

BBG Research Series

BBG Broadcasting
Board of
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Pakistan: Audience Realities in an Unstable Media Landscape

Pakistan at a Glance

Findings from the World Poll



Attitudes and Opinions on Pillars of Democracy

OPPORTUNITIES

- Life evaluation
- Jobs

BASIC FREEDOMS

- Freedom in life
- Media freedom
- Children respected

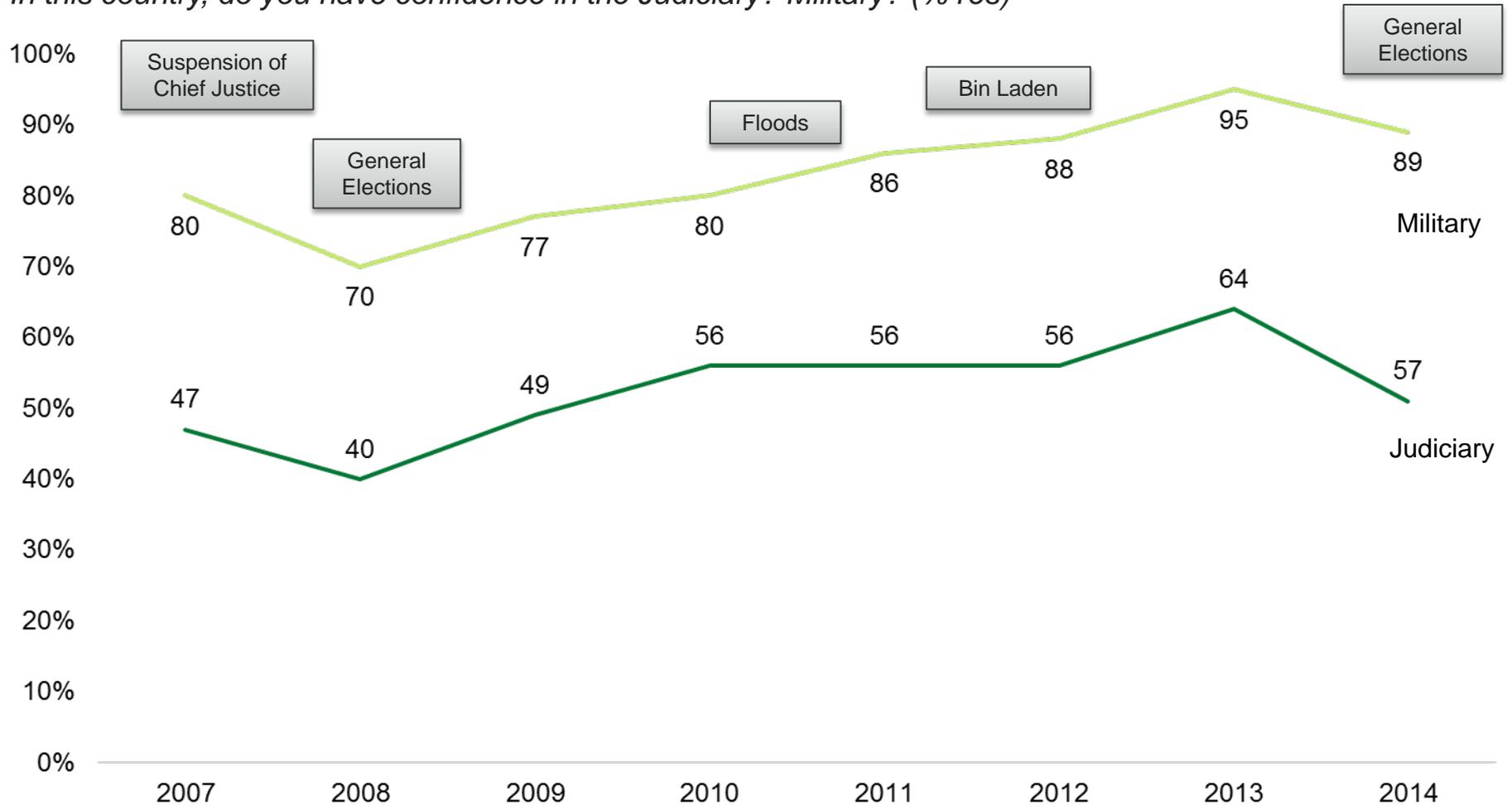


FUNCTIONING INSTITUTIONS

- Confidence in national government
- Confidence in leadership
- Confidence in judiciary
- Honesty of elections
- Confidence in military

Confidence in Military High

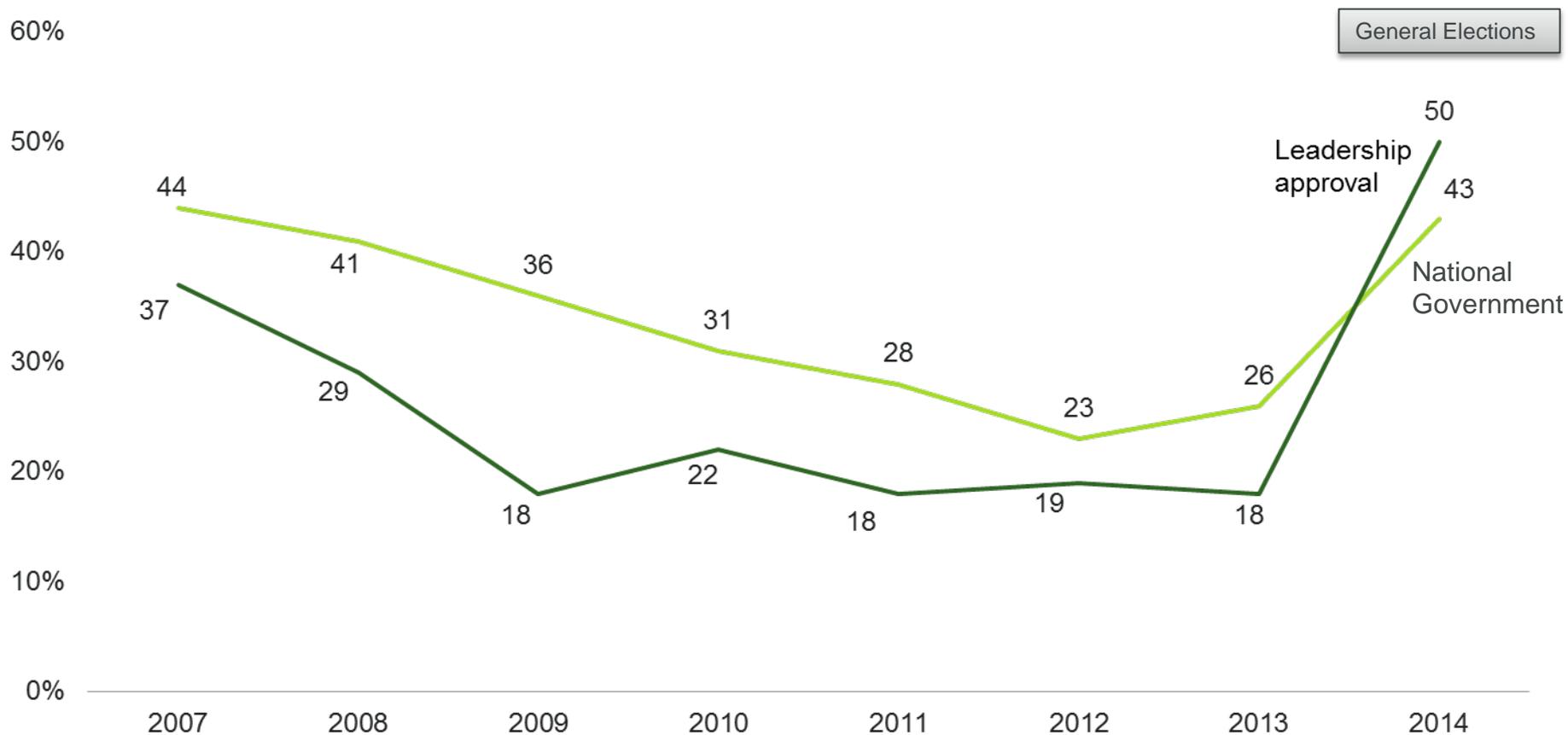
In this country, do you have confidence in the Judiciary? Military? (%Yes)



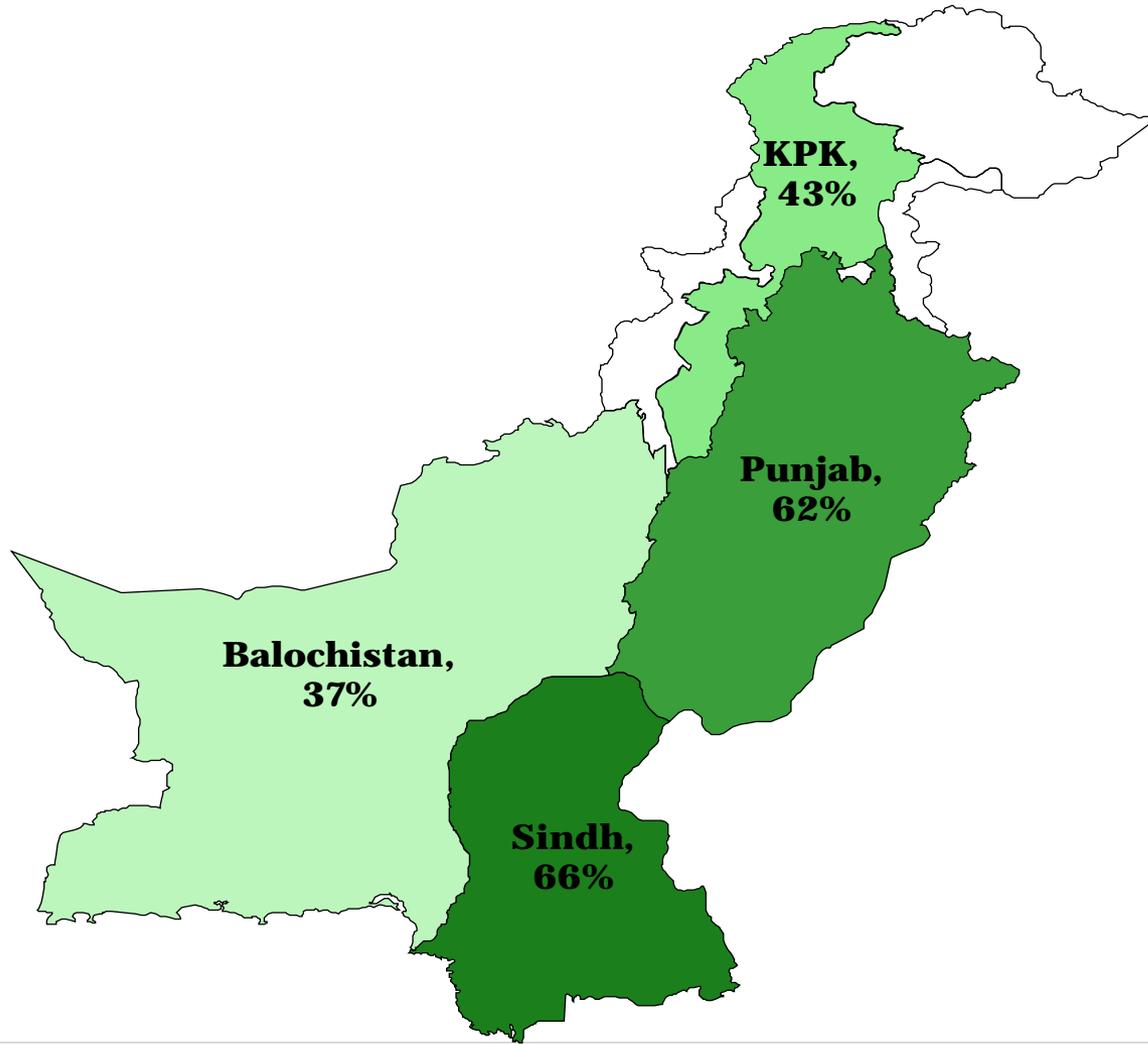
Increase in Confidence in National Government and Leadership

In this country, do you have confidence in the National government? (%Yes)

