

Senate Standing Committee on Environment and Communications

Answers to Senate Estimates Questions on Notice

Additional Estimates February 2017

Communications Portfolio

Australian Broadcasting Corporation

Question No: 96

Australian Broadcasting Corporation

Hansard Ref: Page 87, 28/02/2017

Topic: Short-wave Technology - Research

Senator Griff, Stirling asked:

Senator GRIFF: So much has changed in the last few years. If you look at your departing international chief, Lynley Marshall, who reported just three years ago that older short-wave technology was still relevant in the Pacific in particular, saying:

You'd have to see a significant take-up in other devices to warrant moving away from shortwave. So you are saying it has dramatically changed in these countries?

Ms Guthrie: Yes, it has.

Senator GRIFF: Based on?

Ms Guthrie: Based on the work we have been doing in those countries. It is very clear to us that for us to sign a potential 10-year short-wave contract for the Pacific made no economic sense for us on the basis of at least \$2.8 million a year for the next 10 years. So we absolutely made a decision based on—

Senator GRIFF: But there is the work you have done, the research that you have undertaken yourself, and you have had companies undertake this research. Who has undertaken this research?

Ms Guthrie: We have an international development team who are very connected with the circumstances in each of the countries in which we operate.

Senator GRIFF: Will you be able to table that research?

Ms Guthrie: I will have to take that on notice.

Answer:

The ABC has utilised both external research and commissioned its own internal research to ascertain audience listenership trends in Papua New Guinea and the Pacific. Broadly speaking, there is consensus in this research that listeners in these countries are moving away from traditional forms of radio listening to Internet streaming and listening via mobile phones.

The research included:

- The November 2012 Lowy Institute Analysis paper 'Digital Islands: how the Pacific's ICT Revolution is Transforming the Region' - <https://www.lowyinstitute.org/publications/digital-islands-how-pacifics-ict-revolution-transforming-region>
- The May 2013 Citizen Access to information in Vanuatu report. See attached
- The September 2013 Solomon Islands Media Assistance Scheme (SOLMAS) Social Media and Mobile Qualitative Research report. See attached.
- The 2014 Coffey report, 'Utilising Mobile Phones for Development in Papua New Guinea: Lessons Learnt and Guiding Principles' - <http://www.coffey.com/assets/Ingenuity/Insight-Mobile-Phones-in-Rural-Service-Delivery-in-Papua-New-Guinea-20150408.pdf>

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- The 2014 Citizen Access to Information in Papua New Guinea report. See attached.
- The 2015 Pacific Region Infrastructure Facility online report 'Economic and Social Impact of ICT in the Pacific' - <http://theprif.org/index.php/news/53-media-releases/169-prif-ict-study>
- The GSMA's 'The Mobile Economy Pacific Islands 2015' report - <http://www.gsma.com/mobileeconomy/pacificislands/>

Citizen Access to Information in Papua New Guinea 2014



Foreword

| The media landscape in Papua New Guinea is changing rapidly. As a national public service broadcaster, the National Broadcasting Corporation (NBC) of Papua New Guinea plays a key role in facilitating information sharing, dialogue, transparency, and reflecting the diversity of issues and cultures across the country. As the market evolves with new players in television broadcasting, increasing penetration of internet and growing competition in radio, NBC must constantly reassess its ability to meet the information needs of citizens.

| The Citizen Access to Information in Papua New Guinea 2014 study captures the changes in this dynamic and diversifying media market over the past three years. It also reflects NBC's commitment to deliver important information in engaging and innovative delivery formats to Papua New Guinean citizens.

| Australian Broadcasting Corporation International Development, through the Media for Development Initiative, funded by the Australian Department of Foreign Affairs and Trade, works in partnership with NBC. This valued partnership between ABC and NBC aims to strengthen and support NBC's mission to give a voice to Papua New Guinean citizens by providing nationwide access to information, reflecting the country's culture and delivering development content for the benefit of the people.

| This report may also be beneficial to the broader media sector in Papua New Guinea to reflect on the evolving media environment in the country.

| Looking to the future, our partnership with NBC will continue to build on its strengths and draw on its learning and experience, with continued support from the Australian Government. We believe in the value and contribution of NBC as a public service broadcaster that can operate in a competitive market space, while fulfilling its obligations to inform, educate and entertain the citizens of Papua New Guinea.

| I would like to acknowledge the author of the report, Klara Debeljak from M&C Saatchi World Services and their research team for their splendid effort on this report. I would also like to thank Memafu Kapera, Managing Director of NBC, for his leadership and support. In addition, the study would not have been possible without the support of the Australian High Commissioner, Deborah Stokes, and her colleagues, especially the Democratic Governance Team in Papua New Guinea. And most importantly I would like to acknowledge and thank those who participated in the study, the people of Papua New Guinea, who willingly gave their time contributing their valuable insights.



Domenic Friguglietti
Head, Pacific and the Mekong
Australian Broadcasting Corporation International

Acknowledgments

| The Citizen Access to Information in Papua New Guinea 2014 study was commissioned by the Australian Broadcasting Corporation International Development and funded by the Australian Department of Foreign Affairs and Trade, with the aim of providing information and insights on the media landscape in Papua New Guinea.

| The study was conducted by M&C Saatchi World Services Research & Insight in collaboration with Butuna Smith Research Consultancy. The research was led by Klara Debeljak, Director of Research at M&C Saatchi World Services Research & Insight, who is also the primary author of this report.

| This report could not have been prepared without contributions from Dr Gerry Power, Chief Research Officer at M&C Saatchi World Services Research & Insight, who provided strategic input and Dr Lauren Frank, Assistant Professor at Portland State University, Oregon who led the advanced analysis of the quantitative data. We also thank our data quality control partner Swisspeaks.

| We are grateful for the invaluable input from and collaboration with Australian Broadcasting Corporation International Development, particularly for contributions and strategic guidance provided by Sam Freeman, Vipul Khosla, Angela Davis, Isabel Popal and Domenic Friguglietti.

| Finally, we would like to thank all research participants for taking part in this study and sharing their insights with the research team.

| Please note that any opinions represented in this report are those of the authors and research participants and do not necessarily reflect the views of the Australian Broadcasting Corporation, National Broadcasting Corporation of Papua New Guinea or the Australian Government.

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Glossary

BASE

The number of participants in the survey who formed the basis for a particular calculation presented in the report.

BOOMBOX

A device that allows people to purchase and download songs to memory cards or USB, but does not necessarily provide access to the radio. While boomboxes have been present in PNG for some time, the results of this study suggest that their use among youth has grown substantially since the 2011/12 study.

GARAMUT

A slit-drum made from a hollowed-out log.

HAUS PIKSA

House Picture (A village cinema house).

MEDIA ACCESS

Availability of different media devices (radio, television, mobile phone, computer, internet) within the household. These media items should be in a working order to be considered available.

MEDIA CONSUMPTION

The use of various types of media, i.e. listening to the radio, watching television, browsing the internet, using mobile phone and newspaper reading.

NATIONAL

The term “national” or “nationally” in this report is used in reference to the eight provinces included in this study.

REACH

The share of PNG citizens who have listened/ watched/used/read specific media within a specific timeframe (e.g. in the last week, in the last month, in the last year).

TRIBE FM

Broadcast on NBC National Radio every Saturday night from 9pm to 12am. The program is sometimes relayed by provincial NBC stations from 10pm until 12am, when local broadcasting ends.

YOUTH

In the context of the quantitative survey, “youth” is used to describe respondents 15–24 years of age and in the context of the citizen discussion group participants aged 18-24.

YUMI GO WER?

A multi-platform (radio, TV, social media) NBC brand that promotes informed public discussion on governance issues. Under the Yumi Go Wer? brand, NBC broadcasts a weekly 15-minute show on Kundu TV, a live radio panel show on provincial and national radio and topical governance news.

