

The Philippine Communication Media Landscape

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Key Indicators

Population ¹ (2010) Projected Population (2020) ¹	92, 335, 113M 111,784.6M	Basic Literacy (2013) ages 10 and above) ⁵	Male: 96.1% Female: 97.0%
		Functional Literacy (2013, ages 10-64) ⁵	Male: 88.7% Female: 92.0%
Urban population ¹ (2010)	Urban: 45.30% Rural : 54.70%	Functional Literacy (2013, breakdown) ⁵	Age ranges 10-14: (54.8%) 15-19: (76.6%) 20-24: (86.9%) 25-29: (84.8%) 30-39: (79.2%) 40-49: (74.3%) 50-59: (70.2%) 60-64: (62.9%)
Population growth rate (2015-2020) ¹	1.59%	Television penetration (2013, Ages 10-64) ⁵	81%

Sources:

1Philippine Statistics Authority (PSA), 2015a

2 Nielsen, 2015

3National Book Development Readership Survey, 2012

4 Press Freedom Index

5 PSA, 2015b

Key Indicators

Infant mortality rate (2012)¹	12.4% per 1,000 live births	Internet penetration (2015)²	41%
Life expectancy at birth (2015- 2020)¹	Women: 74.34 years Men: 68.81 years	Mobile Phone penetration per 100 population (2013)¹	103.00%
GNI per capita (2009) 1	US\$1790	No. media outlets ¹ *Includes AM & FM radio stations, TV, cable TV, cinema, newspaper and magazines	3,996
GDP per capita annual growth rate 2009-2010 1	7.3%	Press Freedom Index (2015)⁴	141 of 180
Languages	The official languages of the Philippines are Filipino (based on Tagalog) and English, along with hundreds of Philippine languages.	Readership (2012)³ Reading materials read:	88% Bible: 58% Romance: 25% Cookbook : 21% Comic books: 12%

Sources:

1Philippine Statistics Authority (PSA), 2015a

2 Nielsen, 2015

3National Book Development Readership Survey, 2012

4 Press Freedom Index

5 PSA, 2015b

Summary

- Philippine mass media operate on a commercial, free-enterprise system. It is dependent on advertising revenue and entertainment-oriented programs.
- The media are generally free from government control, but can face pressure from business and political interests
- Most media outlets are privately owned, with the exception of government- owned and controlled TV and radio networks
- TV (81%) and radio (65%) are the most popular media. TV is the main source of information.
- Mobile phones are popular and the use of SMS is widespread. The Philippines is the “text capital of the world” with a mobile phone penetration of 103%

Summary

- The Philippines is also one of the “heavy” social media users in the world with (as of 2015) more than 47M Filipinos as Facebook users
- School children can best be reached via television
- Broadsheets are popular among policy and decision makers
- The country continues to face the challenge of addressing the so-called culture of impunity in the killing of journalists, which has continued even after the restoration of democracy. The CMFR reported that 179 journalists have been killed since 1986, out of whom 121 were killed in the line of duty

Media Consumption Trends

Television is a highly pervasive medium in the country with 81% TV exposure.



Radio is also very pervasive, as it is inexpensive, and available even in remote communities. Filipinos within the 10-64 age range are exposed (65.6%) to the radio (PSA, 2015b). Radio reaches 85% of Filipinos as opposed to 60% reach of TV.



In Mega Manila, 12 percent read broadsheets and a bigger 25 percent read tabloids. There is also higher tabloid readership in National Urban areas, with broadsheet readership at 9.4 percent and readership for tabloids at 16.3 percent (2007 4As Media Factbook).



The Philippines is ranked 11th in the Asia-Pacific region in terms of penetration rate of the 15 countries covered by the survey with 41% penetration rate (Nielsen, 2015). Among Southeast Asian countries considered in the survey, the Philippines lagged behind Vietnam (44%), Malaysia (67%), and Singapore (80%).