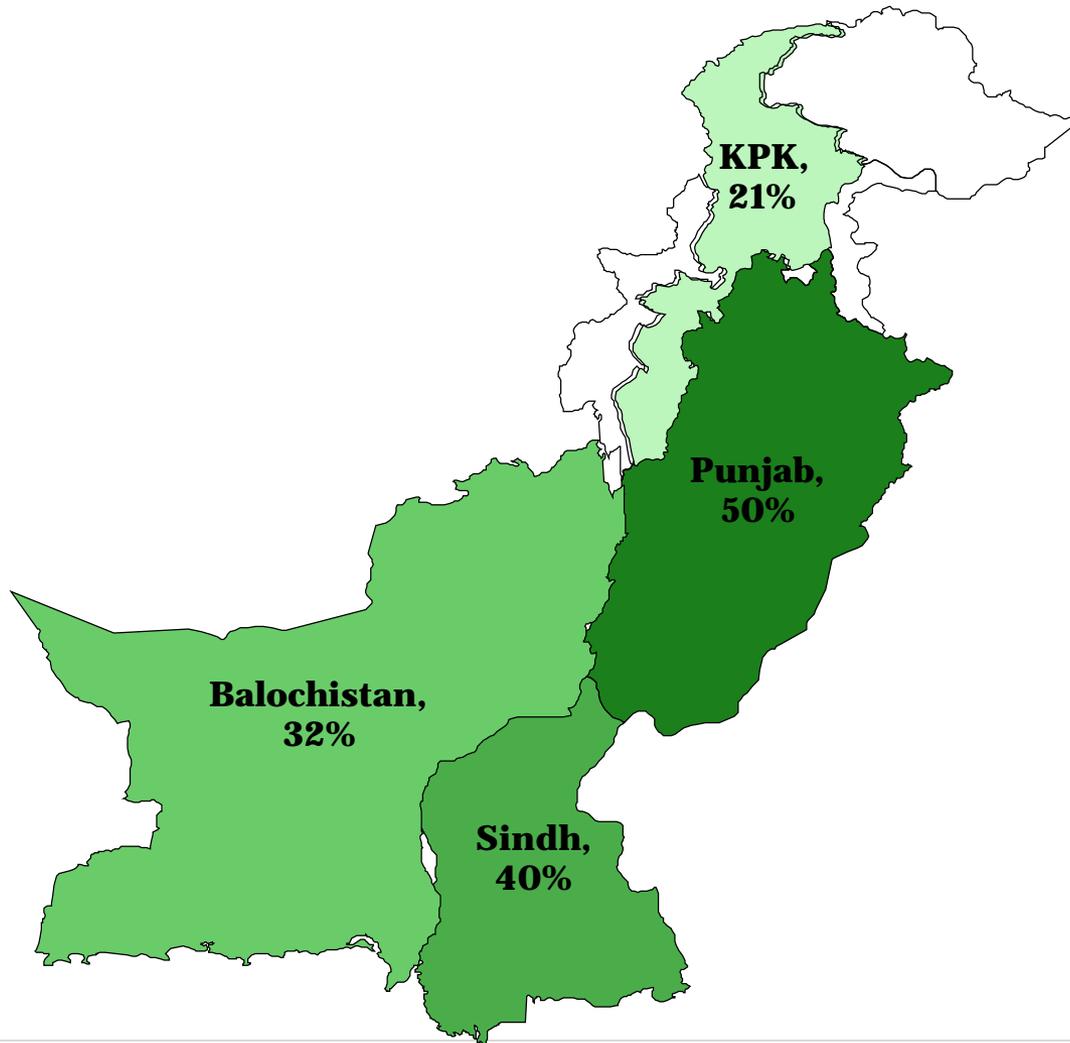
Do you approve or disapprove of the job performance of the leadership of this country? (%Approve)



Regional Variation in Confidence in Leadership - 2014

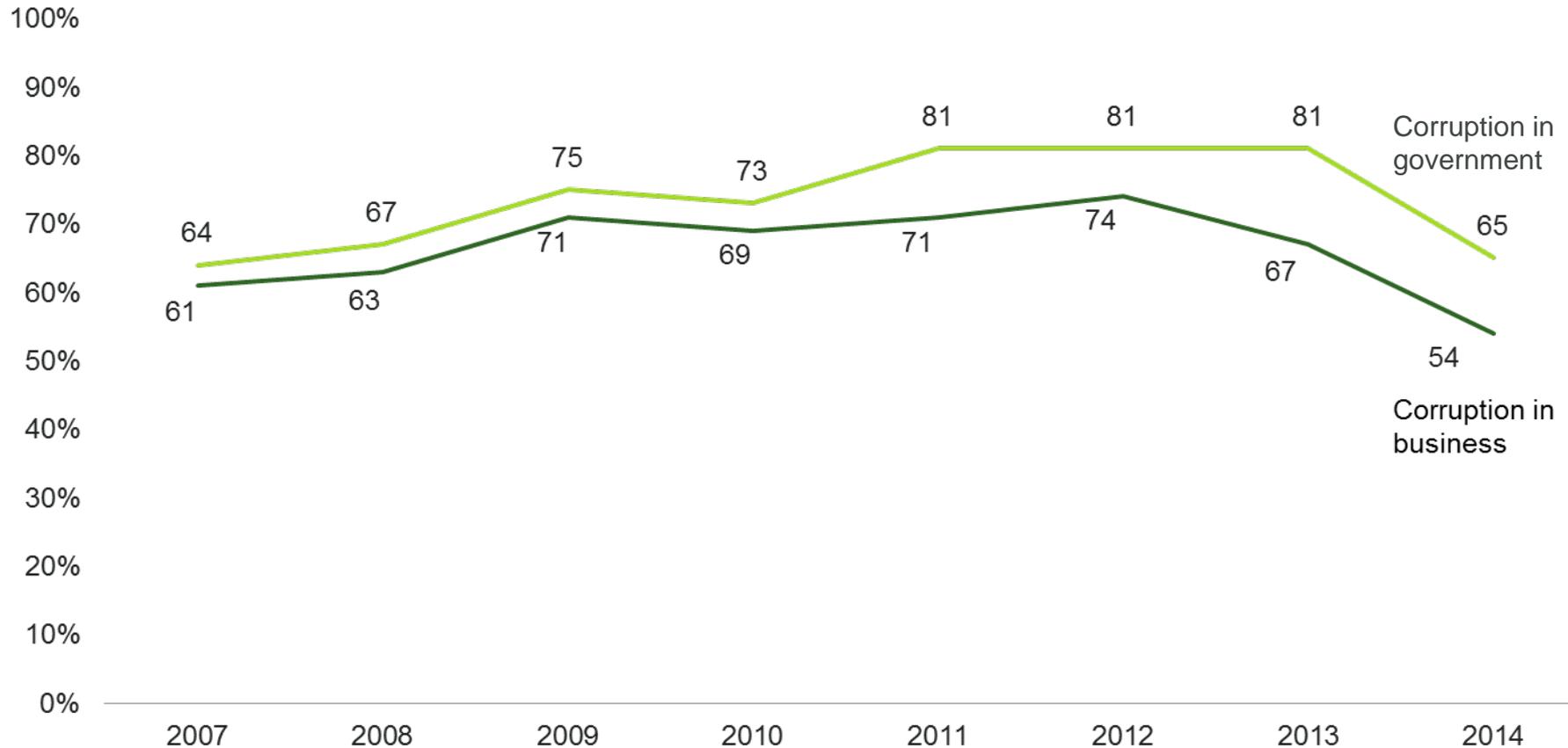


Regional Variation in Confidence in National Government - 2014



Improvement in Perceptions around Widespread Corruption in Business and Government

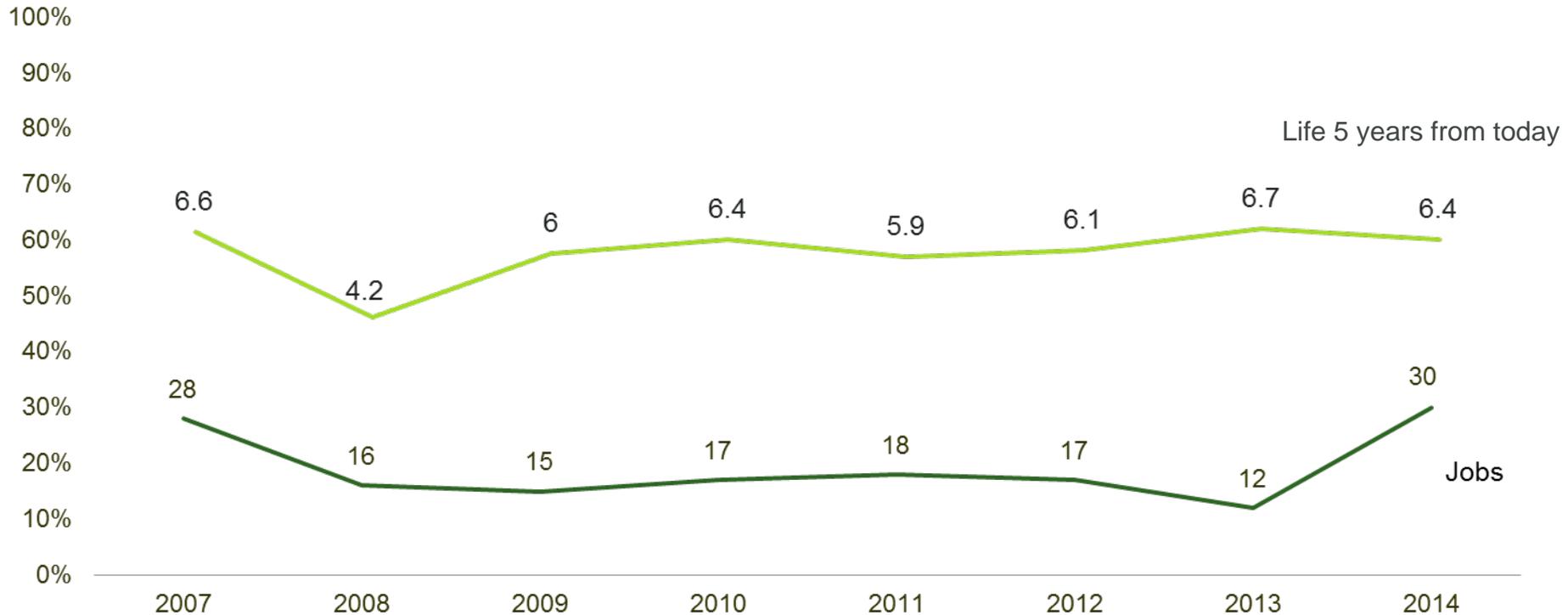
Is corruption widespread throughout the government/business in this country? (%Yes)



Increase in Perceived Job Situation

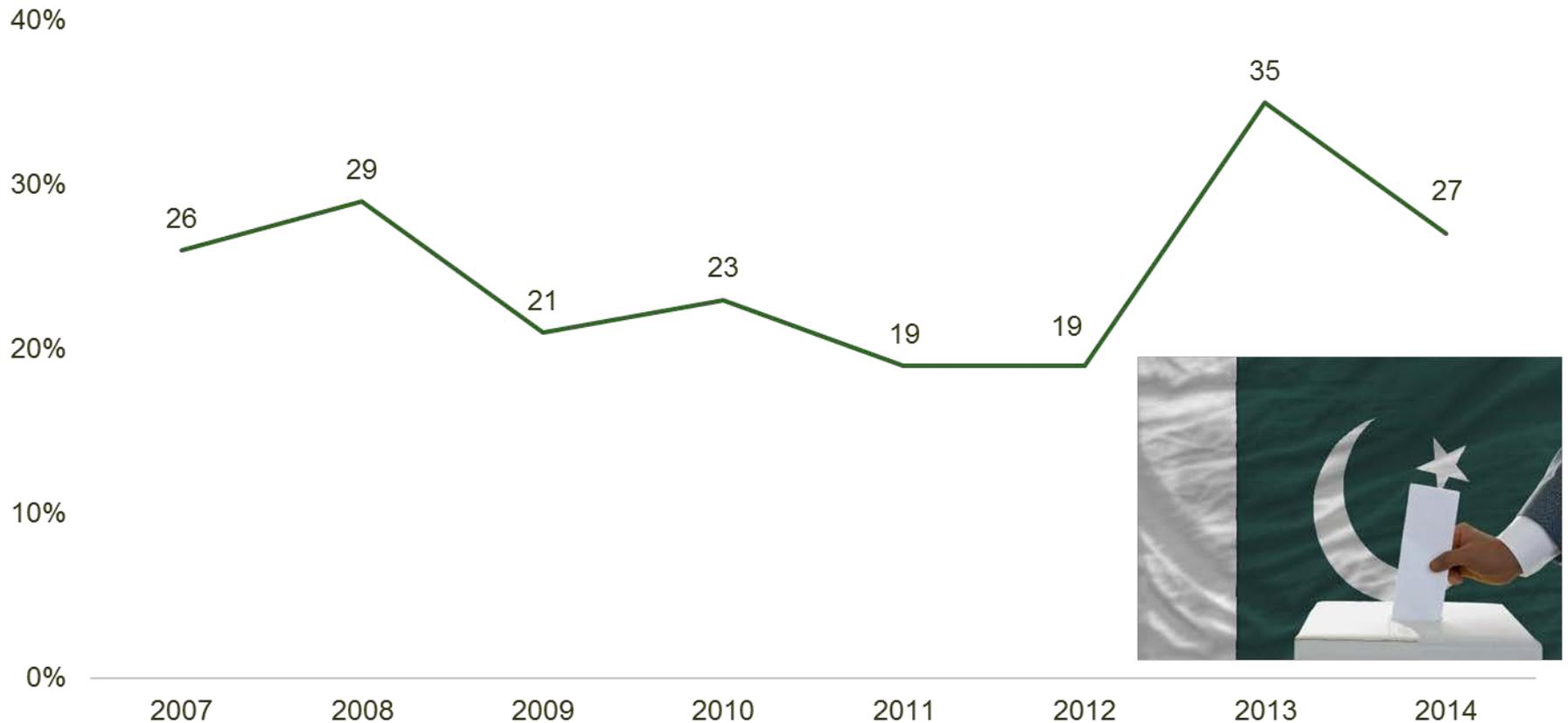
Thinking about the job situation in the city or area, is now a good time or bad time to find a job? (%good time)