Acronyms and Abbreviations

ABC

Australian Broadcasting Corporation

ABC ID

Australian Broadcasting Corporation
International Development

BBC

British Broadcasting Corporation

DFAT

Department of Foreign Affairs and Trade

FM

Frequency Modulation

IMF

International Monetary Fund

NBC

National Broadcasting Corporation
of Papua New Guinea

NGO

Non-Government Organisation

NRL

National Rugby League

PACMAS

The Pacific Media Assistance Scheme

PNG

Papua New Guinea

SMS

Short Message Service

SW

Short wave

US

United States of America

WHO

World Health Organization

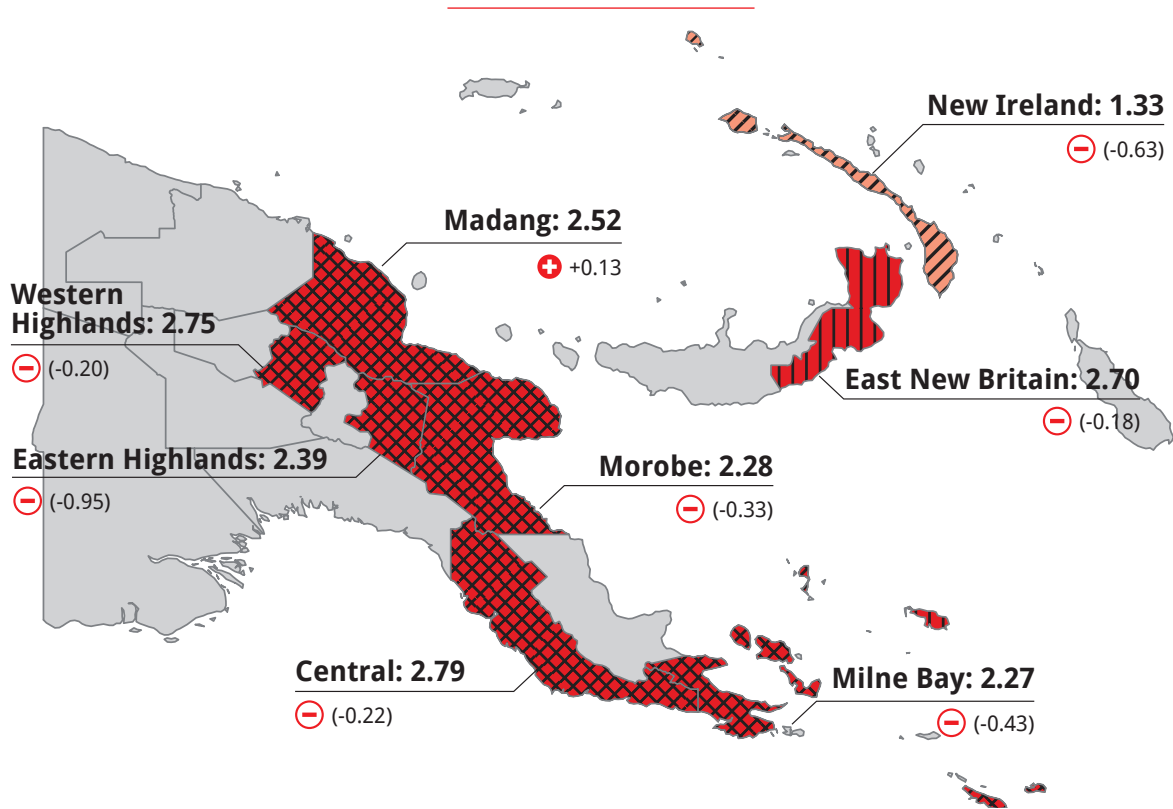
Executive Summary

NEW DEVELOPMENTS

FALL IN THE OVERALL MEDIA ACCESS AND USE

The results of the 2014 audience study indicate that overall media access and use across most of the eight provinces included in the study have decreased over the past three years. Access and the use of various media have reduced the most in New Ireland, which was already identified as the most media poor in the 2011/12 study, and in Eastern Highlands. Conversely, Madang appears to be the only province where overall access and consumption of different media has improved, largely because of the significantly increased household access and use of internet (see Figure 1).

**Figure 1:
Media Index Score by Province**



<p>Bold Index Score: The Total Media Index Score (based on Media Access Index and Media Use Index)</p>	<p>Un-bolded score in brackets: The change in Total Media Index Score since 2011/12</p> <p>⊖ Negative change</p> <p>⊕ Positive change</p>	<p>Media Access Index:</p> <table border="1"> <tr><td>0-1.00</td><td>Very Low</td></tr> <tr><td>1.00-2.00</td><td>Low</td></tr> <tr><td>2.01-3.00</td><td>Medium</td></tr> <tr><td>3.01-4.00</td><td>High</td></tr> <tr><td>4.01-5.00</td><td>Very High</td></tr> </table>	0-1.00	Very Low	1.00-2.00	Low	2.01-3.00	Medium	3.01-4.00	High	4.01-5.00	Very High	<p>Media Use Index:</p> <table border="1"> <tr><td>0-1.00</td><td>Very Low</td></tr> <tr><td>1.01-2.00</td><td>Low</td></tr> <tr><td>2.01-3.00</td><td>Medium</td></tr> <tr><td>3.01-4.00</td><td>High</td></tr> <tr><td>4.01-5.00</td><td>Very High</td></tr> </table>	0-1.00	Very Low	1.01-2.00	Low	2.01-3.00	Medium	3.01-4.00	High	4.01-5.00	Very High
0-1.00	Very Low																						
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2.01-3.00	Medium																						
3.01-4.00	High																						
4.01-5.00	Very High																						

The **Media Access Index** is based on the citizens' household ownership of radio, TV, computer, internet and mobile phone.
The **Media Use Index** is calculated based on the reported use of radio, TV, internet, mobile phones and newspapers.

SIGNAL PROBLEMS AND FALLING INTEREST IN RADIO CONTRIBUTE TO REDUCED RADIO LISTENERSHIP

Radio, in particular, saw a notable drop in regular use over the past three years. This can be linked to three factors: reduced household access to the radio; worsening radio signal in some provinces; and falling interest in radio, particularly among the youth and in urban areas, where there is increasing preference for TV and internet as an alternative to the radio (see section 2.1.2.1. for further details). The overall fall in radio listenership is also reflected in reduced weekly radio listenership of most radio stations, including NBC.

IN URBAN CENTRES TV SURPASSES RADIO AS AUDIENCE PREFERENCE

Regular TV use has remained relatively consistent over the past three years. However, when citizens have regular and reliable access to multiple radio and TV stations, TV is preferred by many, primarily due to the combination of audio and visual elements. This trend can be expected to continue and it is likely that TV use will start catching up with radio listenership on the national level when TV infrastructure improves and the market diversifies.

MOBILE PHONE USE DECLINES IN SOME PROVINCES

While some parts of the country, including Central, Milne Bay, Madang, Western Highlands and East New Britain saw no significant change in weekly use of mobile phones, Eastern Highlands, New Ireland and Morobe recorded a slight decline in this area. While survey data provide limited explanation for this trend, contextual information and observations from the field suggest that this may, at least in part, be associated with people's weaker financial situation. This may mean that, compared to 2011/12, many citizens use mobiles only when they can afford to buy mobile phone credit or if necessary.

CONTINUING CHALLENGES

MEDIA CONSUMPTION STILL LARGELY DICTATED BY MEDIA ACCESS

As in the 2011/12 study, consumption of different media continues to remain largely a function of media access, rather than choice. This is particularly true in rural areas, where media access remains limited by poor infrastructure and signal (for radio, TV and internet) as well as cost (for newspapers and internet). In Port Moresby, where access to media is less of a challenge, media consumption is more commonly dictated by choice, particularly among young people.

HOUSEHOLD MEDIA DEVICES REMAIN CONTROLLED BY MEN

The household balance of power that dictates control over the media devices remains largely unchanged. Men continue to have significantly more say in how and when these devices are used. The internet is the only medium where the gender dynamics have improved, with the gap between men and women's control over internet use narrowing considerably. This trend may be, in part, associated with a growing use of internet on mobile phones, which due to their personalised nature allow their users greater control over how and when they access the internet. Conversely, those who access internet at home via computer typically share such access with other household members and are less likely to have full control over its use.

SIGNAL STILL ONE OF THE MAIN BARRIERS TO NBC RADIO LISTENING

Poor signal continues to be one of the key barriers to NBC radio listening. In some areas, particularly rural, the signal has reportedly worsened further over the past three years. Citizens in some parts of the country, such as West New Britain, report that the signal is weak and sporadic, while others note that they are no longer able to listen to NBC, as they cannot detect any signal at all. These citizens can only listen to radio when they travel to the city where the signal tends to be stronger, or have stopped listening to the radio altogether and are turning to print media for news and current affairs instead.

NBC CONTINUES TO BE VALUED FOR NEWS, BUT ITS MUSIC AND ENTERTAINMENT CONTENT IS STILL SEEN AS A KEY WEAKNESS

Listeners interested in news continue to appreciate NBC for its thorough, reliable and trustworthy coverage of current affairs but increasingly prefer other stations for lighter content and music. As a result, the attention of older listeners, who generally have keener interest in news and have access to multiple stations, tends to be split; NBC, is listened to for current affairs, and other radio stations are preferred for non-news content. On the other hand, many younger listeners, who have less interest in news, turn solely to commercial stations, with greater focus on entertainment content and modern music. This presents a challenge to NBC's ability to attract a new, younger audience base.

NO IMPROVEMENT IN PERCEPTIONS OF NBC'S PRESENTERS AND PRESENTATION STYLE

In addition to continuing challenges with lighter content and music, the 2014 study also showed no improvement in audience perceptions of NBC's quality of presentation style since 2011/12. Similarly to the previous study, NBC listeners considered NBC's presentation style old fashioned and not competitive with other, commercial radio stations. This aspect is particularly important to young listeners, who prefer a modern, dynamic style of radio presentation and are alienated by outdated, monotonous and passive presenters.

TRIBE FM WITH LIMITED RECOGNITION AMONG THE TARGET AUDIENCE

Despite young people's high interest in radio programming that caters to their specific needs, the reach of NBC's youth radio program Tribe FM remains very low. At present, the majority of its audience is male, concentrated in urban centres and most of them live in Momase or the Highlands region.

EMERGING FINDINGS

CHURCHES EMERGE AS THE MOST TRUSTED SOURCE OF INFORMATION

Churches, which were not included as a source of information in the 2011/12 study, emerged as the source of information that is considered the most trustworthy by PNG citizens, ahead of all mass media and other word-of-mouth sources. The trust in churches is high among people in both urban and rural areas, across genders, all age groups and levels of education.

STRONG INTEREST IN YUMI GO WER?, BUT AWARENESS LOW

Yumi Go Wer? is a new local panel show featuring development stories to encourage growth and change in PNG. So far, Yumi Go Wer? has generated a very small audience, with less than one in ten survey respondents having watched or listened to the show. However, the majority of respondents recognised the value of such a program for themselves and their communities and suggested a number of topics they would like to see covered by the show, including health issues affecting youth (e.g. TB, HIV/AIDS, maternal health and teenage pregnancies), education and governance issues, such as government transparency.

