, all leading newspapers, including *Jang*, *Nawa-i-Waqt*, *Dawn*, *The Nation*, *The News* and *Business Recorder*, have also started relying on online delivery mechanisms to reach their audience. Almost all major newspapers have also launched TV news channels.

The political leanings among the print media are generally not very apparent, although political slants are visible and government bashing often exceeds what many might consider objective coverage.

The advent of new media has expanded the competition for audiences, and advertisement revenue.

According to *Aurora*, Pakistan's main advertising magazine, total advertisement revenue across mediums increased by 14 percent, from Pak rupees (PKR) 66.9bn in financial year (FY) 2014-15 to PKR76.2bn in FY 2015-16. The total advertising revenue in FY 2015-16 included PKR38bn for TV, which was 50 percent of the total, PKR18bn (23 percent) for print, PKR8.9bn (12 percent) for out of home (OOH) advertising, PKR4.5bn (6 percent) for digital and PKR2.8bn (4 percent) for radio. A two-year (2015-2016) comparison of percentage share per medium showed 1 percent decline each for print and OOH and 1 percent increase for digital. There was no change for TV and radio.

In FY 2011-12, the top five newspapers in terms of print media advertisement revenue were *Jang* with PKR3.45bn revenue (31 percent of total print ad revenue), *Dawn* with PKR1.87 (17 percent), *Express News* with PKR0.86bn (8 percent), *Nawa-i-Waqt* with PKR0.76bn (7 percent), and *The News* with PKR0.731bn (7 percent).

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Radio

The history of radio in Pakistan is as old as the country itself. However, until the turn of the century *Radio Pakistan*, which was run by the state-owned Pakistan Broadcasting Corporation (PBC), had monopoly of the airwaves.

In 2002, Pakistan Electronic Media Regulatory Authority (PEMRA), a statutory body regulating the private electronic media, was established and it became possible for privately owned FM radios and television channels to operate.

By the end of 2017, PEMRA had issued 143 commercial FM radio licences across the country. Another 45 FM licences had been issued to non-commercial entities, mainly campus radios.

Additionally, a total of 62 radio channels of the state-owned PBC today cover 98 percent of the population and 80 percent of the total area in Pakistan. These include 40 FM and 22 AM stations. The AM channels include five current affairs channels.

PBC, which runs the state radio network, has official monopoly on broadcasting national and international radio news. Private radio stations are allowed to relay the news bulletins of PBC and, to a lesser degree, the BBC Urdu service and Voice of America.

The FM licences granted by the government do not permit private radio stations to broadcast their own news and current affairs programmes. The listeners have to depend on state-owned radio channels for news via radio. Some private channels are allowed to broadcast local news.

In Pakistan's rural areas, where access to or affordability of television is limited, there has traditionally been considerable reliance on radio. Private radio has limited penetration in rural areas, where the PBC-run channels *Radio Pakistan* and *FM 101* have a virtual monopoly of radio audiences. With the FM radio opening up to private acquisition in the early 2000s, music, phone-in and other entertainment programmes on the radio have managed to attract an urban and relatively young audience.

Radio audience has multiplied with the spread of phones equipped with FM radio receivers in Pakistan. This helps explain overall radio use among young Pakistanis, who are more likely than their elders to use their phones to listen to the radio. Car users also form an important part of the listener base.

According to *Aurora*, out of the total advertising revenue of PKR76.2bn across all media in the country in FY 2015-16, radio's share was PKR2.8bn (4 percent).

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Television

The story of television in Pakistan is in certain respects similar to that of radio. State-owned *Pakistan Television* (PTV), remained the only TV channel in the country for a long time. It was only after the establishment of PEMRA that privately owned TV channels were permitted to operate.

An important distinction, however, was that unlike radio stations, dozens of private TV channels were allowed to broadcast their own news and current affairs programmes.

In the 16 years since private TV channels began operating, television has become the dominant medium and the medium of choice not just for accessing news but also infotainment and entertainment content. Wherever television is available, most Pakistanis seem to prefer it to radio as a source of information.

As of late 2017, 89 satellite TV licences had been issued by PEMRA. Another 29 foreign channels had been granted landing rights.

At least 30 private TV channels, prominent among them *Geo News*, *Dawn News*, *Aaj TV*, *ARY News*, *Capital TV*, *Samaa*, *Dunya News*, *Waqt News*, and *Express News*, exclusively broadcast news and current affairs programmes. Many print media organisations operating prior to 2002 expanded to include TV news platforms. Almost all TV news channels maintain their websites, which include news coverage from their main platforms.

While the broadcasts of the clear majority of news and entertainment channels are in Urdu, transmissions of a number of TV channels are in regional languages, such as Pashtu, Sindhi, Balochi, Punjabi and Seraiki.

The country's first English-language news channel, *Dawn News*, started test transmissions in May 2007 and went live in July the same year. In May 2010, it started only Urdu broadcasts due to financial reasons related to thin viewership for English-only content in the country. *Express 24/7*, the only other English-language television channel to be established in Pakistan, remained the only 24-hour English-language news channel in Pakistan until its closure in November 2011. The proprietors cited difficult economic circumstances and insufficient advertisements as the reasons for the closure.

According to Gallup Pakistan, the Pakistani affiliate of Gallup International Association and a pioneer in media research, at the end of 2016 on average a Pakistani TV viewer spent two hours a day watching television.

Many sections of the TV news media have faced strong criticism for an inclination for breaking the news first at all cost and engaging in what can only be described as sensationalism.

The news media coverage of politics at times does not have a moderating role and delves into subjectivity. Some TV talk shows proceed to discuss and condemn a certain organisation, institution or political party's policies or decisions, often without inviting representatives from or seeking the stance of that institution.

At times, some TV talk show hosts have been well-known leaders of political parties and use their programmes to defend and promote the policies of their parties and censure those of other parties.

Private TV channels are only authorised to broadcast content by cable and satellite and not via terrestrial transmitters. That has contributed to a smaller footprint for the private television channels in rural Pakistan. Only the channels of the state-run *PTV* use terrestrial transmission, which has enabled *PTV* to maintain its domination of rural TV audiences.

The Pakistani television sector has quickly managed to overtake other mediums in terms of both audiences and revenue. Gallup Pakistan estimated that there were 86 million TV viewers in Pakistan in 2009. Out of these, 48 million were terrestrial viewers who could only receive *PTV* channels.

The popularity of direct satellite television has gradually waned. TV news and entertainment channels depend almost entirely on cable networks to reach the audience. Almost all of the electronic media revenue is generated through on-air advertising. Cable networks do not pay anything to the channels for transmitting their content. The channels do not charge any subscription fee from the end consumer either.

In the total advertisement revenue of PKR76.2bn for all mediums in the country in FY 2015-16, half (PKR38bn) went to TV channels while the rest was divided among other mediums. Among the TV channels, the top earners were *Hum TV* (PKR3.84bn), *ARY Digital* (PKR3.80bn), *PTV Sports* (PKR3bn), *Geo Entertainment* (PKR2.93bn) and *Geo News* (PKR2.6bn). The advert income share included PKR2.5bn each for *PTV Home* and *Urdu1*, PKR1.9bn for *Samaa*, and PKR1.8bn each for *ARY News*, *Dunya News* and *Express News*.

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