Please imagine a ladder with steps numbered from 0 to 10, On which step do you think you will stand 5 years from now? (mean rating)

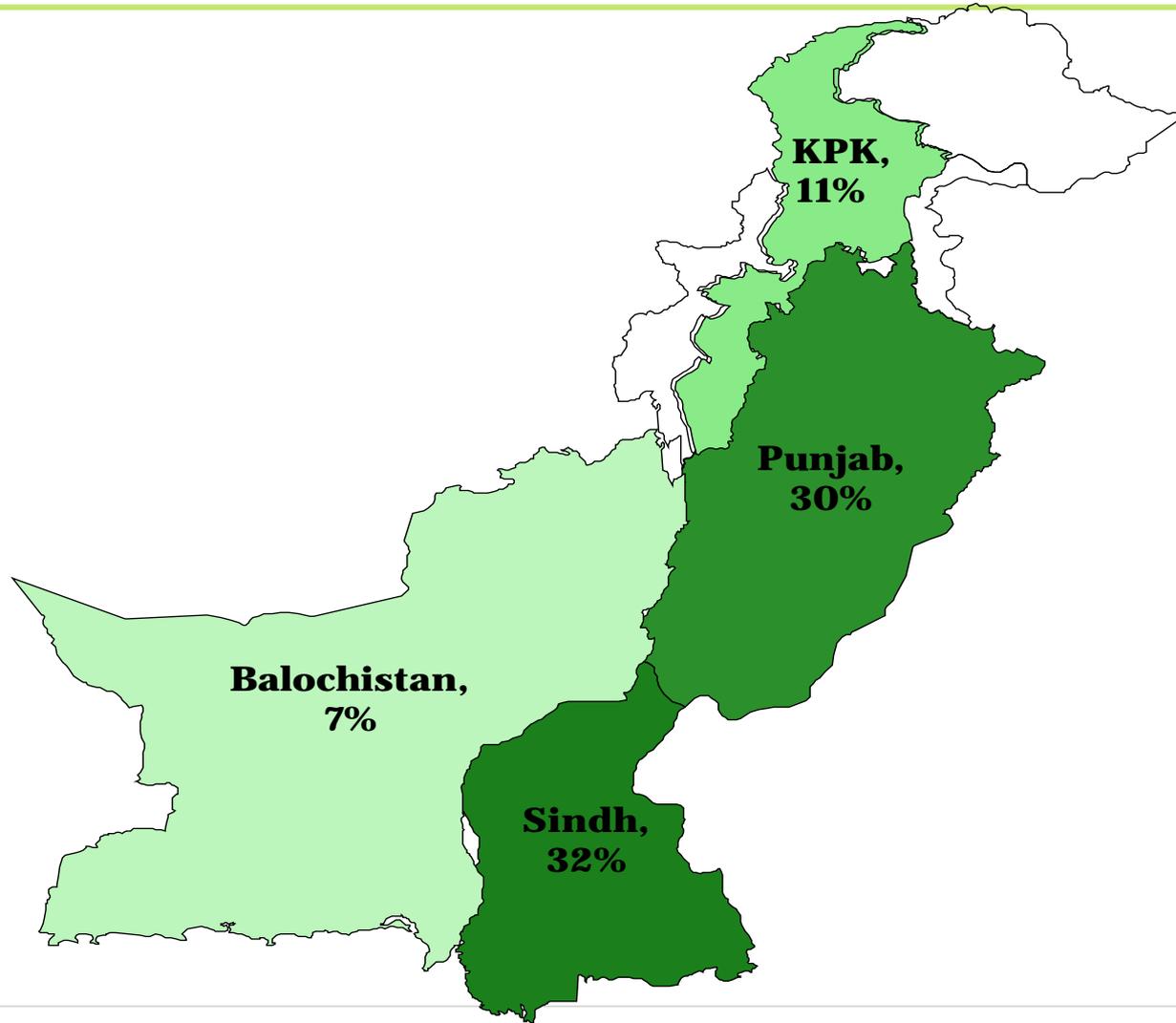


Majority Lack Confidence in the Honesty of Elections

In this country, do you have confidence in the honesty of elections? (%Yes)



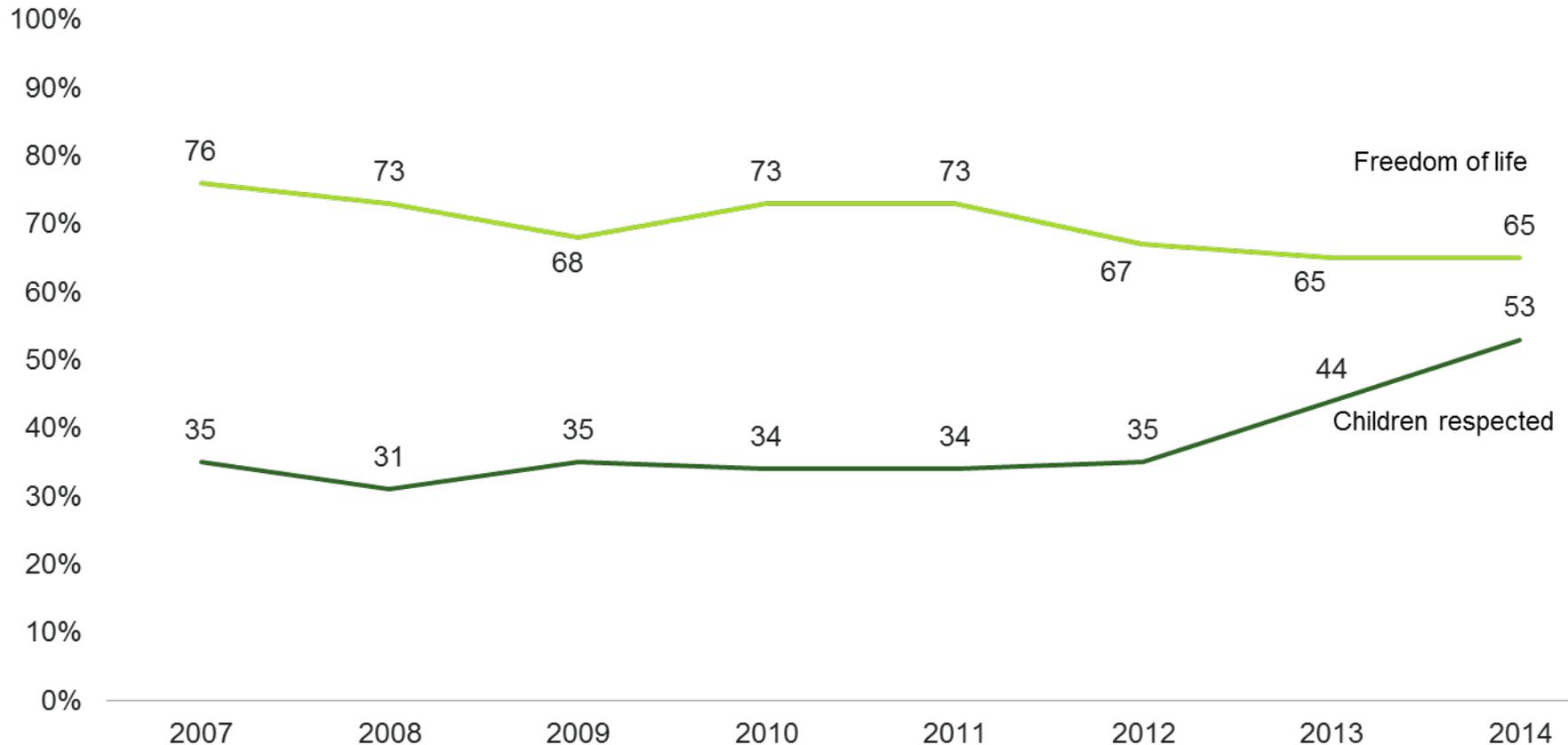
Confidence in Honesty of Elections, Low in Punjab



Improvements in Satisfaction with Personal Freedom

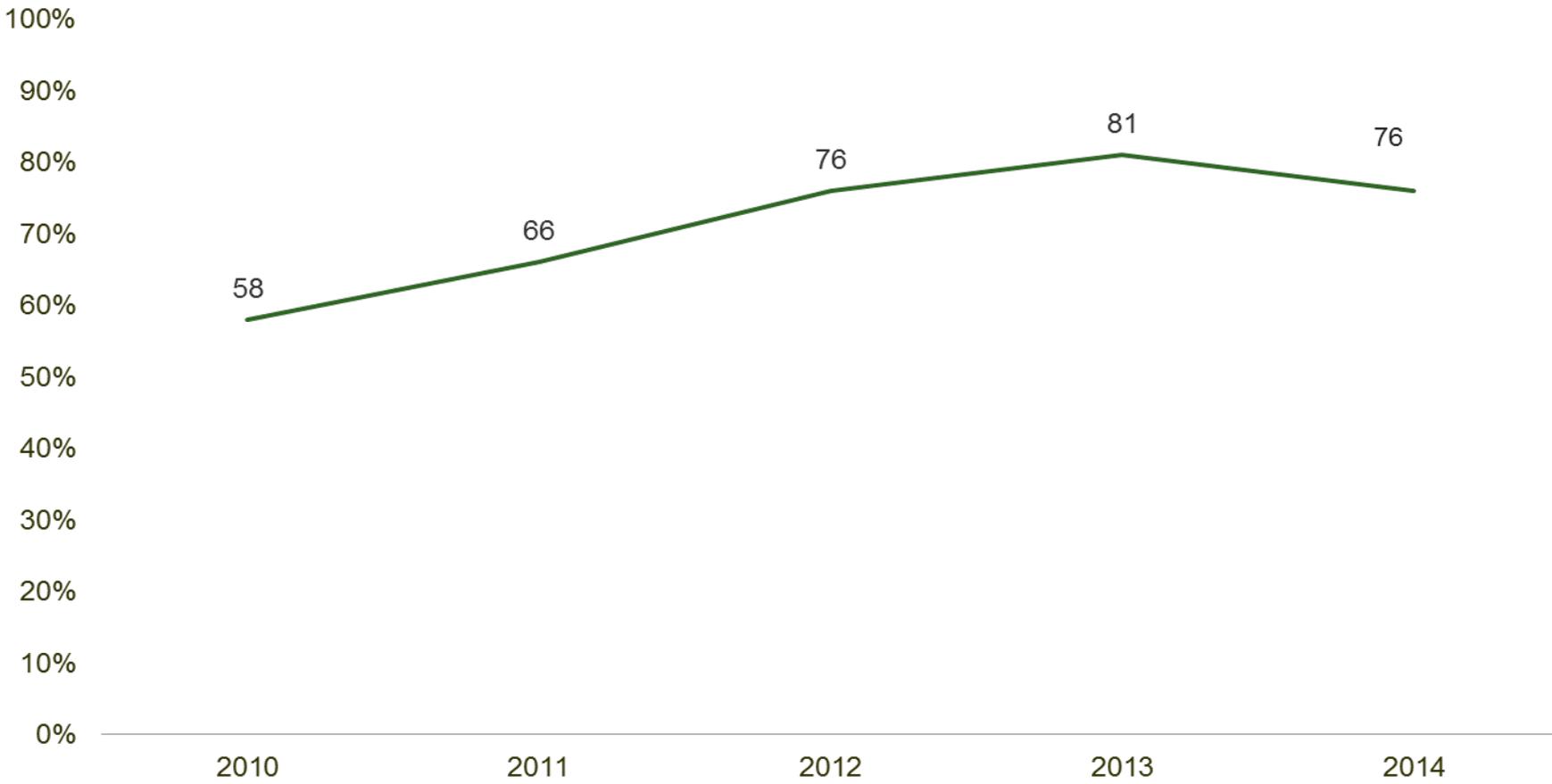
In this country are you satisfied or dissatisfied with the freedom to choose what you do with your life? (%Satisfied)