FUTURE TRENDS

TV USE LIKELY TO START CATCHING UP WITH RADIO AS TV INFRASTRUCTURE IMPROVES

As noted, in media rich areas the interest and popularity of TV is already surpassing radio as the preferred provider of news and information. As infrastructure across the country improves and media consumption becomes defined by choice, rather than access, this trend can be expected to continue and TV use on the national level is likely to start catching up with and potentially overtake radio listenership.

TRUST IN NEW MEDIA TO IMPROVE WITH INCREASING USE

Trust in newer types of media, such as the internet and social media is currently very low. However, this is likely linked to the still very limited numbers of PNG citizens who use these sources on a regular basis. As the evidence from other developing countries suggests, these media are likely to be considered more trustworthy as access to the internet and its use increases.

RAPID RISE OF SOCIAL MEDIA

Compared with the 2011/12 study, the use of social media (particularly Facebook) among PNG citizens has increased considerably and will likely continue to rise further, in line with global trends. An increase in its overall consumption is also likely to result in the diversification of its user base, which is at present still concentrated among men, those who live in urban centres and younger and better-educated citizens.

CONTINUING GROWTH OF MOBILE INTERNET USE

Similarly, the research indicates that the use of mobile phones to access social media as well as internet in general continues to grow – a trend that is likely to remain strong, particularly if the download and upload speeds continue to improve and the cost of mobile data use declines further.

DISASTER BROADCASTING

LOW OVERALL PREPAREDNESS FOR NATURAL DISASTERS

The overall preparedness for natural disasters among PNG citizens across the country, including awareness of how to prepare for these events and how to stay safe while the disaster is happening, is low. Disaster readiness is particularly low in Madang, while those who live in East New Britain feel the most prepared for these events. Generally, the level of preparedness is highest for disasters that are the most common in a particular province and that citizens have experienced in the past.

INFORMATION ABOUT DISASTER RISK, PREPAREDNESS AND RESPONSE HIGH ON CITIZENS' INFORMATION AGENDA

Citizens across the country consider information about disaster risks, preparedness and response crucial to their daily lives and believe that the amount and quality of this information provided by the media, the government and other organisations should be significantly improved.

RADIO KEY SOURCE OF INFORMATION ON NATURAL DISASTERS, BUT MISSING AN EDUCATIONAL COMPONENT

Radio is the main source of information on natural disasters for about three quarters of all PNG citizens, followed by friends and family with 56%¹. However, information provided by radio stations is typically limited to warnings about impending natural disasters during weather reports and coverage on recent disasters and associated damage. Educational programming provided outside of the immediate threat of a specific disaster that would help citizens better prepare and respond to these events is absent.

WORD-OF-MOUTH PLAYS A CRUCIAL ROLE IN DISASTER PREPAREDNESS AND RESPONSE

In the absence of sufficient educational programming and information on how to prepare and respond to natural disasters provided by the media or the government, many citizens rely heavily on word-of-mouth sources. Knowledge of how to prepare for such events to protect life and property, and how to react if natural disasters occur is typically passed from one generation to the next as many rely on their parents and other elders in their community for advice on these issues.

¹ n = 1,303 respondents

A decorative graphic consisting of two thick, curved bands. The upper band is red and curves downwards from the left towards the right. The lower band is dark grey and curves upwards from the left towards the right. The two bands meet at a point on the right side of the page.

1. INTRODUCTION

| The 2014 Citizen Access to Information in Papua New Guinea study was conducted between April and August 2014, as a follow-up to a similar research study implemented in 2011/12.² The 2014 study had the following key objectives:

- To assess the current level of media access of Papua New Guinean (PNG) citizens across selected PNG provinces and determine changes in access over the past three years. This includes any shifts in the barriers to media access identified in the 2011/12 study, as well as any changes in the level of control that different members of the household have over the use of various media devices in their home.
- To identify any changes in citizens' **media consumption patterns**, including their use of mobile phones, internet and social media and their listening, reading and TV viewing habits.
- To explore trends in citizens' **views on media freedom and freedom of expression** and to evaluate their view on the **trustworthiness of different media**, compared to 2011/12.
- To provide insight into **citizens' preference for different media genres and formats**.
- To understand any changes in **audience perceptions of different media outlets**, particularly **National Broadcasting Corporation (NBC)** and **Kundu TV**, and to assess their views on **Tribe FM** and the new live radio panel show, **Yumi Go Wer?**.
- To assess the **current level of citizens' preparedness for natural disasters** across different provinces and determine the most pressing information needs and gaps in this area.

| As in 2011/12, the 2014 study included a combination of citizen group discussions in four provinces, namely Central, Western Highlands, West New Britain and Morobe, and a quantitative survey in eight provinces including Central, Milne Bay, Madang, Morobe, Eastern Highlands, Western Highlands, East New Britain and New Ireland. The methodological approach used in both the qualitative and quantitative element of the 2014 research replicated the design of the 2011/12 study, in order to ensure direct comparability of the data and results between the two studies.

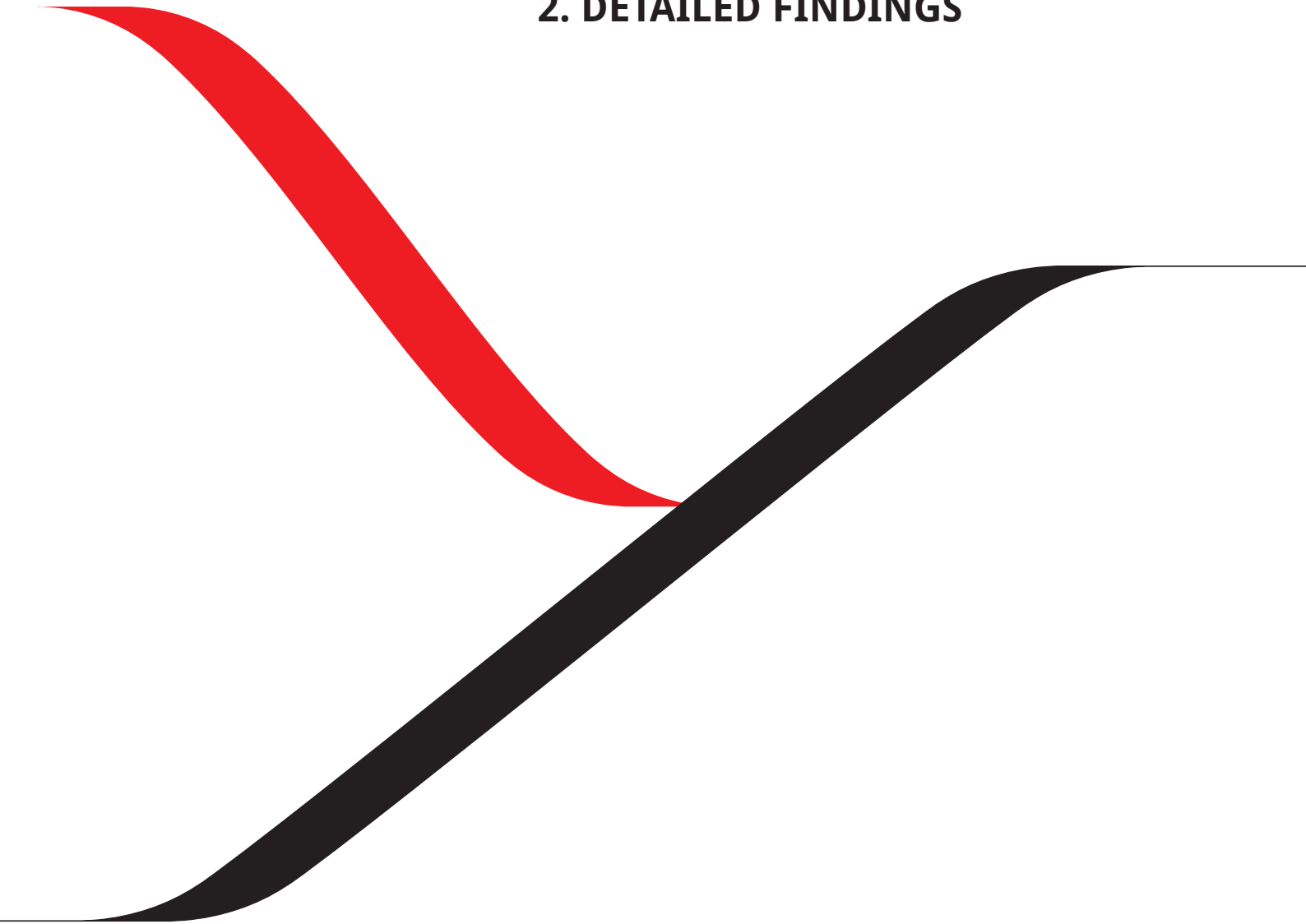
2 ABC International Development, InterMedia. (2012). *Citizen Access to Information in Papua New Guinea 2012*. Retrieved November 9, 2014, from ABC International Development: <http://www.abcinternationaldevelopment.net.au/activities/citizen-access-informati%20on-papua-new-guinea-2012>

| It is important to note that the context in which the 2014 study was conducted resulted in some limitations for the interpretation and comparability of the results, particularly in relation to the quantitative survey:

- First, while the 2011/12 study had been implemented during school holidays, the 2014 research was conducted during the academic year. Although the share of the student respondents in the 2014 survey sample did not significantly differ from the share that had been recorded in the 2011/12 survey, this difference in the timing of the survey may have nevertheless influenced some of the results, particularly those related to media consumption patterns.
- Second, due to the nature of the survey sample design (see Methodology section for further details) and the limited data available from the national census, the results of the 2014 survey can be considered representative of the population by gender and age, but not by other demographic categories, such as education or income.
- Third, while the nature of the sample design and application of weighting (see Methodology section for further details) ensured that the samples in the 2011/12 and 2014 studies matched by gender, age, income and urban/rural split, comparability of the two samples on other demographic variables cannot be claimed.
- Fourth, when discussing the use of computers and mobile devices, respondents were not asked specifically about their use of tablets. This should be taken into account for future studies.
- Finally, NBC Brand Perception Index (section 2.2.1.) and Kundu TV Brand Perception Index (section 2.2.3.) are not directly comparable, because the type of audience these indices were based on differed between the two brands. Specifically, NBC Brand Perception Index was calculated taking into account the perceptions of those who listened to any NBC radio station yesterday, in the last seven days or in the last four weeks, while Kundu TV Brand Perception Index was based only on those who watched the station yesterday or in the last 7 days.

| This report is divided into four core sections. In the Executive Summary we discuss the key findings of this study across different topics. In the next section we explore in more detail the insights on media access, media consumption patterns and perceived trust in media, and citizens' consumption of different NBC media offerings and their perception of the broadcaster. Section 3 outlines the key considerations for NBC for optimising their engagement with the PNG population. Section 4 provides a detailed explanation of the research methodology used in this study and the last section outlines the key external sources and documents that were used in the writing of this report.

2. DETAILED FINDINGS



2.1. Developments in Media Access, Use and Trust in Media

2.1.1. MEDIA ACCESS AND CONTROL

| The period between 2011/12 and 2014 saw significant changes³ in the level of household access to different media types in Papua New Guinea, led by a considerably reduced dominance of **radio** as the most widely owned mass media device in the country (see Figure 2). This significant fall may be linked to three factors: a worsening signal in several provinces, falling interest in radio among the youth, and increased overall access to TV and internet in some provinces. For example, Western Highlands, which recorded a 13% drop in household access to the radio since the 2011/12 study, at the same time saw a 19% increase in home access to TV and a 9% increase in access to the internet.

| The 2014 study also revealed a small drop in household **mobile phone**⁴ and **computer**⁵ ownership, a slow rise in household **internet** access and an overall stagnation of household **TV** ownership.

| However, it is important to note that these overall media access trends manifest in various ways in individual provinces. While considerable differences in household media access between the provinces were observed in the 2011/12 study, three years later, some disparities remain constant while others have grown.

| The most significant change was observed in **New Ireland** which saw a reduced household access to all media devices, except the internet. This is particularly concerning as the province had already been identified as the most media poor part of the country in the 2011/12 study, with its residents having the least access to different media devices among all eight provinces included in the research. In 2014 only 36% of all respondents⁶ from New Ireland reported having a radio in the household, compared to 64% or more in each of the other provinces. Only 2% of New Ireland residents own a TV, which is the lowest share among all parts of PNG.

| In the 2011/12 study, **Eastern Highlands** was identified as one of the most media rich provinces. A similar downward trend was observed here, although the impact of this fall is considerably less dramatic than in New Ireland, given the previously high level of media access and media use indicated by the 2011/12 study. Mobile phone ownership and household ownership of radio and TV saw a notable decline, while access to the internet and computers remained stable.

| One of the reasons for these significantly lower levels of household media ownership in Eastern Highlands may be a worsening economic situation of the province, which may be linked, in part, to the unfavourable developments in sectors that form the backbone of the province's economy, such as coffee production. The disposable incomes of the coffee-cultivating population in Eastern Highlands,

3 Please note: only statistically significant changes have been reported in the text of this research report.

4 The World Bank data suggest that the mobile phone subscriptions in PNG have risen from 38 to 41 per 100 people from 2012 to 2013. However, it is important to note that the methodology used by the World Bank is different to the methodology that was used in this survey; hence the results are not directly comparable. The World Bank. (2014). *Mobile cellular subscriptions (per 100 people)*. Retrieved November 9, 2014, from The World Bank: <http://data.worldbank.org/indicator/IT.CEL.SETS.P2>

5 If invalid responses (Don't know and Refused to answer) are removed from the basis for this calculation and only valid responses (Yes and No) are taken into account, the household access to computers between 2011/12 and 2014 remained unchanged.

6 n = 161

which overall produces 37% of all coffee in PNG,⁷ has likely been affected by two important developments since the 2011/12 study – a significant reduction in the overall production of coffee in PNG and falling coffee prices in the global market. According to International Coffee Organization, the average coffee price fell from 210.49 US cents per pound of coffee in 2011, to 156.34 US cents in 2012, and decreased further to 119.51 US cents in 2013, representing an overall fall of 43% since 2011.⁸ Furthermore, the overall coffee production in Papua New Guinea halved from 2011 to 2012 (from a record 1.4 million bags in 2011 to 0.7 million in 2012) and has failed to rise back to the previous record level in 2013, with 0.8 million bags produced in 2013.⁹ Lastly, citizens' disposable incomes were further affected by the rising inflation, which on a national level rose from 2.2% in 2012 to 6% in 2014¹⁰.

| Lower disposable household incomes in these areas likely affected citizens' spending priorities and may mean that these citizens now allocate more of their financial resources to basic goods and are less likely to either purchase new media devices or maintain the existing ones in a working order.

| Household access to the radio also decreased in **Milne Bay** and **Western Highlands**, although not as prominently as in New Ireland and Eastern Highlands. On the other hand, the residents of Milne Bay report better access to computers than in 2011/12, as do those in Western Highlands who have greater household ownership of TV and internet. Home access to mobile phones saw a minor fall in Milne Bay but remained unchanged in Western Highlands.

| **Morobe** residents in 2014 had similar household access to most media devices as in 2011/12, including radio, TV and internet, but reported reduced ownership of mobile phones and computers. This fall in the share of households with access to mobile phones and computers and stable access to internet suggests that while a smaller proportion in 2014 owned a computer or a mobile phone, those who did were more likely to own an internet-enabled device than in 2011/12. Interestingly, Morobe also has the highest share of mobile phone owners who have a smart phone among all provinces, namely 42%,¹¹ compared to 34% in Central as the province with the second highest share¹² and 29% nationally.¹³

| As such, the gap between those with diverse media access (mobile, internet, radio on a mobile etc.) and those with limited media access in the province may be increasing.

| **East New Britain** saw little change since 2011/12, with household access to most media remaining unchanged. The only exception was respondents' household access to computers, which was recorded at a lower level than in 2011/12.

7 The majority of coffee is produced by smallholder farmers rather than large estates. Oxford Business Group. (2012). *Papua New Guinea: Coffee industry builds steam*. Retrieved November 9, 2014, from Oxford Business Group: <http://www.oxfordbusinessgroup.com/news/papua-new-guinea-coffee-industry-builds-steam>

8 International Coffee Organization. (2014b). *ICO Indicator Prices – Annual and Monthly Averages: 2001 to 2014*. Retrieved November 9, 2014, from International Coffee Organization: <http://www.ico.org/prices/p2.htm>

9 International Coffee Organization. (2014a). *Exporting Countries: Total Production – Crop Years Commencing 2008-2013*. Retrieved November 9, 2014, from International Coffee Organization: <http://www.ico.org/prices/po.htm>

10 International Monetary Fund. (2014). *World Economic and Financial Surveys World Economic Outlook Database*. Retrieved November 9, 2014, from International Monetary Fund: <http://www.imf.org/external/pubs/ft/weo/2014/01/weodata/index.aspx>

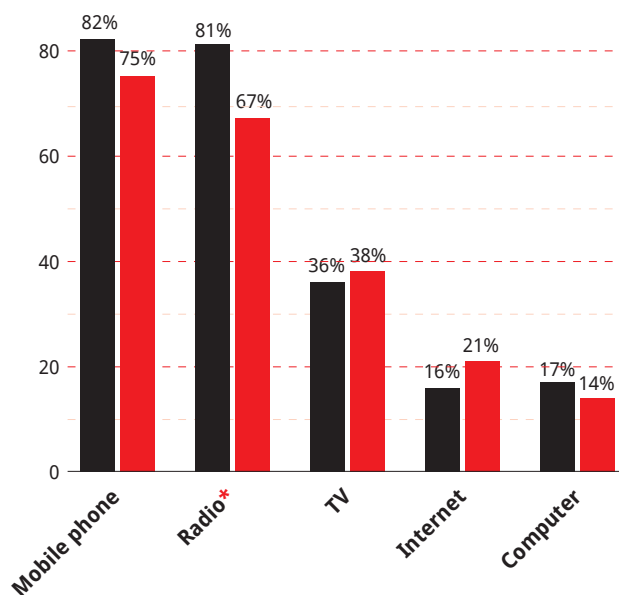
11 n = 84 respondents in Morobe who personally own a mobile phone

12 n = 119 respondents in Central who personally own a mobile phone

13 n = 842 respondents who personally own a mobile phone

| Finally, the most favourable developments were observed in **Madang** and **Central**: residents in Central now have better household access to TV and both provinces have improved access to internet, while keeping the same level of access to other media as in 2011/12.