Filipinos spent 5.2 hours on the internet using either desktop or laptop computers and 3.2 hours using mobile device

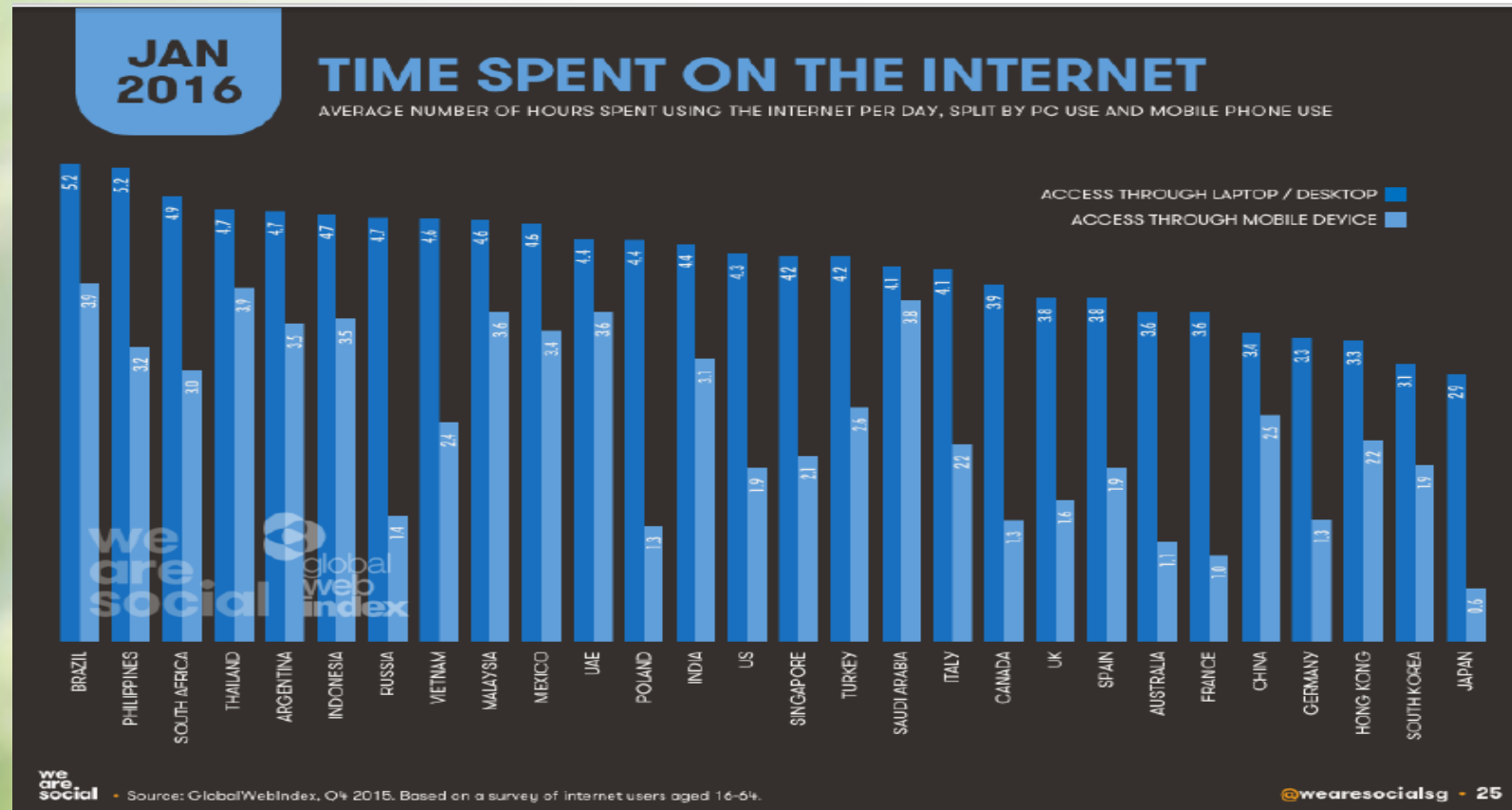


Figure 2. Time spent on the internet.

Filipinos topped the 30 economies survey with an average of 3.7 hours spent in social media. The survey involved people from 16-64 years old. Next to the Philippines are Brazil and Mexico. The Japanese spent the least number of hours in social media.



In 2014, SMART reported a 20% drop in the number of SMSs sent in the Philippines as many shifted to using social media messaging platforms, and the fact that people access the internet using their mobiles (GSMA, 2014).