In this country are children treated with respect or not? (%Yes)



Significant Majority View Media as Having a lot of Freedom

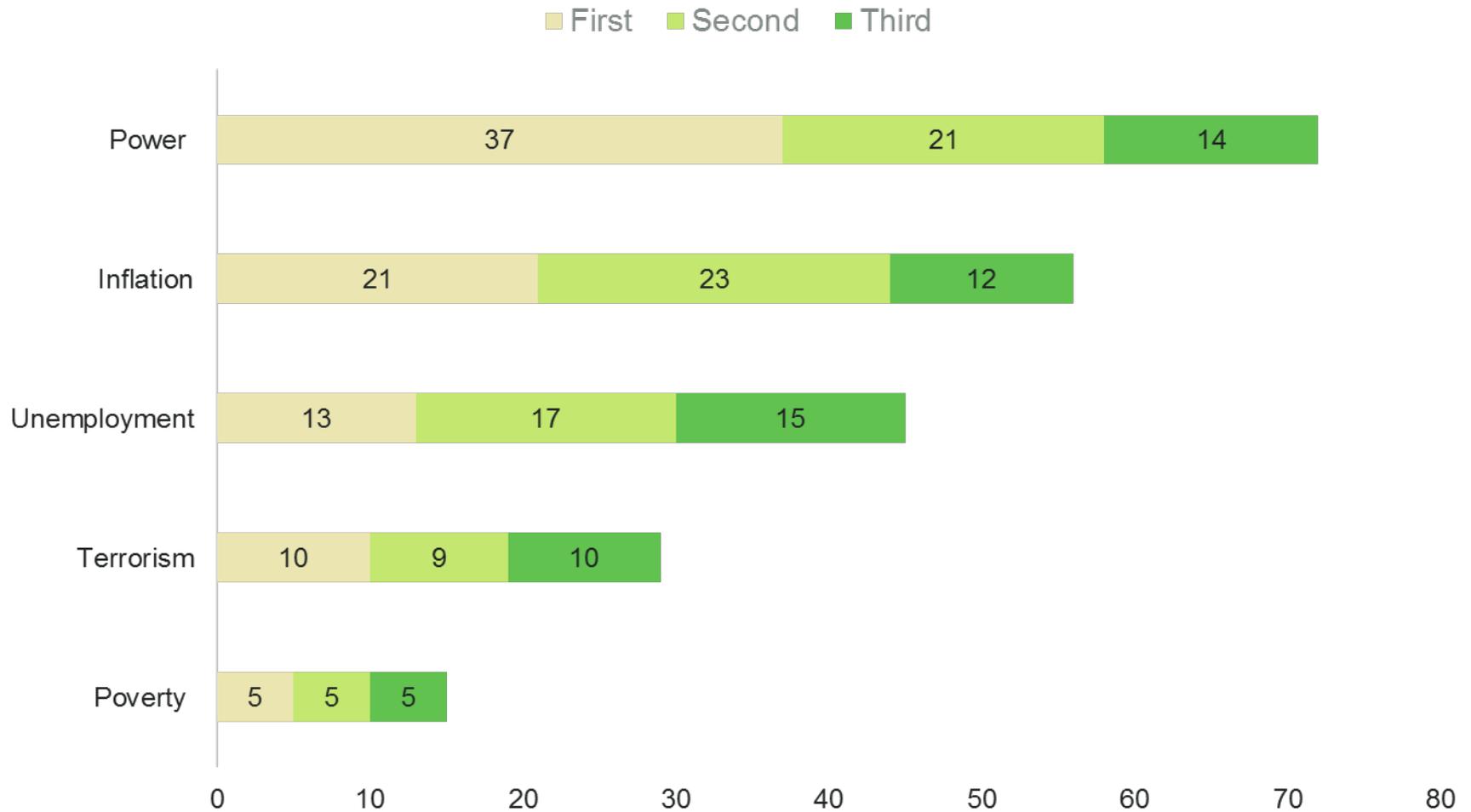
Do the media in this country have a lot of freedom or not? (%Yes)



An Overview of Pakistani Media

- Information platforms
- Usage of main channels
- Regional variations
- Trust in media
- Digital, mobile, and social media

Most Important Problems Facing Pakistan

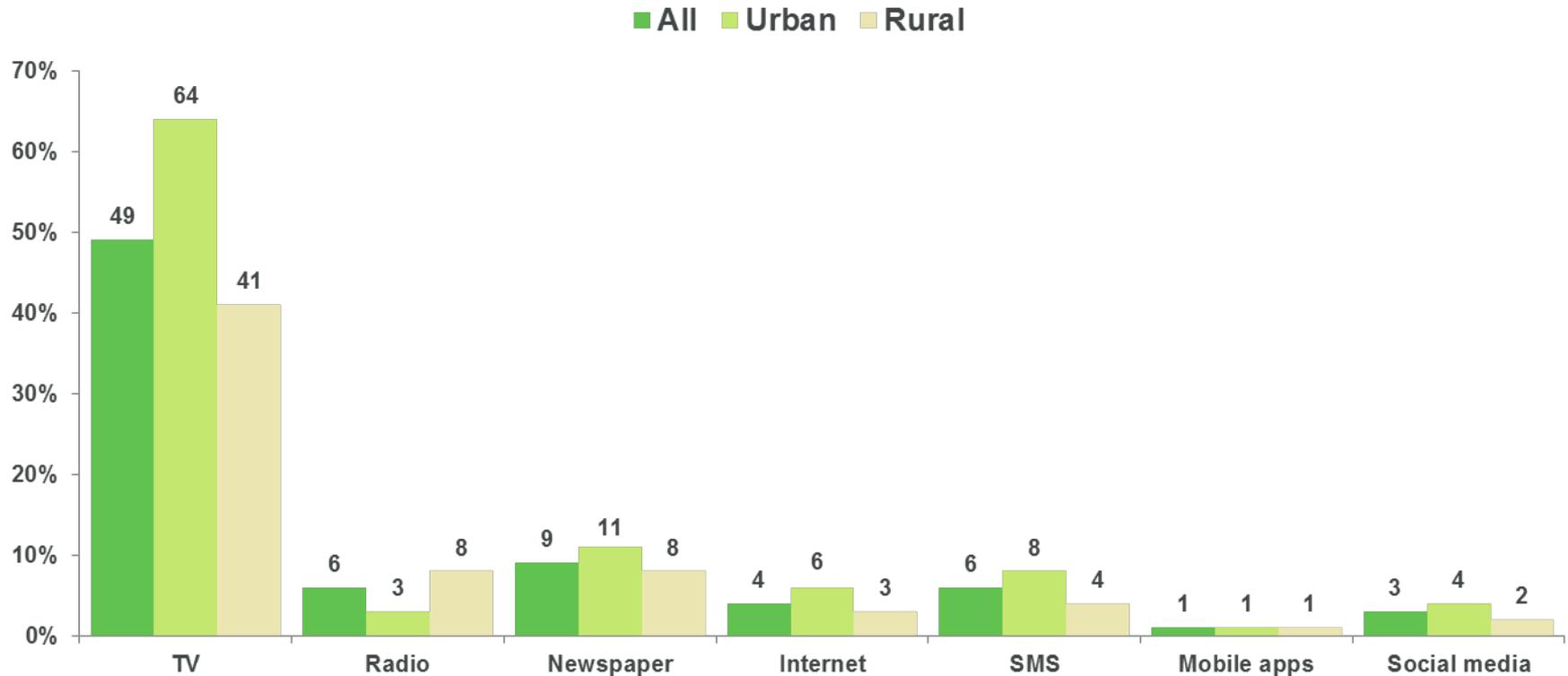


Base: All respondents. Percentage mentioning each problems as first, second, or third most important

Where Pakistanis Get Information

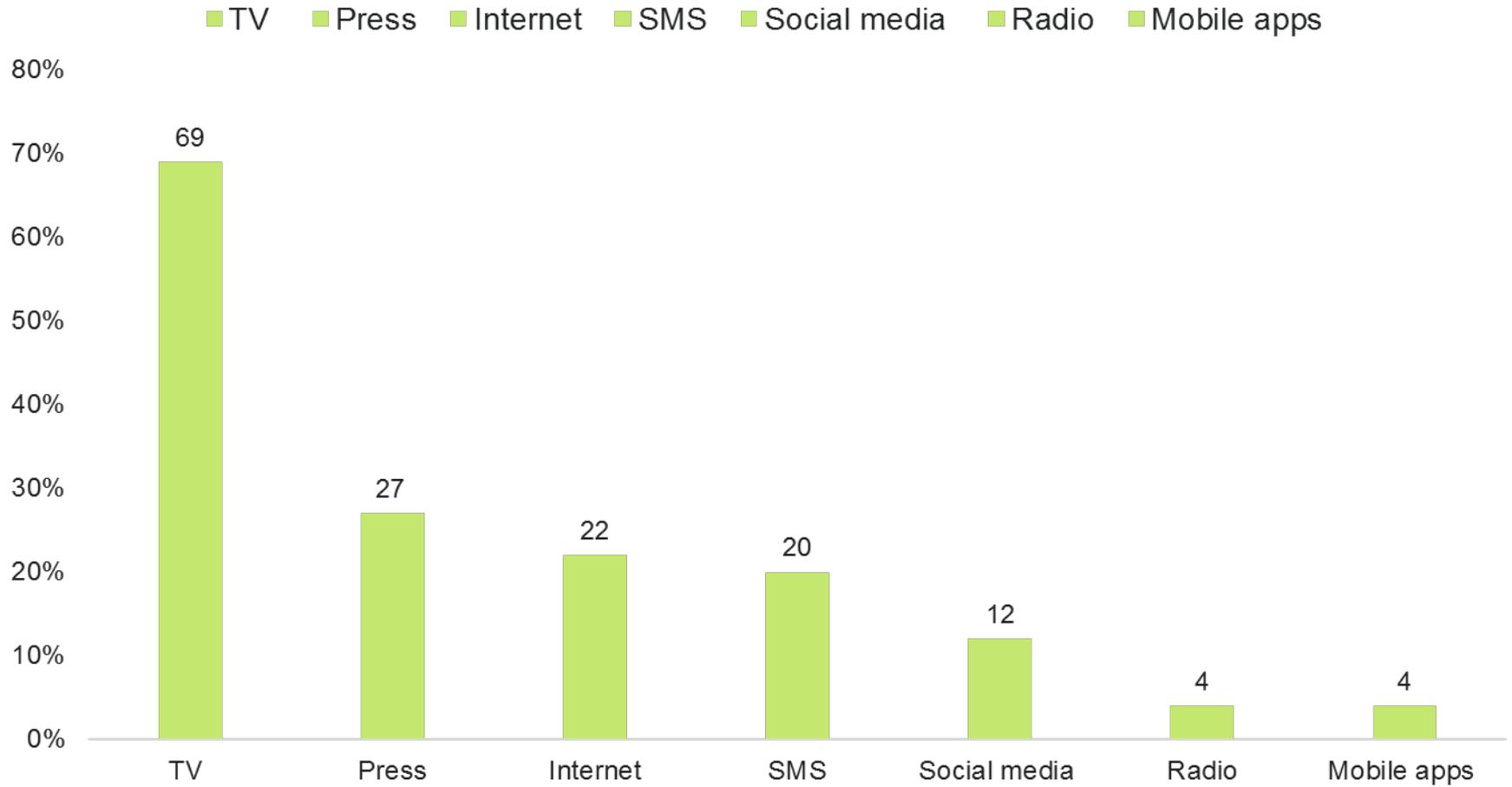
Daily Use of Media Platforms for News

People get news from many different sources. For each one of the sources I mention, please tell me whether you use that source to get news daily or most days per week, at least once a week, at least once a month, less than once a month, or never.