**Figure 2:
Household media access**



■ 2011/12

■ 2014

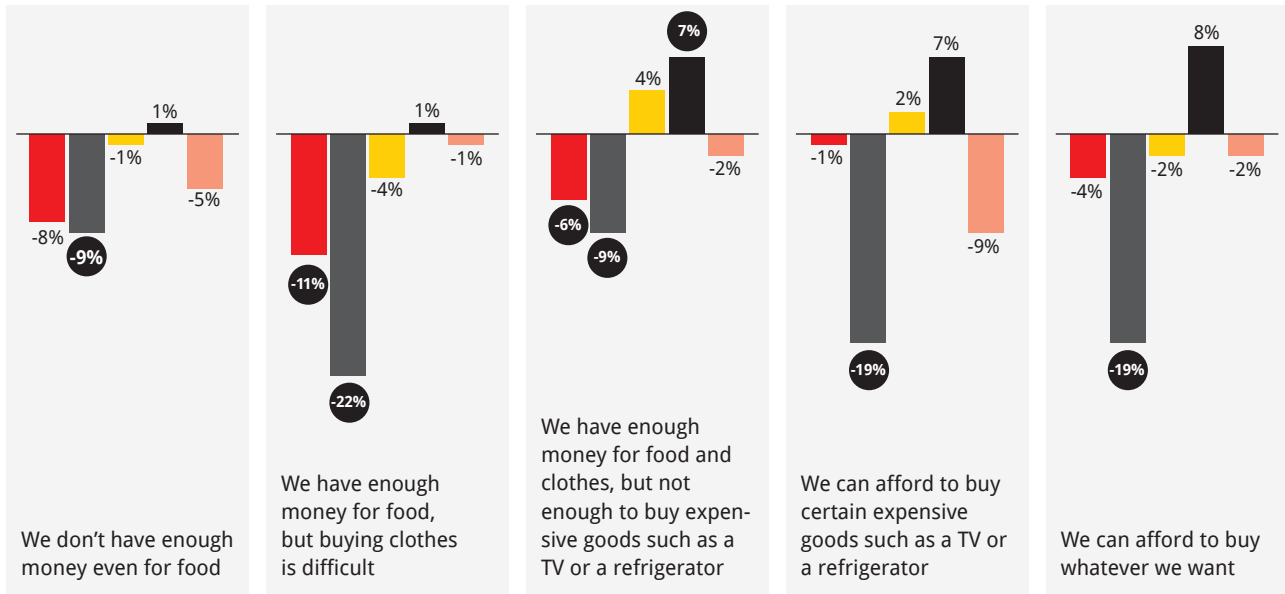
* This includes a radio set in the household, radio on a mobile phone and car radio.

Base:
n = 1,308 respondents in 2011/2012
n = 1,303 respondents in 2014

| It is interesting to note that radio ownership declined across all income levels, with the exception of the lowest economic class (see Figure 2A). This is likely due to the fact that this economic group was already the most media-deprived in 2011/12, with considerably less access to other media sources than the more well-off citizens. As such, this group continues to rely most heavily on radio as an information source, making radio an indispensable household item, while other groups likely feel less affected by the loss of radio, given their more diverse media access.

| Household access to mobile phones significantly declined among the lower and middle income groups (Figure 2A – only changes in red are statistically significant), while the access to other media devices remained stable. The only exception was the internet, which saw a slight but statistically significant rise among the middle income group, who say they generally have enough money for food and clothes and can save a bit, but struggle to buy more expensive devices, such as TV or refrigerator.

Figure 2A:
Change in household media access between 2011/2012 and 2014 by income levels



■ Mobile phone
 ■ Radio
 ■ TV
 ■ Internet
 ■ Computer

Base:
 n = 1,308 respondents in 2011/2012
 n = 1,303 respondents in 2014

x% Statistically significant changes

| While household access to various media devices shifted significantly since 2011/12, the balance of power within the household in terms of who controls how and when these media are used remains largely unchanged.

| Male members of the house continue to have considerably more control over home media devices than females. The differences between genders remain greatest when it comes to the use of the radio set in the house, car radio and TV, and the smallest – yet still significant – for the use of a radio on a mobile phone, where women generally have more freedom over when and how they use it (Figure 3).

| Interestingly, the only media device that saw a notable change in this area since 2011/12 is the internet. In 2014, both men and women reported an improved level of control over how the internet is used in their home compared to 2011/12. However, the gender gap in internet control within the household narrowed significantly. In the 2011/12 study, only 49% of all women with internet in their household¹⁴ reported that they control its use; in 2014 this share increased to 80%.¹⁵ Men reported

14 n = 99

15 n = 128

a similar, but smaller increase from 79% in 2011/12¹⁶ to 91% in 2014.¹⁷ This also suggests that more respondents – men and women – now use more personalised devices with access to the internet (e.g. internet enabled mobile phones rather than computers) than three years ago, which gives the users greater freedom over how and when they access the internet.

**Figure 3:
Personal control over the use of media devices in the household**

Radio						TV		Mobile phone		Internet	
Radio set		Radio on a mobile phone		Car radio							
2011/12	2014	2011/12	2014	2011/12	2014	2011/12	2014	2011/12	2014	2011/12	2014
80%	84%	85%	88%	47%	69%	62%	68%	84%	92%	79%	91%
58%	58%	79%	80%	27%	33%	42%	42%	73%	78%	49%	80%

Female
 Male

% of respondents within the group who agree they have the final say regarding the use of media devices

Base:
n = 1,308 respondents in 2011/2012
n = 1,303 respondents in 2014

| In addition to gender, both age and location also play an important role in determining how much control different members of the household have over different media devices. Taking into account five different types of media (radio, TV, mobile, computer and internet), the 2014 data show that urban youth tends to be the most privileged in terms of the level of control they have over these different media types (Figure 3A). The only three provinces where this is not the case is Morobe, East New Britain and New Ireland, where that role belongs to urban men. On the other end of the spectrum are rural youth, who enjoy the least control over household media in Milne Bay, Western Highlands and New Ireland, and rural women, who are in this position in Central, Madang, Morobe, Eastern Highlands and East New Britain.


| These results also suggest that while urban youth and urban men may be more easily reached through various mass media, successful engagement with rural youth, and, in particular, rural women may require employment of a combination of different channels, including various types of media and word-of-mouth approaches.

16 n = 113

17 n = 140

**Figure 3A:
Overall media control index by subgroup and province**

	Urban youth	Urban men	Urban women	Rural men	Rural women	Rural youth
Central	2.62	2.55	2.19	1.89	1.05	1.32
Milne Bay	2.02	1.81	1.96	1.46	1.12	1.00
Madang	3.29	2.69	2.66	1.77	1.30	1.45
Morobe	1.98	2.43	1.48	1.22	1.09	1.17
Western Highlands	3.36	2.85	2.30	2.14	1.77	1.32
Eastern Highlands	2.59	2.44	2.30	2.03	2.02	2.10
East New Britain	2.17	2.30	1.75	2.18	1.65	1.86
New Ireland	1.57	1.76	1.51	1.35	1.10	1.01
Overall	2.46	2.38	2.03	1.80	1.39	1.37

Most media control  Least media control

Media Control index is based on survey respondents' answers regarding the use of different types of media they have in the household (radio, TV, computer, internet or mobile phone). The index runs from 1-5; the higher the level of media control a particular population segment has within the specific the province.

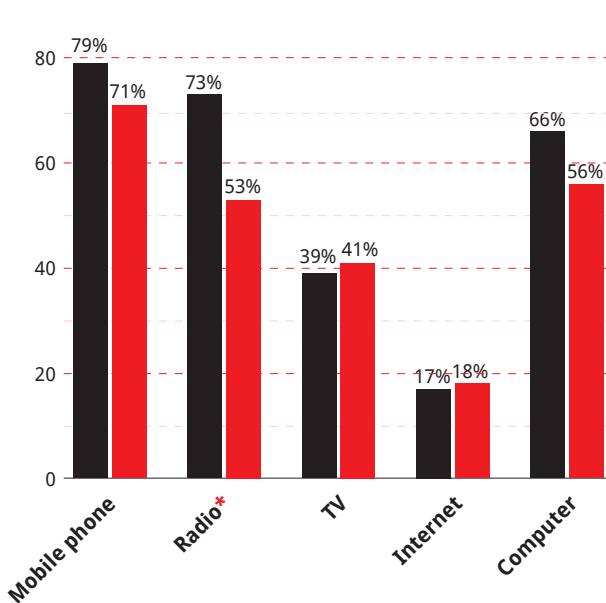
2.1.2. MEDIA CONSUMPTION PATTERNS

2.1.2.1. OVERALL MEDIA USE

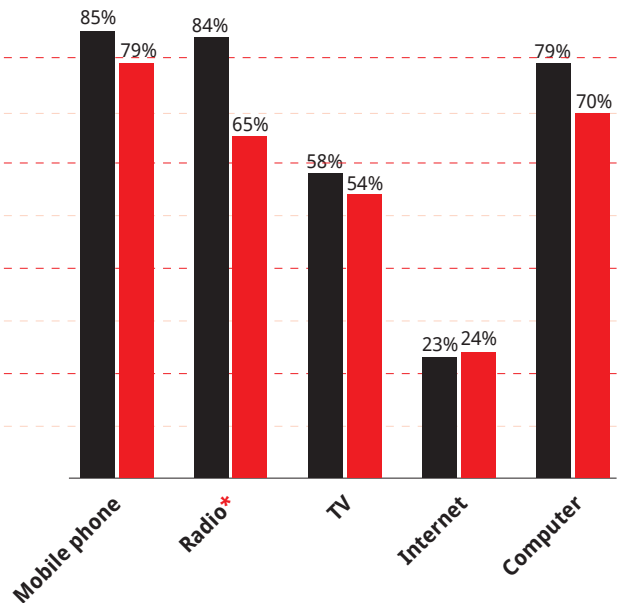
| In line with the findings of the 2011/12 PNG audience study, consumption of different media continues to remain largely a function of media access, rather than choice. This is the case particularly in rural areas, where media access remains limited by poor infrastructure and weak signals (for radio and TV) or cost (e.g. newspapers). In urban centres, such as Port Moresby, where access to media is less of a challenge, media consumption is more commonly dictated by choice.