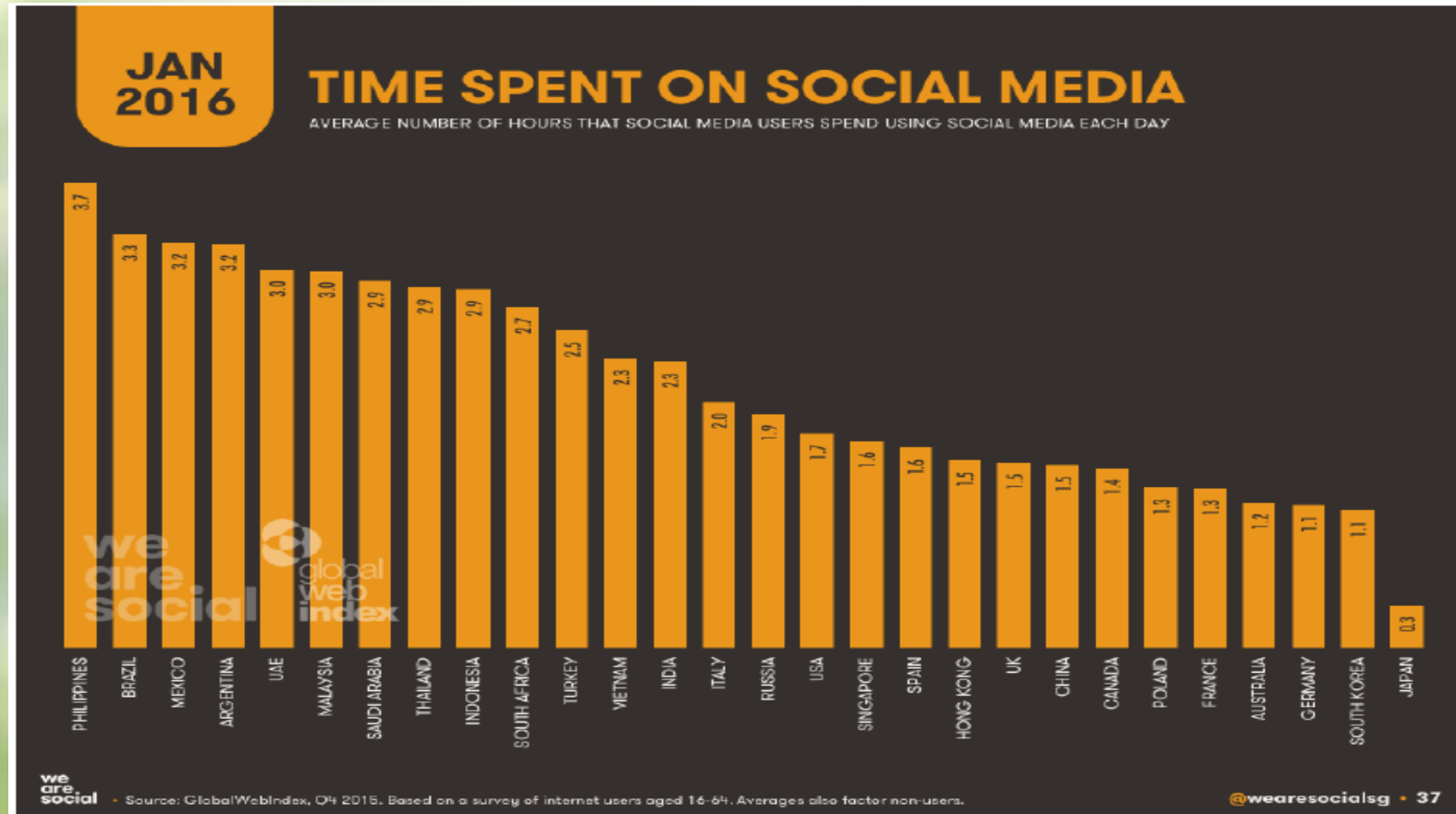


Figure 4. Time spent on social media.

The Philippines registered the highest smart phone growth in Southeast Asia by 75% in during the 2010 to 2013 period (GSMA, 2014). Southeast Asia's average was 50% (GSMA,

The country's cellular mobile telephone service (CMTS) density per 100 population was 103 in 2013 (PSA, 2015a). During the same year, there were 102,823,569 subscribers across the country with SMART Communications getting 53% of the total market share (PSA, 2015a). Other big players include Globe Telecom and Digitel.



There are also about a thousand community eCenters or CECs placed by the government's Commission on Information and Communications Technology (which has been turned into the Information Communication Technology Office under the Department of Science and Technology in 2011) in partnership with the Philippine Community eCenter Network. The CeCs aim to bridge the digital divide and give citizens universal access to information and communication services.



Communicating with the General Population

Television has the highest rate of daily exposure among the media for 10- to 64-year-olds in the Philippines at 81% (PSA, 2015b). Many Filipinos also perceive TV as a trusted source of information.

Radio can also make a significant contribution with a daily exposure rate of 26.3% (PSA, 2015b).