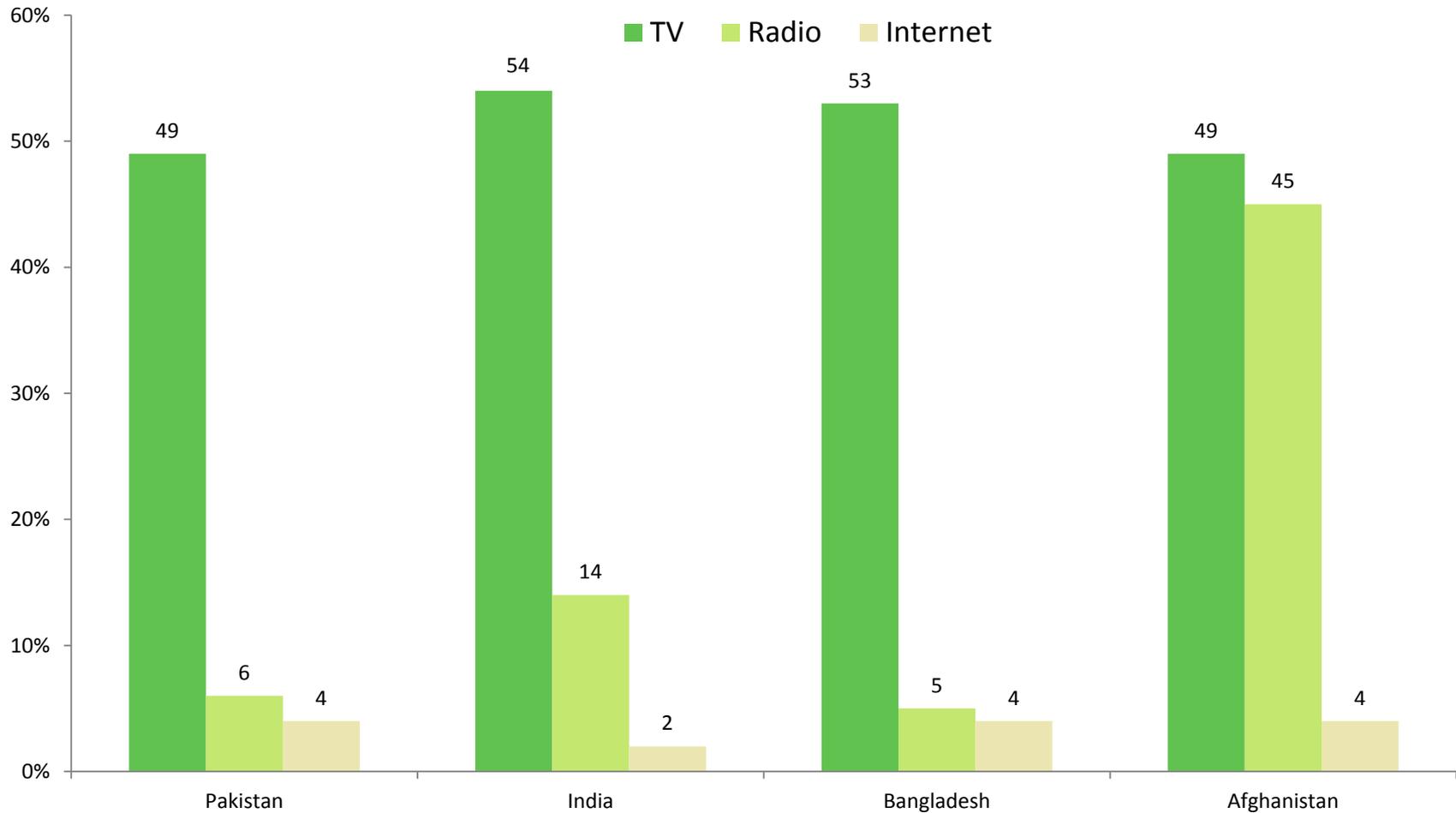


Base: All respondents

Daily Use of Media Platforms for News: Educated Urbanites



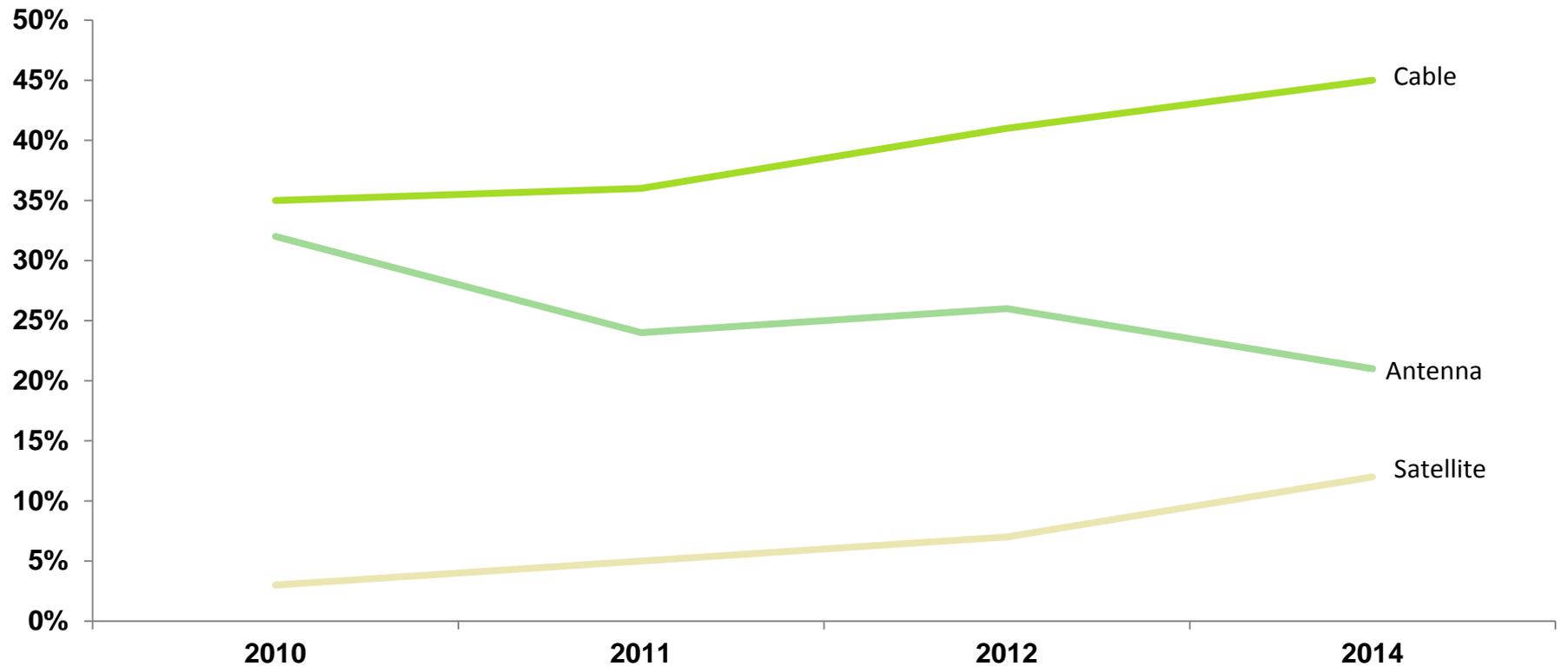
Comparative Media Use in South Asia



Base: All respondents. Pakistan, Bangladesh, and Afghanistan data from BBG/Gallup surveys; India data from Gallup World Poll

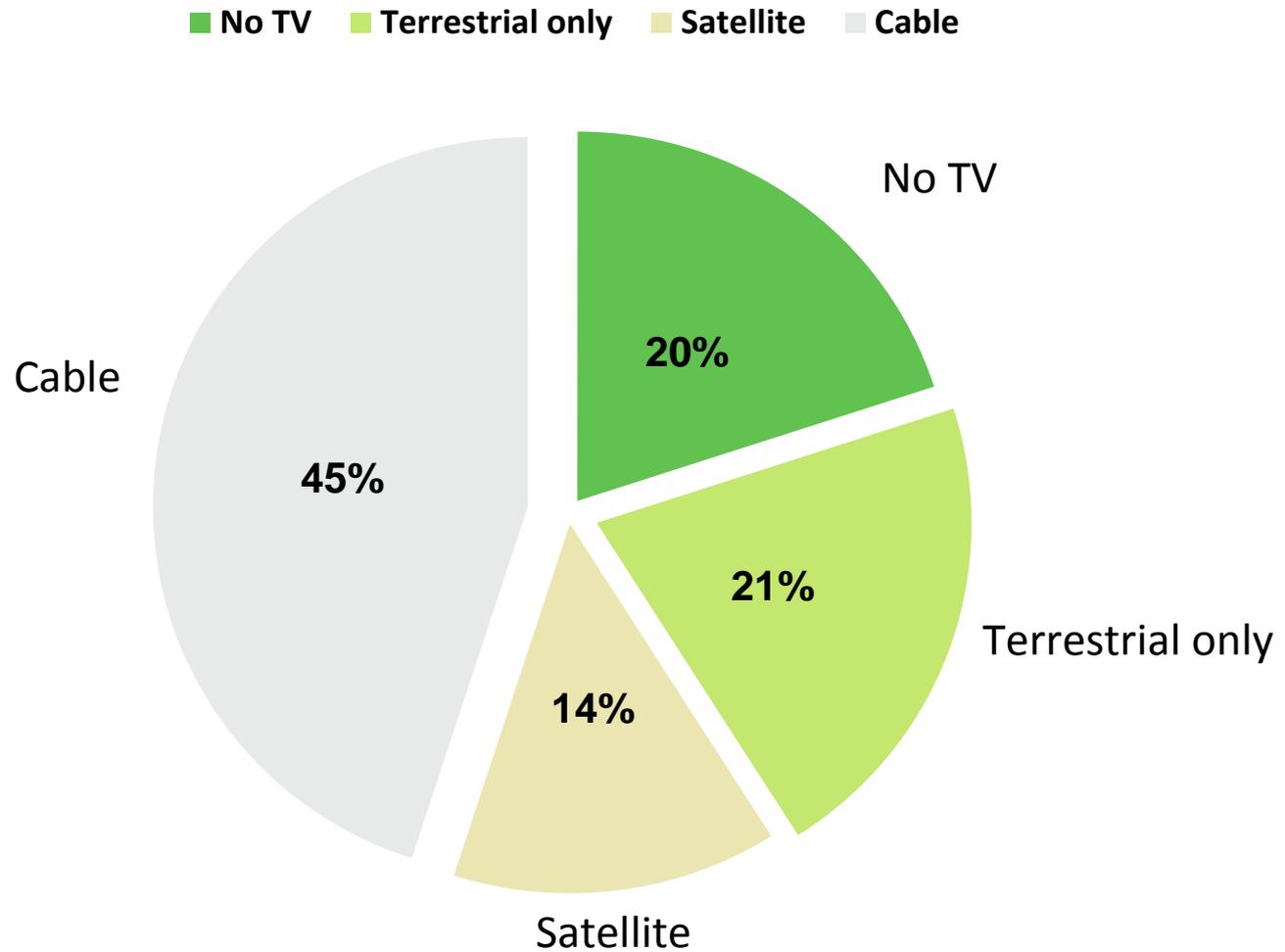
TV Reception Modes: 2010-2014

How does your television receive its signal? Does it receive it with the help of ...



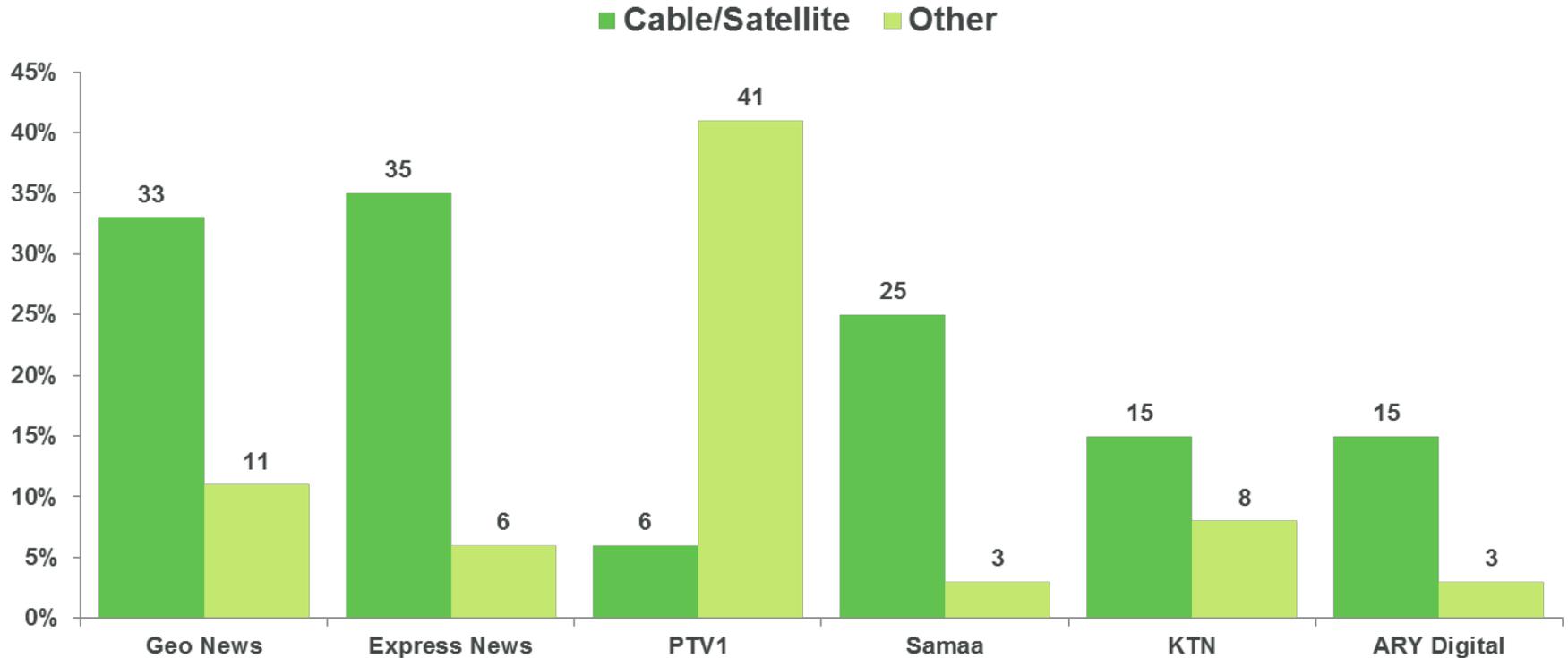
Base: All respondents

TV Penetration, by Means of Distribution



Top News Sources, by Means of TV Access

Please think about all of the television stations, radio stations, newspapers, magazines, or Internet sites you use to get news about current events. Which stations, publications, or sites are your three MOST important sources of information?