| In addition to the drop in household media ownership discussed in the previous section, the 2014 study also showed a notable drop in the weekly use of several media, in particular **radio**, **mobile phones** and **newspapers**. Regular **TV** and **internet** consumption on the other hand remained stable (Figures 4 and 5).¹⁸

**Figure 4:
Weekly media use**



**Figure 5:
Annual media use**



18 TV use significantly decreased only on the annual level.

| These changes in media consumption habits are likely associated with *three* factors:

INFRASTRUCTURAL CHALLENGES

Radio signals appear to have worsened in some provinces, contributing to falling trends in radio listening. Over a fifth of all respondents who do not listen to the radio (22%)¹⁹ cite poor or non-existent signals as the main reason, up from 12%²⁰ in 2011/12.

| Poorer signal was also highlighted by some participants of the citizen group discussions:

“Sometimes I go to Lae and that’s when I listen. Here, there’s no radio signal so when it comes to news, we hear people talking and then we go and find a newspaper, or travel to Lae and listen to the radio on the bus while we travel.”

Morobe, male non-listener, 18–24

| A growing number of citizens now face electricity challenges, further limiting their ability to listen to the radio regularly. Fourteen per cent of all those who do not listen to the radio in 2014 noted that they could not do so because of problems with electricity, up from 7% in 2011/12.

| Unpredictable and limited electricity supply also has negative effects on TV consumption and mobile use, as it constrains mobile phone users’ opportunity to charge their mobile phones.

FALLING INTEREST IN RADIO AMONG YOUTH

The findings of the citizen discussion groups suggest that interest in radio among many PNG citizens, particularly the younger generation is falling. Several young people expressed a preference for downloaded music (including on boomboxes) rather than listening to the radio, or noted they prefer to get the content they are interested in from other media, particularly the internet.

“I think it’s because the internet, music and phones are the things that are distracting us from listening to the [radio] stations that are giving important information to us. We have radios on our phones but there’s music there and we are more interested in internet and some other stuff.”

Port Moresby, male non-regular listener, 18–24

“...when they (youth) have mobile phones and radio, they don’t bother to put on news, they use the memory card and the battery they buy is for [music] only.”

Mount Hagen, male non-regular listener, 25+

19 n = 375 respondents who do not listen to the radio

20 n = 178 respondents who do not listen to the radio

| In addition, insights from the citizen discussion groups show that TV is preferred over radio by many of those with regular and reliable TV access, primarily due to its ability to convey news through a combination of audio and visuals. This trend is expected to continue and it is likely that TV use will catch up and potentially surpass radio once TV infrastructure improves and the market diversifies.

“TV is much better than radio but because on TV they show pictures.”

Port Moresby, female regular listener, 18–24

COST

Finally, qualitative research also suggests that cost may be another factor contributing to these trends, and may explain the decline in newspaper readership and regular mobile use. As reported by the IMF,²¹ PNG’s inflation rose repeatedly over the last three years, with average consumer prices rising 2.2% in 2012, 3.8% in 2013 and 6% in 2014.²² In light of the rising cost of living, some PNG citizens may have cut down on non-essential expenses, including the funds allocated to the purchase of print media and talk time for mobile phones.

| Some respondents spoke openly about the fact that their purchase of print media is largely dependent on the funds they have available at a particular time:

“I read [the newspaper], like today’s news... but plenty of things that happen come on again on EMTV. But in news, plenty of things [are covered] by the newspaper, like ways to find employment – in both the National and in the Post Courier. It’s interesting, so when I have money, I buy both papers to read.”

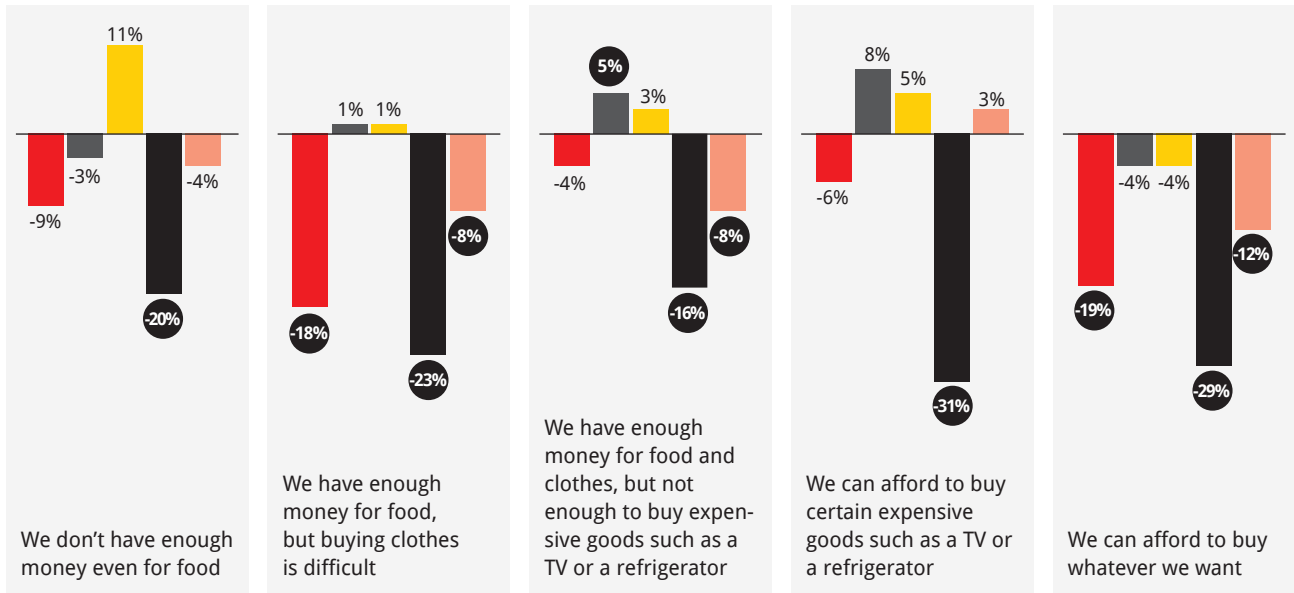
Mount Hagen, male regular listener, 25+

| Regular mobile use and newspaper readership fell across all income levels (Figure 5A – only the changes shown in red are statistically significant). Weekly radio use recorded a significant drop among all income classes, while regular TV and internet use remained stable among all these groups.

21 International Monetary Fund. (2014). *World Economic and Financial Surveys World Economic Outlook Database*. Retrieved November 9, 2014, from International Monetary Fund: <http://www.imf.org/external/pubs/ft/weo/2014/01/weodata/index.aspx>

22 Please note: the inflation rates for 2013 and 2014 are based on IMF estimates.

Figure 5A:
Change in weekly media use between 2011/12 and 2014 by income level



■ Newspaper
 ■ Internet
 ■ TV
 ■ Radio
 ■ Mobile phone

Base:
 n = 1,308 respondents in 2011/2012
 n = 1,303 respondents in 2014

x% Statistically significant changes

| Papua New Guinea citizens' daily access and use of different media types is largely dependent on their daily routine. PNG citizens generally consume media when it fits into their day, rather than actively making time for media use, meaning appointment listeners or viewers are rare. An exception to this rule are evening radio and TV news, with many of those who have reliable access to radio or TV regularly tuning in to both at the end of the day:

“In the morning I wake up and come outside. Sometimes I drink tea, if there’s not much to do, and I get my knife and go to the garden. After the garden I come to the house and wash, eat and after I eat I just sit around doing nothing. Sometimes I listen to the radio, hear music and all that, then I go to sleep.”