Strategy for urban areas

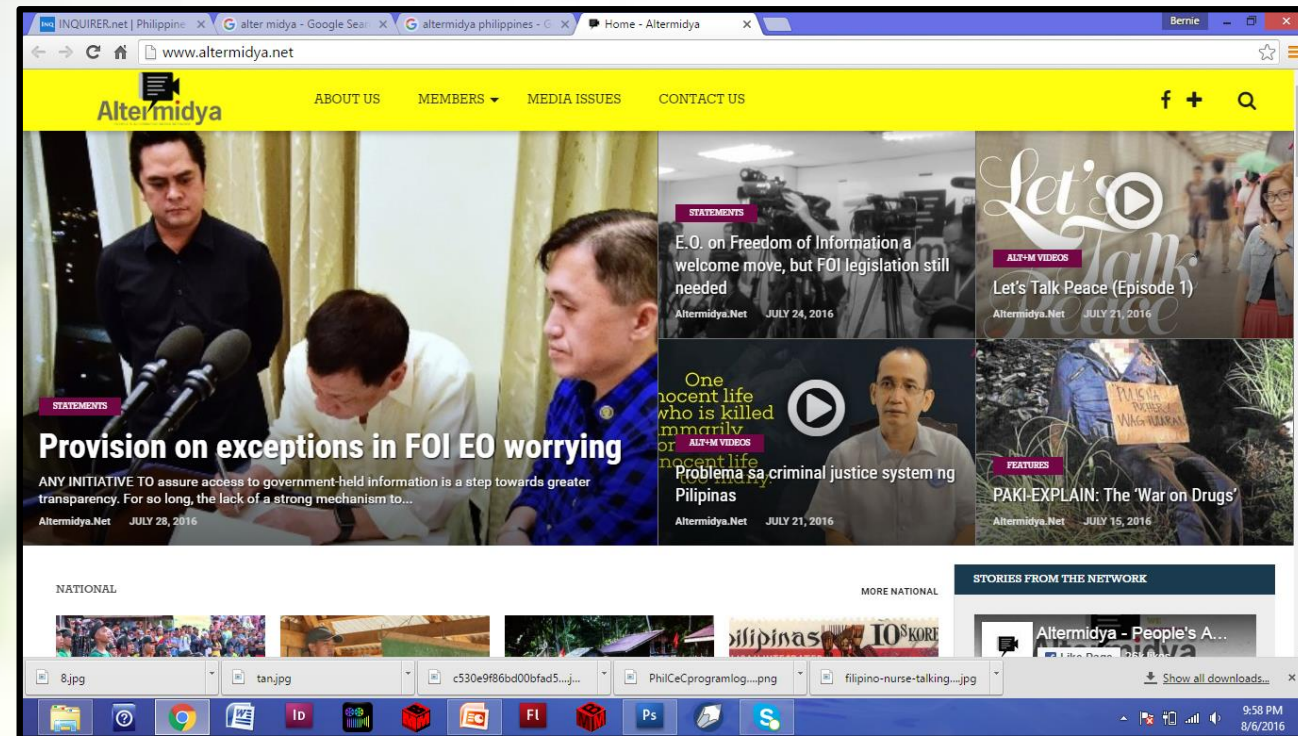
A mix of traditional and contemporary media, such as television and social media, may be used to reach urban areas, the youth, and higher income groups.

Online editions of local newspapers, the rise of news websites run by NGOs and alternative media organizations provide alternative sources of information via the Internet. These provide additional background information, independent research studies, and opinion articles (AIJC, 2011).



In 2014, *AlterMidya* (www.altermidya.net), “a network of independent and progressive media outfits, institutions and individuals” was born.

AlterMidya aims to strengthen the coordination of alternative media outfits, and hence, more effectively cover the voice of the marginalized sectors.



Strategy for rural areas

- Television ownership is widespread in the rural areas, as even those in non-electrified communities use car batteries as a source of power for their TV sets (AIJC, 2007). In addition, TV sets remain to be the most popular among newly electrified households (World Bank, 2002).
- Radio remains to be highly pervasive
- Film or video showing also continues to be popular in these communities. Developmental messages are often shown during screenings of local movies. As for IEC materials, streamers can be effective in communicating a variety of messages, including notices from the government or advertisements (AIJC, 2011).



- Community media can serve as alternative to the major mass media outlets, and can encourage more in-depth discussions on local issues and cater to each community's needs.
- Interpersonal and group communication, with the use of socio-cultural settings.
- Lobbying strategies for rural areas require systematic planning from the preparation of letters to local officials to the follow up of appointments or feedback.
- The local dialect is used more than Filipino (Tagalog).