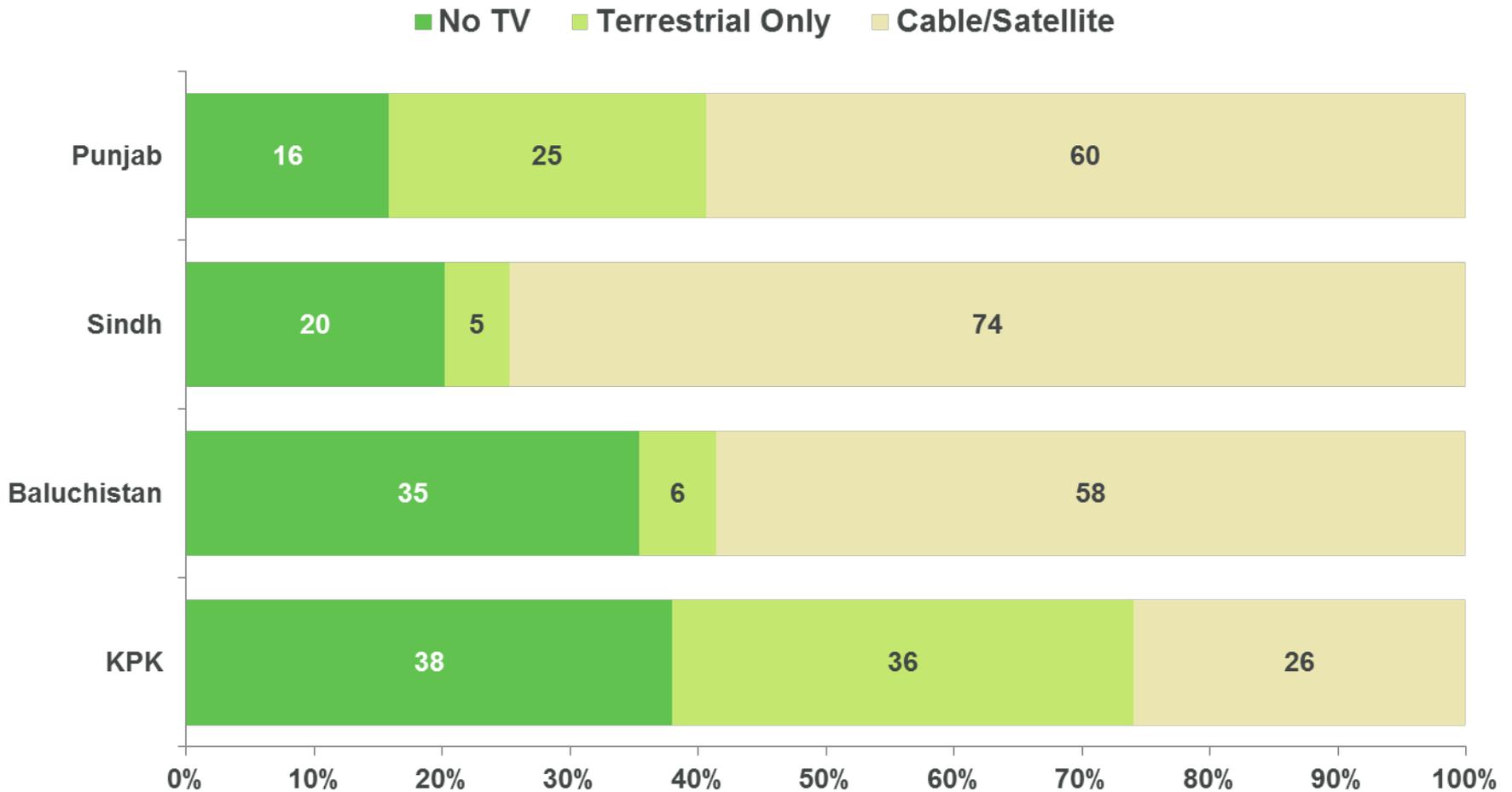


Base: All respondents. Percentages naming each station as one of top 3 info sources

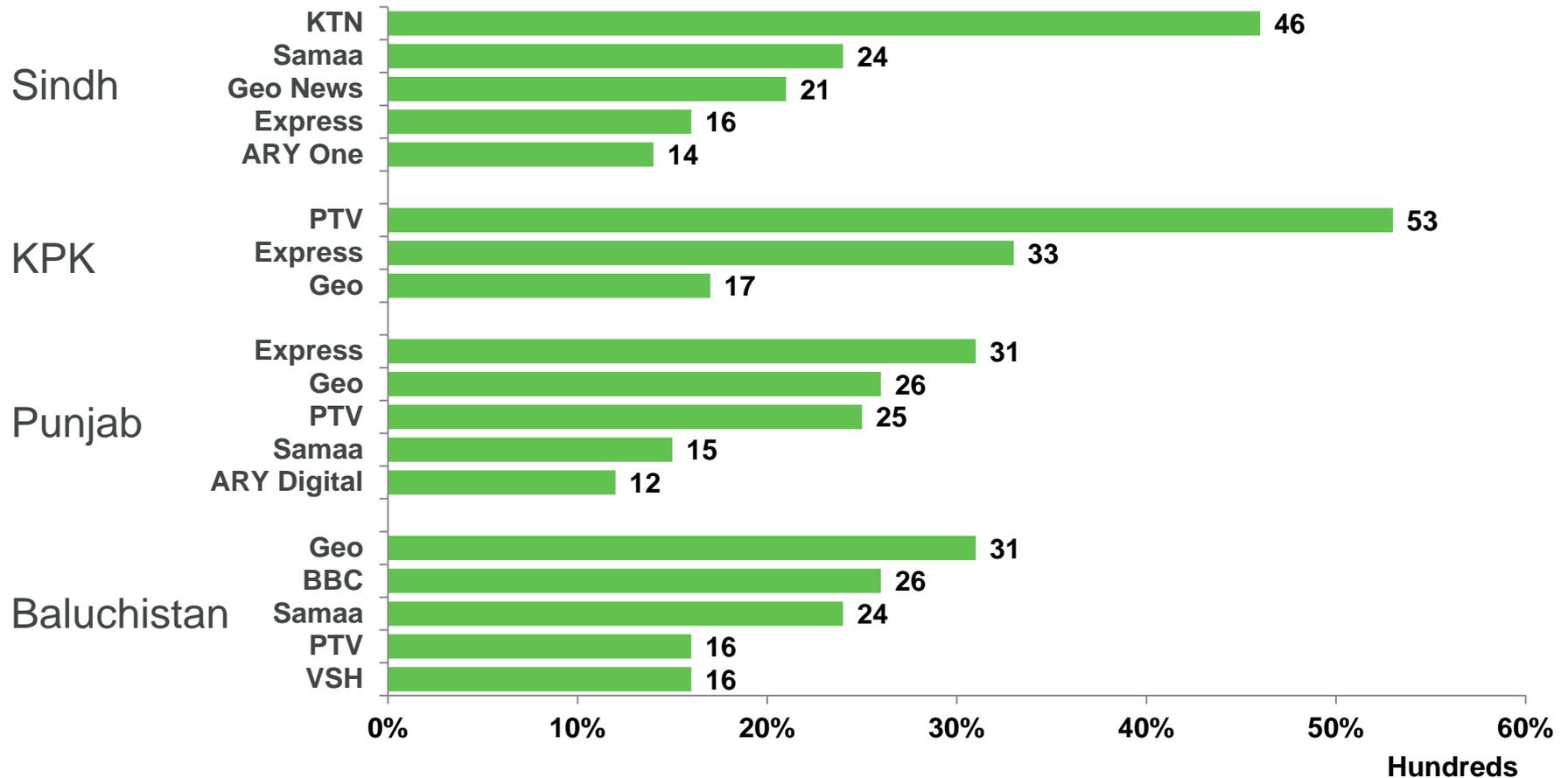


Regional Variations in Media Behavior

Modes of TV Access, by Region



Most Important News Sources by Region





Media Satisfaction

Media Satisfaction

How satisfied are you with the information provided by the media?