Morobe, male non-listener, 18–24

| It is important to note that citizens' daily schedules vary significantly depending on where they live (urban vs. rural areas and which province), their gender and whether they are employed. Those who work in urban areas generally have more opportunities to consume a variety of different media throughout or at the end of their day, while those who stay at home, particularly in rural areas, often listen only to the radio or rely on their family members to bring them the newspaper when they return from work:

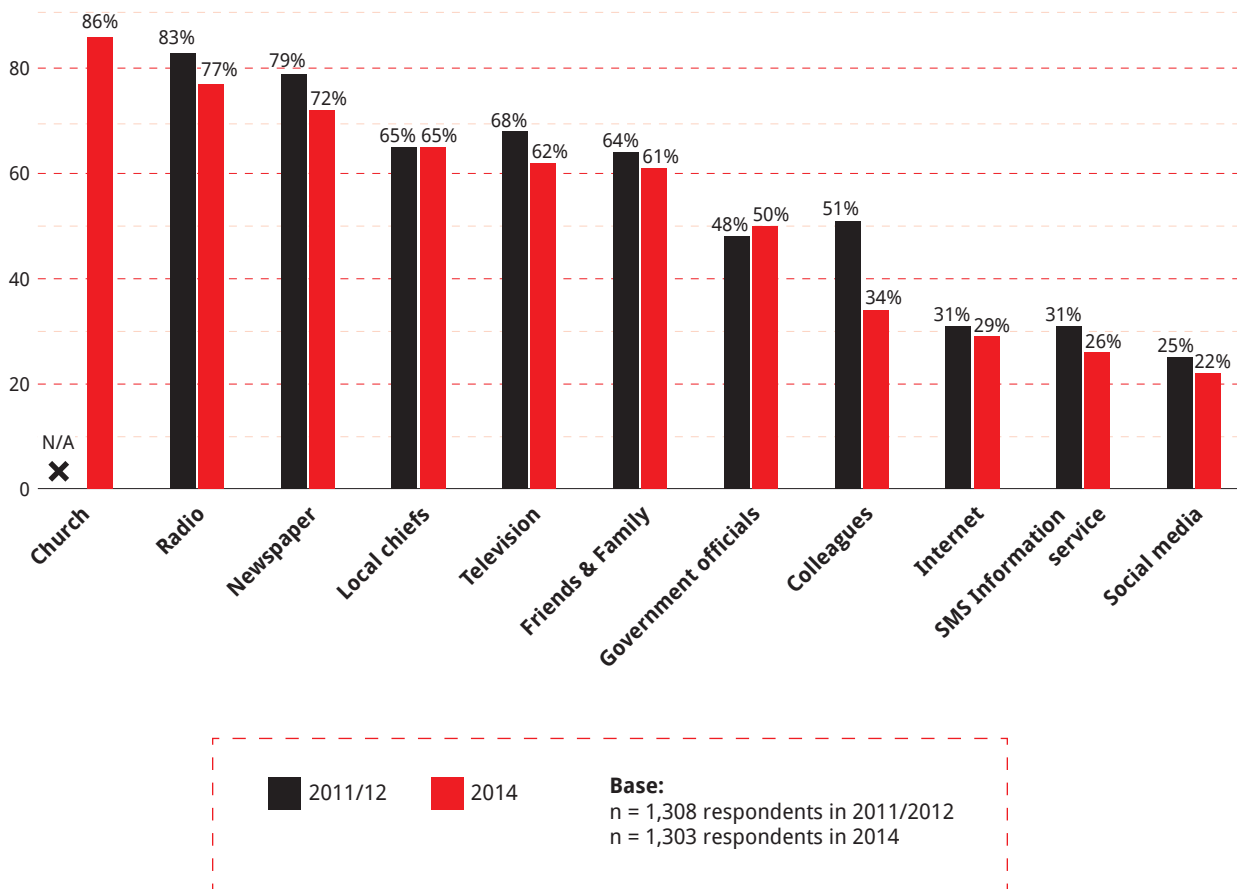
“Because my form of work is on a hire basis, if I’m hired to do something, I just get up [in the morning], have a small bite and then I’m gone. And [for] the rest of the day, if I have nothing to do, I just [sit] around the house, looking for things to do or looking for nothing to do. I try to read the newspaper every day. I want to see what’s happening around the country, and if it’s leading up to weekend, I must read about rugby, what’s happening in sports. Every day I try to make an attempt to at least see one of the newspapers. If not, I watch the TV news or listen to the radio, probably if I’m travelling on the bus and [I listen to] whatever is on in the bus. But at home, I don’t really [listen to the radio]. It’s not like before when you had radios. Now everybody’s got their own choice of what they want to listen to and you don’t really have radios on in the house.”

Port Moresby, regular male listener, 25+

2.1.2.2. TRUST IN INFORMATION SOURCES

| Unlike regular media consumption, the **levels of trust** in different information sources remained broadly unchanged since 2011/12, with **radio** keeping its role as the most trusted mass media source, followed by newspapers (Figure 6).

Figure 6:
Trust in information sources



| **Word-of-mouth** continues to play a crucial role in filling information gaps and is likely to remain an essential source of information for many citizens for the foreseeable future. As in the 2011/12 study, local chiefs, friends and family again emerged in the 2014 survey as crucial and trustworthy sources of information. The 2014 study also confirmed the central role of **churches**,²³ which were identified as the most trusted source of information by far. Trust in churches is high among those living in urban and rural areas, men and women, all age groups, and those with different levels of education.

²³ Please note: “church” as an information source was not included in the 2011/12 survey.

| Participants in the qualitative research also illustrated the central role of word-of-mouth sources. They often spoke about the crucial role pastors, their local chiefs and friends and family play in providing them with basic news on the latest developments in their community and beyond, and with advice on issues that affect them on a daily basis (health, education, livelihood issues, etc).

“We don’t hear things when we stay in the village, but when someone else goes to town and they see the newspaper or hear the radio, then [they] come back and tell us the news. Then we go and tell someone else and we pass the information on, so that everyone can know what’s going on.”

Port Moresby, male regular listener, 25+

“In our village, the means of getting this kind of information is through a big gathering, where a garamut is beaten to pass the message to all the people [to let them know] that there is a big gathering. And there at the meeting the information will be passed to all the people.”

Mount Hagen, female regular listener, 18–24

| Conversely, PNG citizens continue to put the least trust in “newer” sources of information, such as the **internet**, **social media** and **SMS information services**. This is likely a consequence of their lack of familiarity with these sources. For example, trust in the internet among those who use it regularly²⁴ is considerably higher than trust among the PNG citizens overall (70% compared to 29%, respectively). As research from many other developing countries suggests, this picture is likely to shift significantly as access to and use of these sources increases.

24 n = 238 weekly users of internet

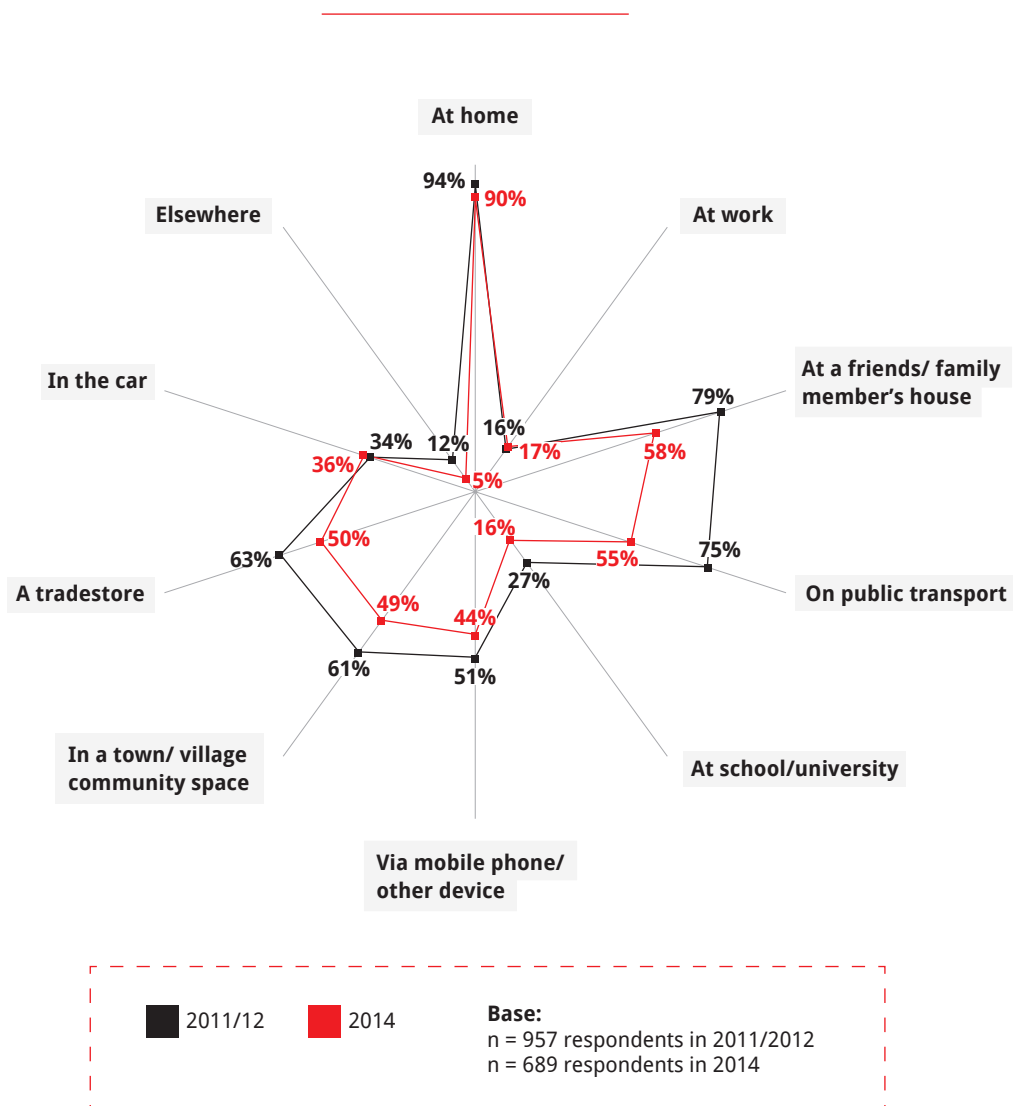
2.1.2.3. RADIO LISTENING HABITS

REDUCED EXPOSURE AMONG REGULAR LISTENERS

Despite the overall fall in radio listening across the country, radio remains one of the most popular and important mass media for many PNG citizens, particularly in rural areas where media access and the diversity of available media is limited. However, insights from the citizen discussion groups suggest that in urban centres with reliable TV signals, such as Port Moresby, TV appears to have started surpassing radio as the preferred choice. As TV infrastructure across the country improves, this trend can be expected to continue and TV viewership is likely to start catching up with radio listenership.

| In addition to the overall fall in radio listening, the latest survey also suggests that the intensity of radio listening among the regular radio audience may have weakened as well. For example, considerably fewer weekly listeners than in the 2011/12 study now access radio content at multiple locations throughout their day, thereby reducing the extent of exposure to different radio content (Figure 7).

