In celebration of its 70th anniversary, the RIA Novosti media holding launches the International Future Media Forum, which focuses on the development of media technology, the impact of new and traditional media on society, and the future of journalism.

Charmy Sabigan Bombo Radyo Philippines, Area manager

Modern business models for media
Social revolution and new media
Media: future technologies

Special session:
Russian and Foreign Media: Past, Present, Future
An Overview of the Philippine Media

By

Charmy G. Sabigan
Bombo Radyo Philippines
The different mass media:

• Print
  – Newspapers
  – Magazines
• Broadcast
  – Radio
  – Television
• On Line
Newspapers

About 65 Newspapers in the country of national and local circulation

24 National

The Rest Regional/local

Circulation: About 4.7 M
Newspapers

• Written in English those of national circulation.

• Local Newspapers are written either in English, Filipino, the national language or in the local languages.
Broadsheets have their own websites updated regularly
Magazines

Only 12 are considered on the top
All in English
There are others which are regional and use
the national language or local dialect
Magazines cater to certain groups or interests
FHM – leading magazine for men, sexy but not vulgar
Seventeen – leading teenage magazine
The Entrepreneur-Handbook for Small-to-Medium size business owners
Cosmopolitan - Deals with romance, beauty, showbiz and many others
Yes Magazine - The leading entertainment magazine
Television

• There are less than 300 TV stations
• Only three (3) are dominant
  – Associated Broadcasting Company or ABC 5
  – ABS-CBN Broadcasting Corp. or TV 2
  – GMA Network or TV 7
Radio

• There are more than a thousand radio stations in the AM and FM bands
Radio

• Only three (3) Dominant Networks
  – Bombo Radyo Philippines
  – Manila Broadcasting Corporation
  – Radio Mindanao Network
The next table is a summary of the number of licensed broadcast media in the Philippines released by the National Telecommunications Commission or (NTC)
<table>
<thead>
<tr>
<th>REGION</th>
<th>AM</th>
<th>FM</th>
<th>TV</th>
<th>TV RELAY</th>
<th>TV X' LATOR</th>
<th>DTU / DBS</th>
<th>CATV</th>
<th>MMDS</th>
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<td>19</td>
<td>38</td>
<td>16</td>
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<td>1</td>
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<td>V</td>
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<td>6</td>
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<td>0</td>
<td>3</td>
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<td>32</td>
<td>0</td>
<td>115</td>
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<td>1</td>
<td>0</td>
<td>42</td>
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<td>5</td>
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<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>22</td>
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<tr>
<td>CARAGA</td>
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<td>15</td>
<td>1</td>
<td>5</td>
<td>0</td>
<td>34</td>
<td>0</td>
<td>107</td>
</tr>
<tr>
<td>TOTAL</td>
<td>383</td>
<td>659</td>
<td>297</td>
<td>30</td>
<td>56</td>
<td>3</td>
<td>873</td>
<td>1</td>
<td>2302</td>
</tr>
</tbody>
</table>

**TOTAL =** 2302
Government Controlled Networks

• Three (3) Television Stations
  – National Broadcasting Network, Inc. (NBN-TV4)
  – Radio Philippine Network (RPN TV 9)
  – Intercontinental Broadcasting Corporation (IBC-13)
Government Controlled Networks

- One (1) Radio Network –
  - Radyo ng Bayan but has regional stations
Government TV and Radio are least patronized by the people.
Government TV and Radio stations did not rate in scientific surveys conducted by Nielsen.
Information Agencies

• There are government information agencies in every region of the country but are not the principal sources of information of the people
Information Agencies

• Majority of the citizens are not aware that they exist
The Mass Media Consumers of the Philippines
Socio-economic Class

The number hasn’t changed much since 2001. 84% of the entire Philippine population is still made up of the lower classes.

2001:
- ABC: 5,622
- DE: 29,629
- Total: 35,251
- Lower Class: 84%

2010:
- ABC: 5,905
- DE: 30,835
- Total: 36,740
- Lower Class: 84%

ABC and DE categories are represented in the diagram.
Age Group

Almost 50% of the population is composed of the younger individuals, aged 10-29.