18%

Very
Satisfied



64%

Somewhat
Satisfied



15%

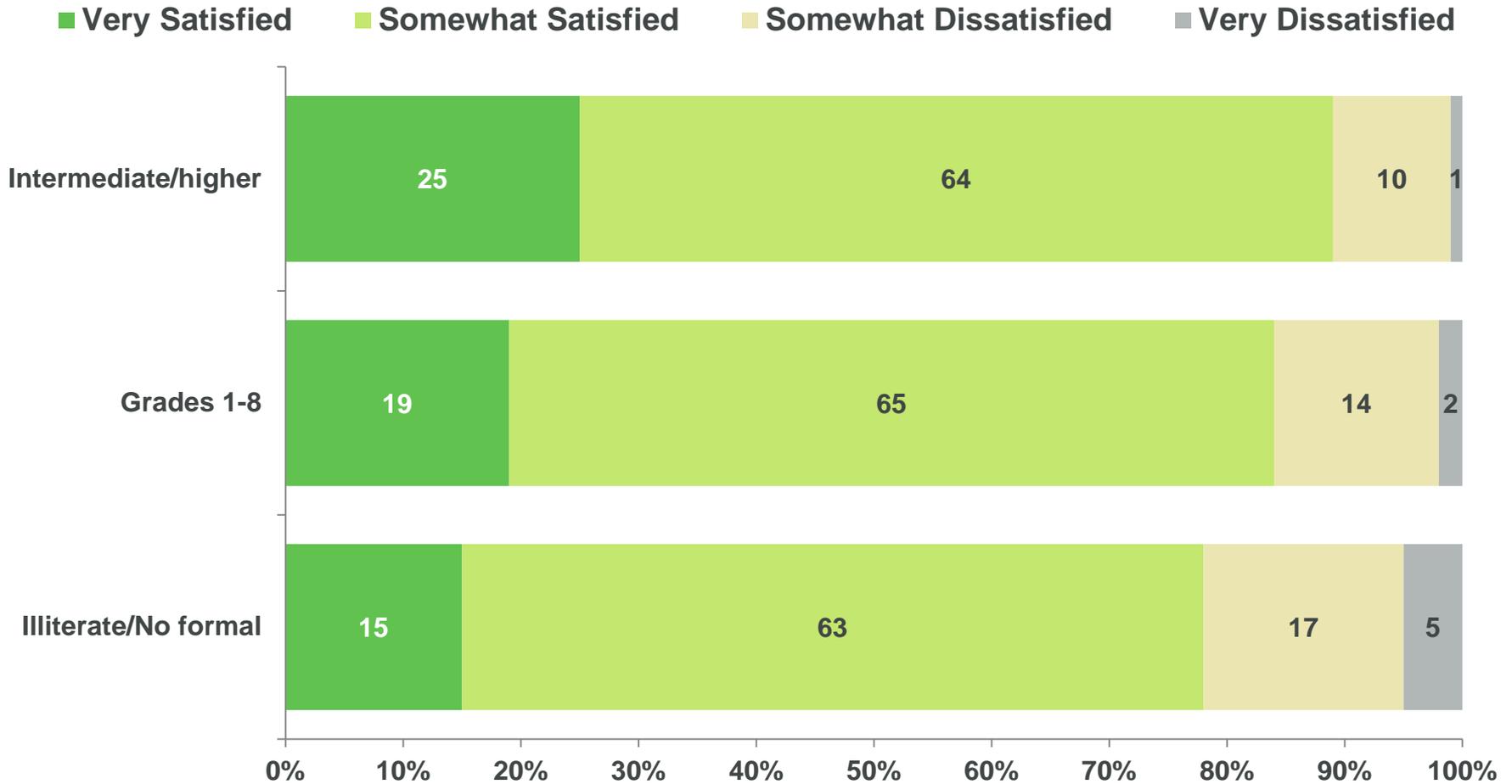
Somewhat
Dissatisfied



3%

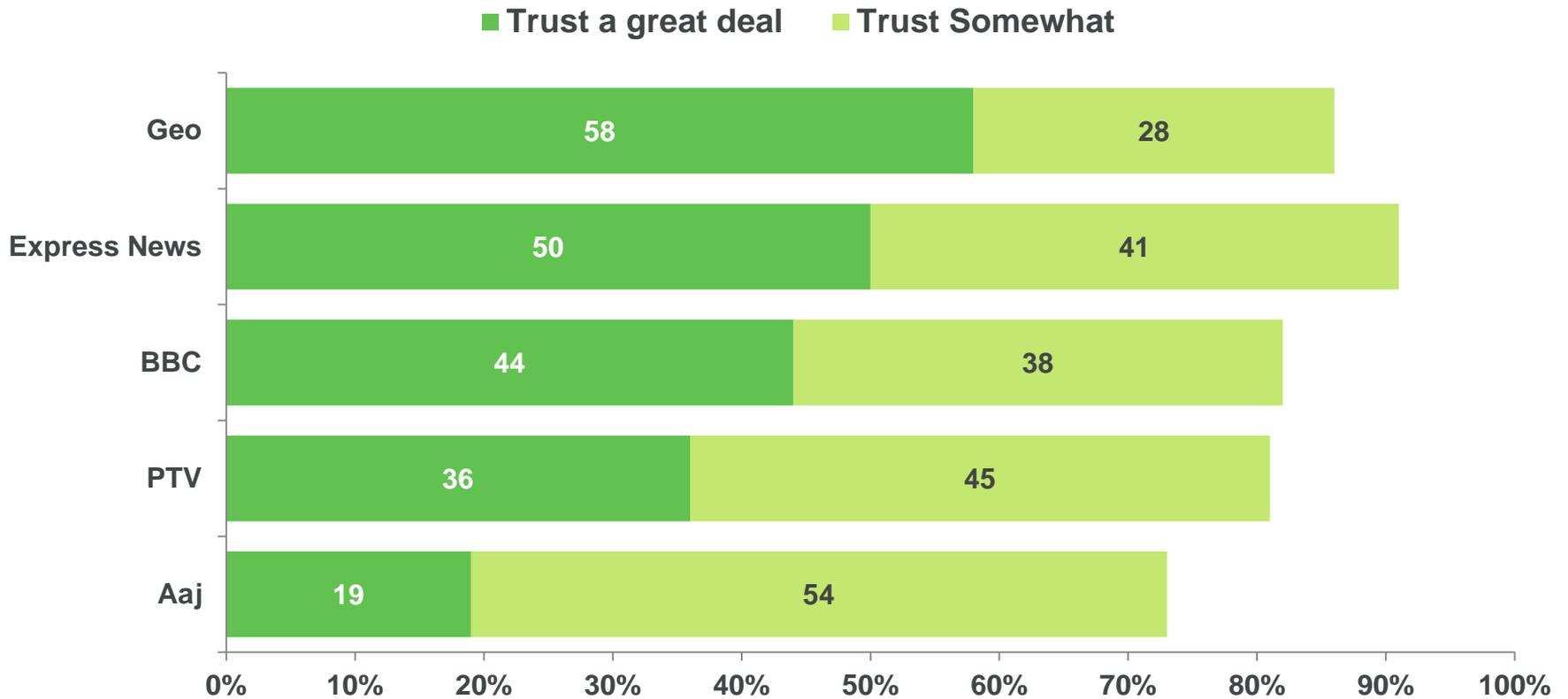
Very
Dissatisfied

Least Educated, Least Satisfied?



Trust in Main Channels

How much do you trust the news and information from each of the following sources? Please tell me if you trust each one a great deal, trust it somewhat, do not trust it very much, or do not trust it at all. If you are not familiar with the source, please tell me.



Base: Weekly viewers to each station

Penetration of Foreign Media



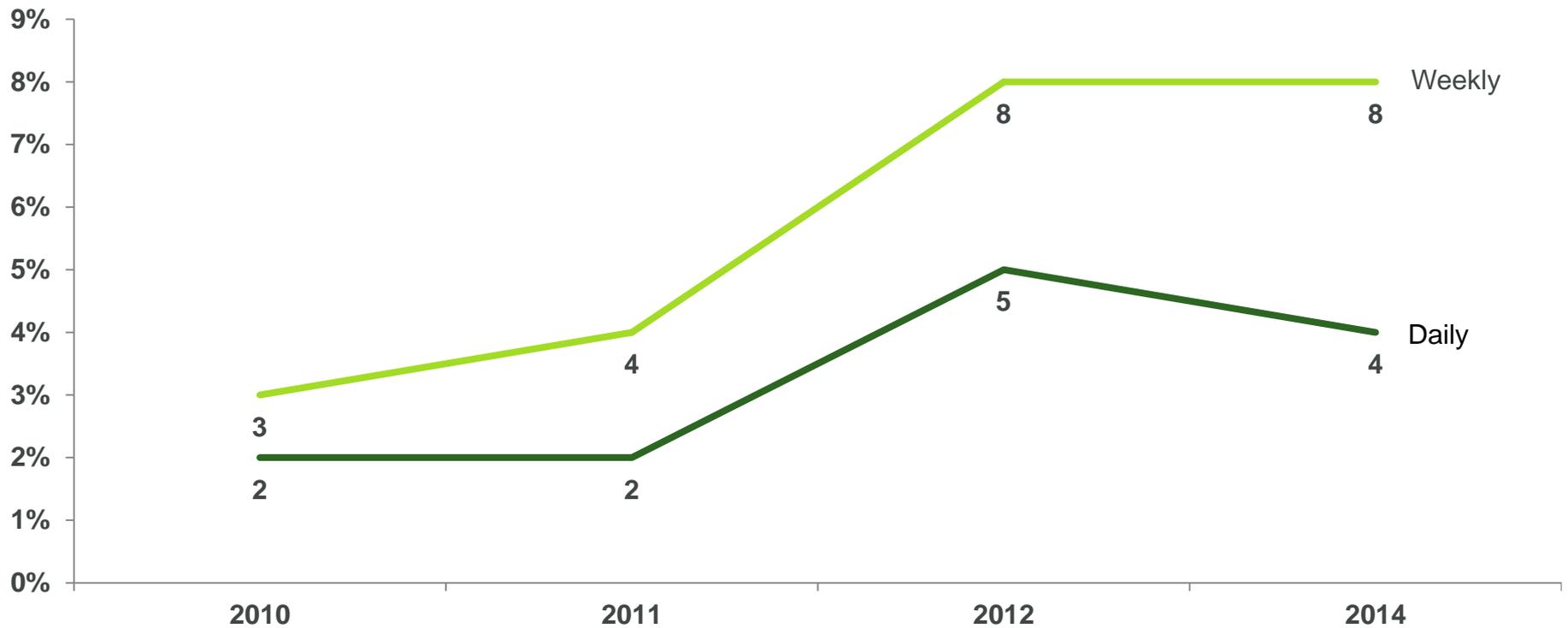
Percentage of respondents using foreign media (VOA, BBC, CNN combined)



Internet, Mobile, and News Sharing

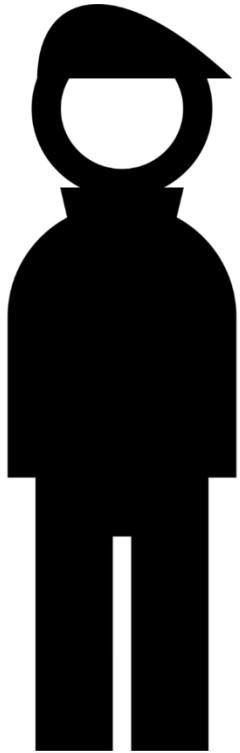
Internet Use: 2010-2014

Apart from today, when was the last time that you used the Internet, either for work or for personal purposes, whether it was at home or elsewhere? Internet could have been accessed using a computer, tablet, or a mobile device.