<table>
<thead>
<tr>
<th>Year</th>
<th>10-19</th>
<th>20-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50+</th>
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</thead>
<tbody>
<tr>
<td>2001</td>
<td>9,752</td>
<td>8,238</td>
<td>6,578</td>
<td>4,715</td>
<td>5,969</td>
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<tr>
<td>2010</td>
<td>9,692</td>
<td>8,168</td>
<td>6,945</td>
<td>5,242</td>
<td>6,694</td>
</tr>
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</table>

51% in 2001
48% in 2010
Educational Attainment

50% of the population only managed to attain secondary education, less people are actually graduating with college degrees.
Occupation

The declining number of individuals with college degrees might have been a huge factor as to why unemployment has increased drastically over the years.

2001
- 8 Business/Proprietors
- 3 Professionals/Managers
- 4 Housewives
- 25 White Collar
- 18 Blue Collar
- 27 Not Gainfully Employed
- 14 Students

2010
- 365 Business/Proprietors
- 807 Professionals/Managers
- 1,294 Housewives
- 10,661 White Collar
- 5,333 Blue Collar
- 6,945 Not Gainfully Employed
- 10,614 Students

Colors:
- Yellow: Business/Proprietors
- Green: Professionals/Managers
- Light Blue: White Collar
- Pink: Housewives
- Blue: Blue Collar
- Light Green: Not Gainfully Employed
- Cyan: Students
TV is still King
Media Reach

Despite the growth of new media, at least 90% of the whole population still have their TV sets on.

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV (Past Week)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Radio (Yesterday)</td>
<td>62</td>
<td>65</td>
<td></td>
</tr>
<tr>
<td>Outdoor (Past Week)</td>
<td>62</td>
<td>62</td>
<td>58</td>
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<tr>
<td>DVD/VCD (Past Month)</td>
<td>58</td>
<td>58</td>
<td>58</td>
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<tr>
<td>Cinema (Past 6 Months)</td>
<td>16</td>
<td>18</td>
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<tr>
<td>Newspaper (Yesterday)</td>
<td>15</td>
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<tr>
<td>Magazine (AIR)</td>
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<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Internet (Past Month)</td>
<td>28</td>
<td>30</td>
<td>30</td>
</tr>
</tbody>
</table>

Source: Nielsen Media Index 2008-2010
Typical TV Viewing Day

TV viewing registers a peak during Primetime, specifically from 8-10 pm.

% of Mega Manila 10+ Population Who Tune in to TV on an Average Quarter-Hour (Tarps %)

Source: Nielsen Audience Measurement June 2010

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National Urban: TV Ownership

- TV ownership at 94%, up by 4% vs. 2008. Luzon remains the driver of NUTAM TV ownership at 95%
- Luzon is also the area with most multi-set TV homes at 25% (driven by Urban Luzon: 30%)
- Visayas, having the largest E segment, has the lowest TV ownership among areas at 86% but grew vs. 2008 by 2%
- Mindanao’s TV ownership at 91% - grew by 4% vs. 2008
Radio on the Go!
Media Reach

Source: Nielsen Media Index 2008-2010
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Radio Shape of the Day
Mega Manila 2010

Source: RAM Mega Manila S8 2010
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Time Spent Listening

- Total: 11
- AM: 9
- FM: 11

Source: RAM Mega Manila S8 2010
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Profile of Radio Listeners

Q2 2010
Mega Manila

Gender

Female
Male

All People 50
Radio Listener 50

Age

50+ 18
40-49 17
30-39 19
20-29 22
10-19 22

Eco

Class

All People 26 14
Radio Listener 58 60

Pt & Eco

Class

C1,3 11
AB,2 18
C1,5 14
AB,3 58

Base: All People 10+
Source: National Media Index Q2 2010

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Print is Challenged
Reasons For Not Reading Broadsheet P12 Mos.