Base: All Respondents

Internet Users: Young, Male, Urban, Educated



Young: 14% of 15-24 year-olds, 10% of 25-34 year-olds

Male: 14% male vs 2% female

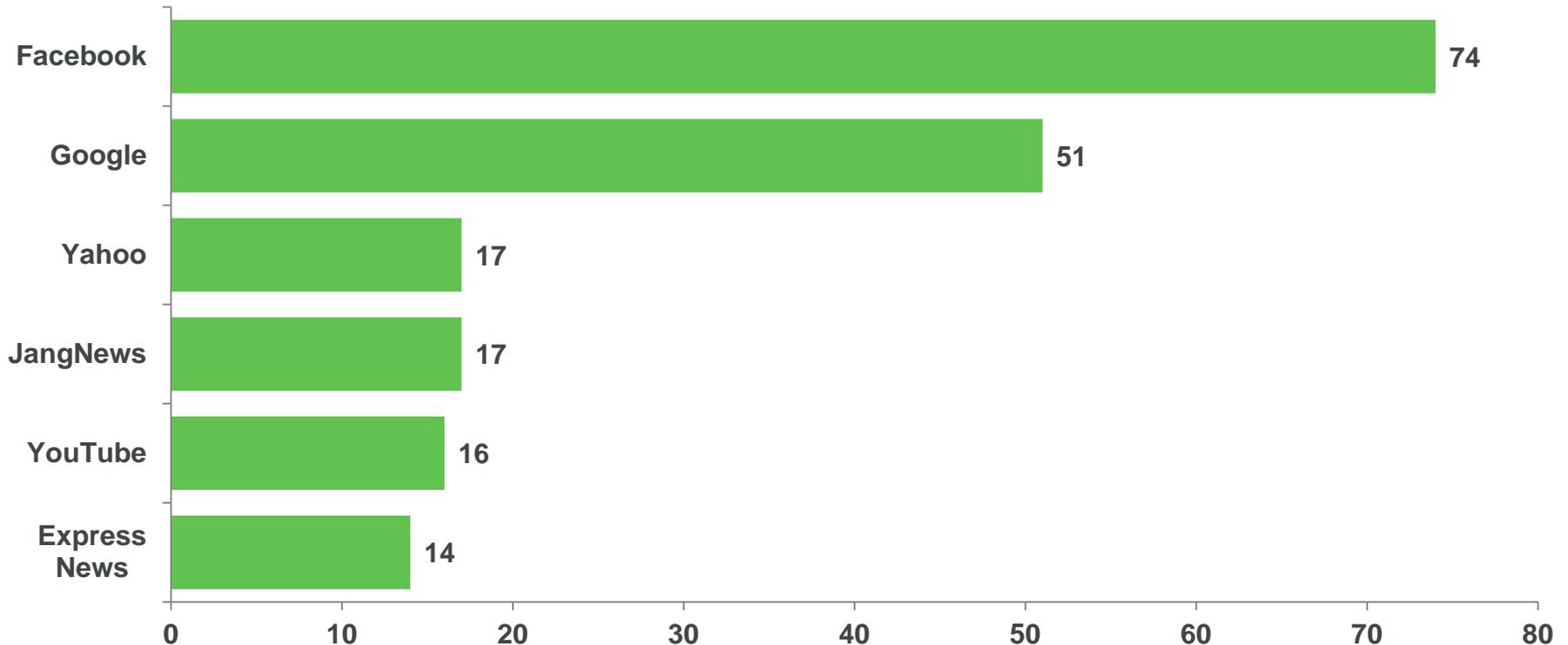
Urban: 13% urban vs 6% rural

Educated: 37% of those with intermediate/higher education

Percentage of each group using Internet for any purpose in past week

Top Three Internet Sources for News

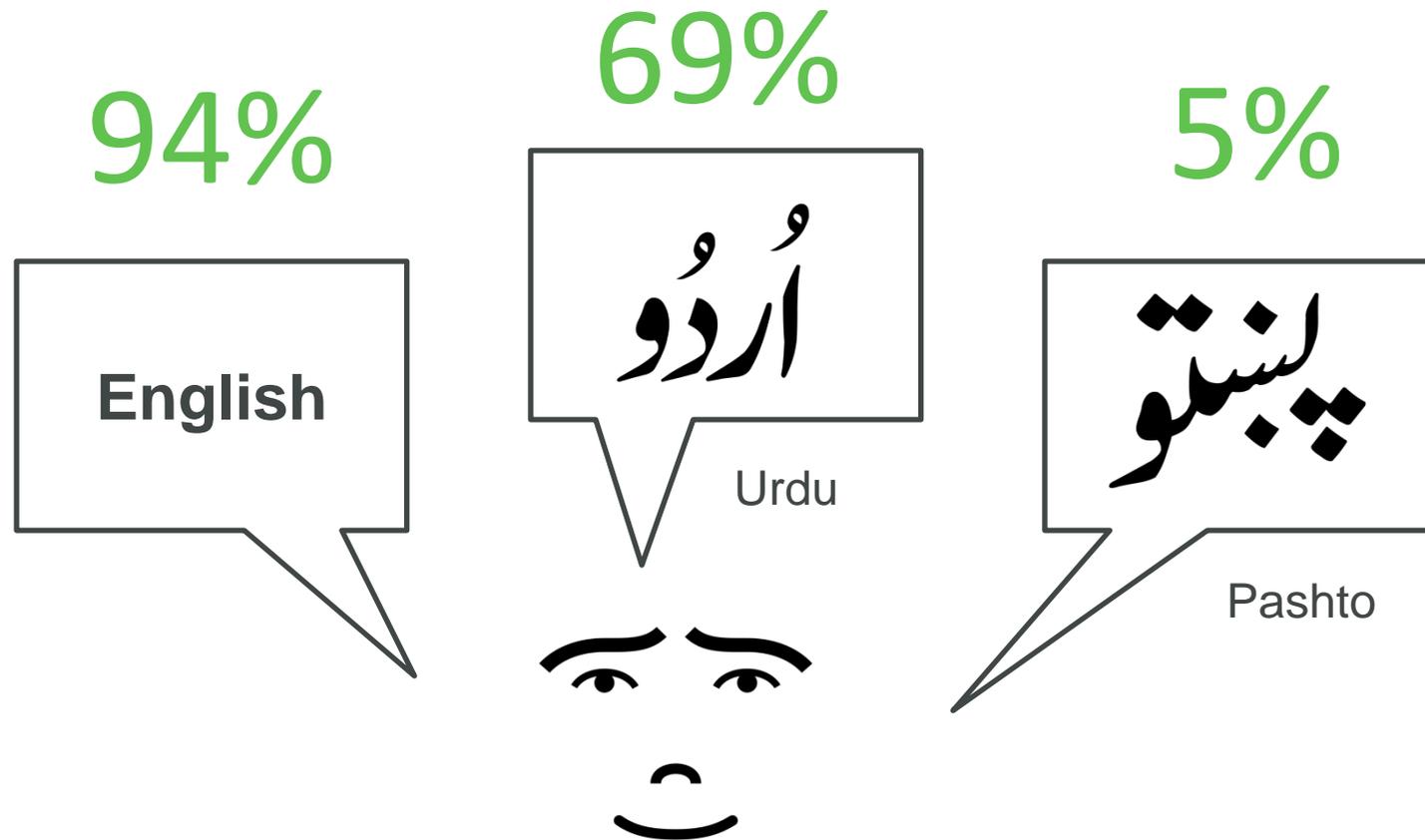
Please think about all of the television stations, radio stations, newspapers, magazines, or Internet sites you use to get news about current events. Which stations, publications, or sites are your three MOST important sources of information?



Base: Past week Internet users (n=252). Percentage citing each property as one of top three news sources.

Languages of Internet Access

Do you access the Internet in any of the following languages?



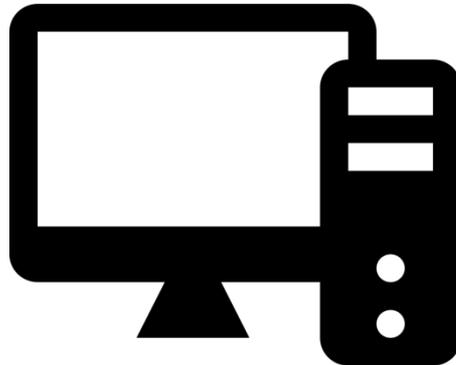
Base: Past week Internet users (n=252).

How do Pakistanis Go Online?

In the last 7 days, which of the following devices have you used to access the Internet ?



72%



56%

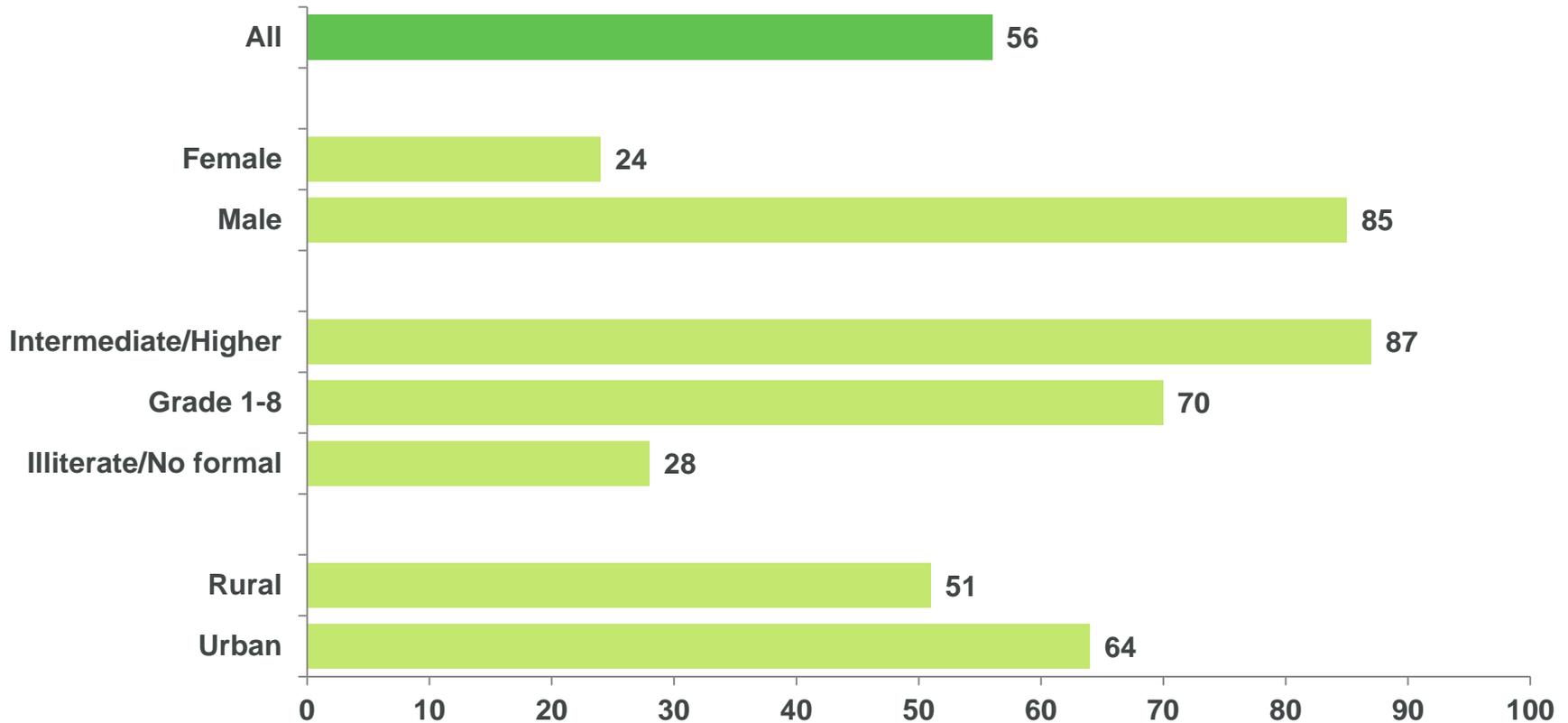


26%

Percentage using each method in past week. Base: Past week Internet users (n=252)

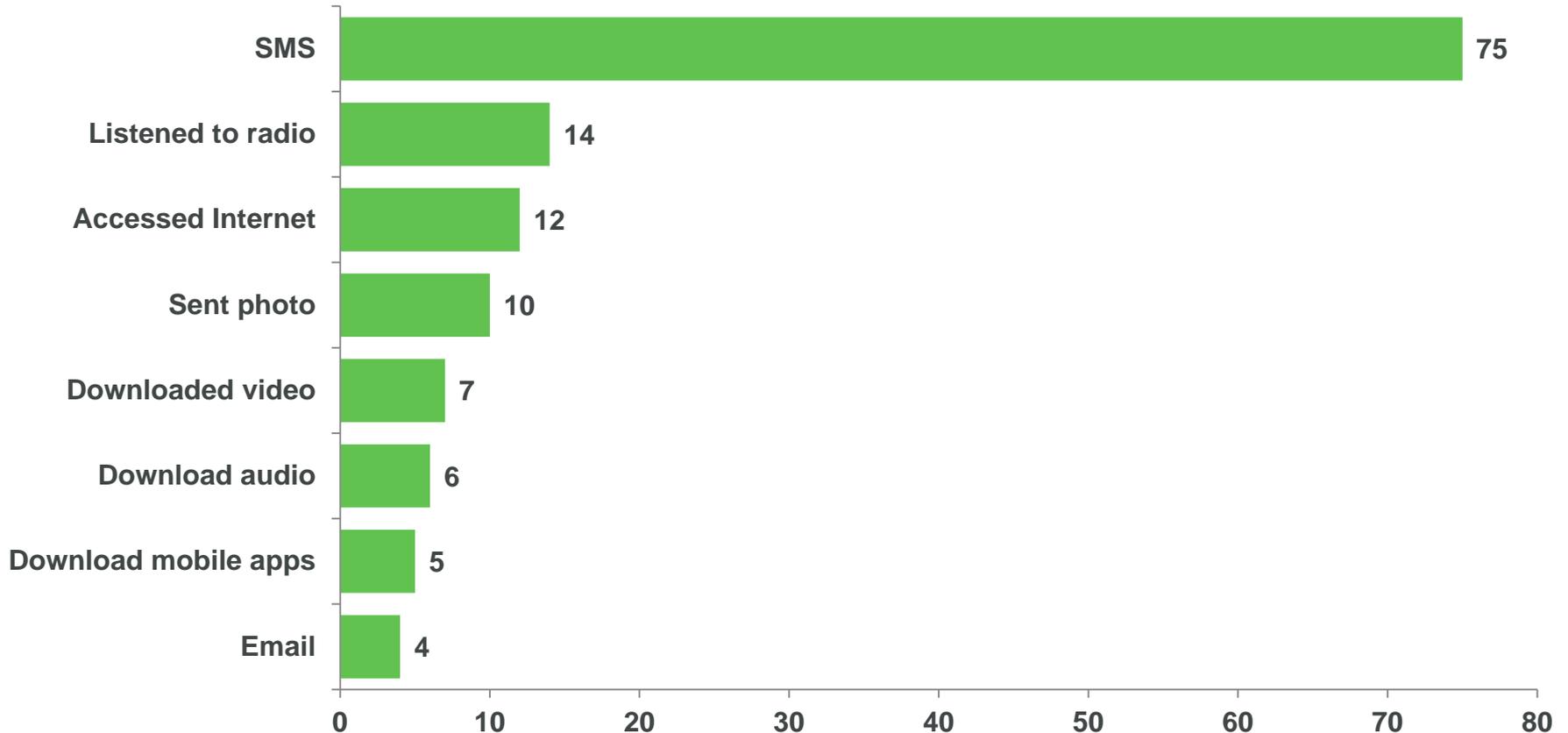
Personal Ownership of Mobile Phones

Do you, yourself, have a mobile phone, or not?



Actions Performed on Mobile Phone in Past 7 Days

Which, if any, of the following have you done on a mobile phone in the past 7 days?

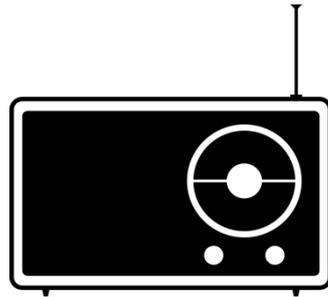


Base: Mobile owners (n=1710)

Means of Radio Listening



62%



49%

*Percentage using each method to listen to the radio in past week. Base: Past week radio users (n=495).
62% mobile phone; 49% conventional radio set; 5% car radio; 3% satellite radio; 2% cable TV; 2% Internet.*

Electronic News Sharing? (General population)

How often do you discuss or share news with family, other relatives, or friends?

Please tell me if you share news with your family, friends, or other relatives in any of the following ways.

Share News at
least weekly: 32%

Share via social
media: 3%

Electronic News Sharing: Young, Educated, Urbanites

Share News at
least weekly: 32%

Share news
via social
media: 10%

Conclusions

- TV is the main information platform by far, but the importance of individual channels varies by region and modes of access
- Population is divided between those with access to non-State TV and those without
- While most express generic satisfaction with media, actual opinions about specific channels vary
- At the national level, the impact of digital media remains modest, and electronic data sharing is still a niche phenomenon
- There is a huge gender disparity regarding access to Internet and mobile



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