Why have you not read any broadsheets in the past 12 months? n=2447

- Prefers TV: 19 (2010 Q2), 21 (2010 Q1)
- Do not Like To Read Newspaper: 5, 5
- Not My Priority: 4, 4
- No Time To Read: 6, 6
- Price Is An Issue: 3, 4
- Prefers Radio: 2, 2
- None In My Family Reads: 1, 1
- No Available Newspaper In The Area: 3, 2
- Prefers Internet: 1, 0

- Availability of other media
- Needs to develop the habit of reading
- Affected during times of crisis

Base: All People 10+ , Non-broadsheet readers in the past 12 months
Source: Nielsen Media Index 2010 Q2

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Most Read Broadsheets

PHILIPPINE DAILY INQUIRER
BALANCED NEWS, FEARLESS VIEWS

MANILA BULLETIN
THE NATION'S LEADING NEWSPAPER

THE PHILIPPINE STAR
TRUTH SHALL PREVAIL
Profile of Broadsheets Readers

Read Yesterday

Gender

- All People: 50 Female, 60 Male
- B. Readers: 40 Female, 50 Male

Age

- All People: 18 Under 18, 14 18-24, 13 25-34, 23 35-44, 27 45-54, 21 55-64, 15 65+
- B. Readers: 24 Under 18, 11 18-24, 30 25-34, 30 35-44, 21 45-54, 15 55+

Eco Class

- All People: 26 E, 58 D, 23 C2, 12 C1, 11 AB, 7 C1, 11 AB, 7 C1, 11 AB
- B. Readers: 10 E, 49 D, 23 C2, 12 C1, 11 AB, 7 C1, 11 AB

Base: All People 10+
Source: National Media Index Q2 2010

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Top Monthly Magazines Read

- ELLE
- YES!
- COSMOGLAM
Magazine Readership (AIR)

- Mega Manila: 9, 12, 14
- Metro Manila: 13, 16, 18
- Cebu: 3, 5, 5
- Davao: 6, 7, 7

Base: All People 10+
Source: Media Index 2008-2010
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Profile of Magazine Readers
Past Year

Gender

<table>
<thead>
<tr>
<th></th>
<th>All People</th>
<th>M. Readers</th>
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<tbody>
<tr>
<td>Female</td>
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<tr>
<td>Male</td>
<td>50</td>
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Age

<table>
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<th></th>
<th>All People</th>
<th>M. Readers</th>
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<tr>
<td>10-19</td>
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<td>30-39</td>
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<td>50+</td>
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Eco Class

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</tr>
<tr>
<td>D</td>
<td>58</td>
<td>57</td>
</tr>
<tr>
<td>C1,4</td>
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<td>7</td>
</tr>
<tr>
<td>AB,4</td>
<td>10</td>
<td>10</td>
</tr>
</tbody>
</table>

Base: All People 10+
Source: National Media Index Q2 2010

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Online on The Rise!
Media Reach

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
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</thead>
<tbody>
<tr>
<td>TV (Past Week)</td>
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<td>92</td>
<td>91</td>
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<tr>
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<td>Outdoor (Past Week)</td>
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</tr>
<tr>
<td>Internet (Past Month)</td>
<td>28</td>
<td>30</td>
<td>30</td>
</tr>
</tbody>
</table>

Base: Males and Females aged 10+ across all socio-economic classes in National Urban Philippines

Source: Nielsen Media Index 2008-2010
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Internet Usage

The Philippines has one of the highest growth in terms of internet usage in the past 3 years in the Asia-Pacific region.
Internet User Profile

Countries with high internet penetration have a good share of users in all age groups. Internet usage continues to grow in the Philippines and the rest of the regions with mostly young users.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Philippines</th>
<th>Thailand</th>
<th>Indonesia</th>
<th>Malaysia</th>
<th>Taiwan</th>
<th>Singapore</th>
<th>Hong Kong</th>
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<td>20-29</td>
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<td>23</td>
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<tr>
<td>10-19 years</td>
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<td>26</td>
<td>48</td>
<td>23</td>
<td>23</td>
<td>28</td>
<td>23</td>
</tr>
</tbody>
</table>

nielsen
Base: Past Week Internet Users
Source: Nielsen Media Index 2009

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Level of Censorship
How does the state influence the mass media?
Philippine Media are remarked the freest in Asia
The Philippines adopts

The United States of America’s
First Amendment
The Philippine Constitution provides

In Article 3,
Bill of Rights Sec 4
Section 4.

No law shall be passed abridging the freedom of speech, of expression, or of the press, or the right of the people peaceably to assemble and petition the government for redress of grievances.
Thank You