**Figure 7:
Locations of radio listening**



| The home remains the primary place for regular listeners to tune into the radio,²⁵ while communal radio listening among the weekly audience declined significantly. Public transport now represents an opportunity to listen to the radio for only 55% of all weekly radio listeners²⁶, compared to 75% in 2011/12.²⁷ Similarly, 58% access the radio at a friend or family member’s house, down from 79% in 2011/12.

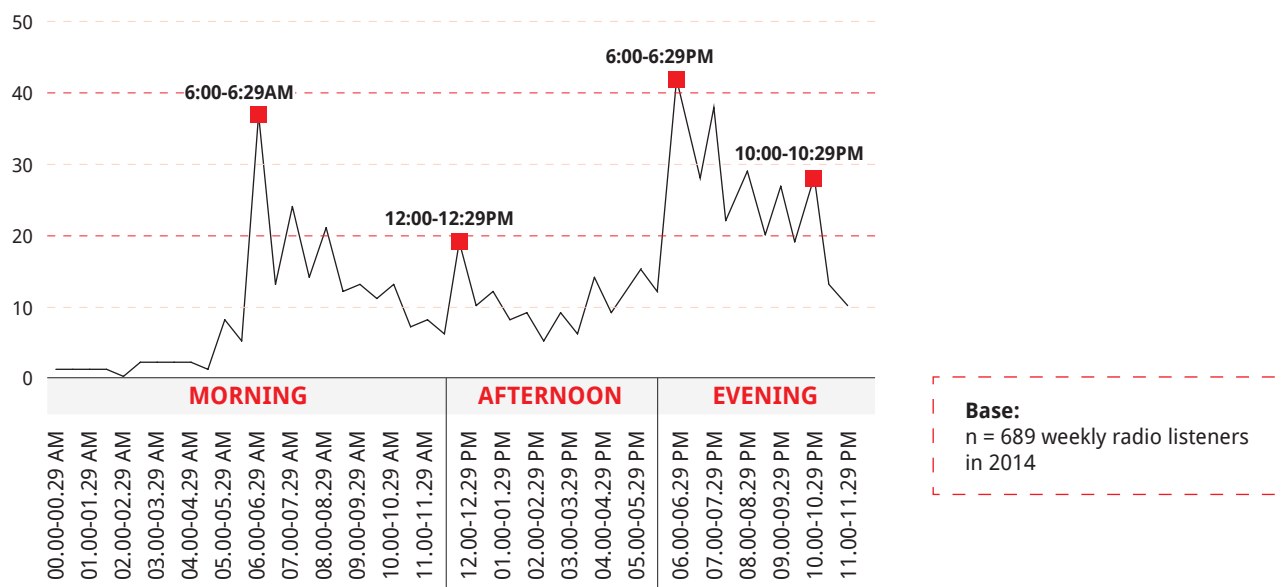
| Listening at school or university, trade store or in a public space also fell, albeit to a lesser extent. The slight drop in listening to the radio on mobile phones can be linked to somewhat reduced overall ownership of mobile phones across the four regions.

EARLY MORNING AND EARLY EVENING PEAK LISTENING TIMES

Regular radio listeners in PNG most commonly tune in to their favourite radio stations at two key times during a regular day: early in the morning around 6am before they commence their daily routine, and again in the early evening around 6pm (Figure 7A). Evening also seems to be the period where most listeners have the time to stay tuned in for a longer period, with radio listenership remaining relatively high until 10.30pm.

| These listening patterns are very similar among all demographic groups – men and women, different age groups as well as among those living in urban and rural areas. This suggests that for many people radio listening may be a group activity, rather than something people do individually. This is also confirmed by insights from the citizen group discussions: many respondents spoke about listening to the radio in the morning as they prepare breakfast and get children ready for school, or in the evening when they sit down with their family for dinner.

**Figure 7A:
Radio listening times**

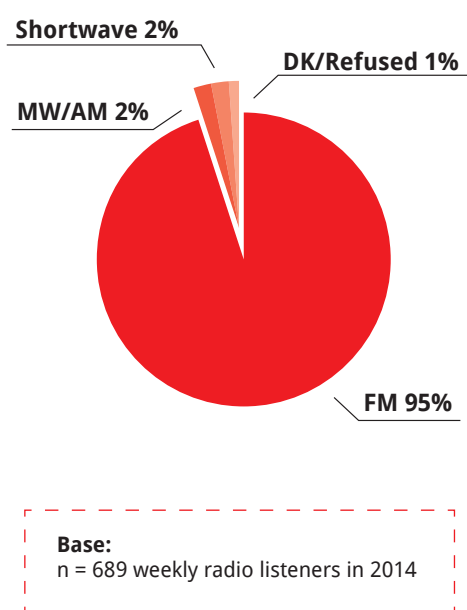


25 The share of those who listen at home remained broadly unchanged, however, please note that the drop from 94% to 90% from 2011/12 to 2014 is statistically significant.
 26 n = 689 weekly radio listeners in 2014
 27 n = 957 weekly radio listeners in 2011/12

FM RADIO STATIONS CONTINUE TO DOMINATE PNG RADIO MARKET

FM radio remains the dominant waveband in the PNG radio space, with less than 5% of all weekly radio listeners tuning into radio programming on any other frequency band (Figure 8). This confirms the results from the 2011/12 study, where 94% of the regular radio audience²⁸ noted they listen to their preferred stations on an FM frequency. It is important to note that this is most likely the result of limited availability of different frequencies, rather than listeners' choice.

**Figure 8:
Wavebands of radio listening**



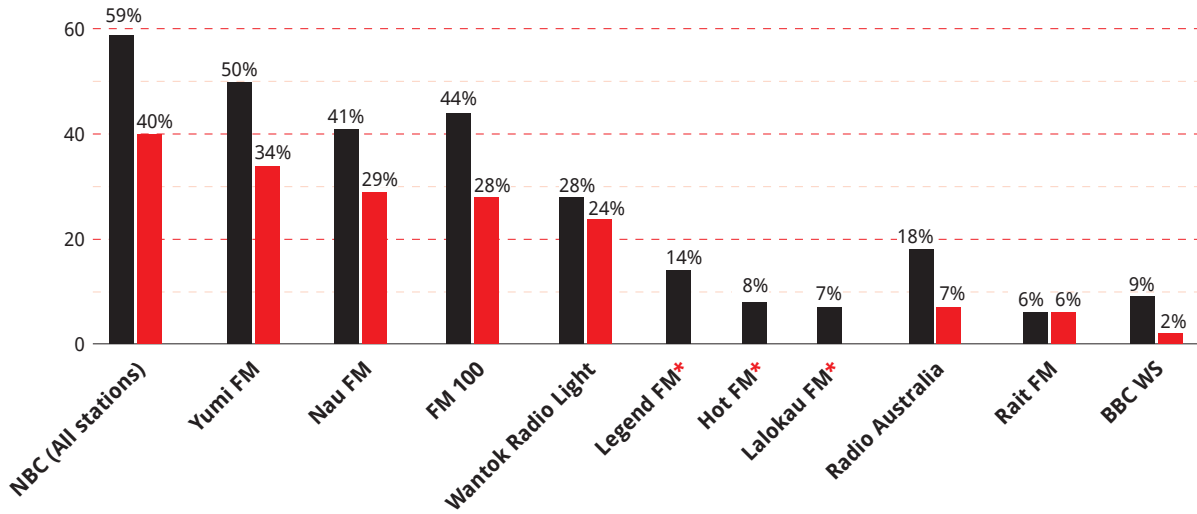
NBC STILL THE RADIO LEADER NATIONALLY, BUT LAGGING BEHIND COMPETITORS IN CENTRAL, MOROBE AND WESTERN HIGHLANDS

In line with general radio listenership, the weekly reach of all radio stations fell significantly over the last three years (see Figure 9). While NBC for now remains the leader among radio stations nationally,²⁹ it is losing ground in certain regions and provinces and has already fallen behind some of its competitors in Central, Morobe and Western Highlands, as Figure 10 illustrates. NBC's very low reach in Central is particularly problematic as it indicates that when listeners' media consumption is not limited by access issues, NBC becomes less appealing than some of its competitors. In Central, NBC lags behind its top competitors on the national level – Yumi FM, Nau FM and FM 100, but also reaches far fewer listeners than the newly established Lalokau FM, which broadcasts in Motu, and Wantok Radio Light, which prioritises faith-oriented programming. Further details on NBC's audience, its performance in individual provinces, and its strengths and weaknesses are included in Section 2.2.

28 n = 957 weekly radio listeners

29 Please note: the term "national" or "nationally" is used in reference to the eight provinces included in this study.

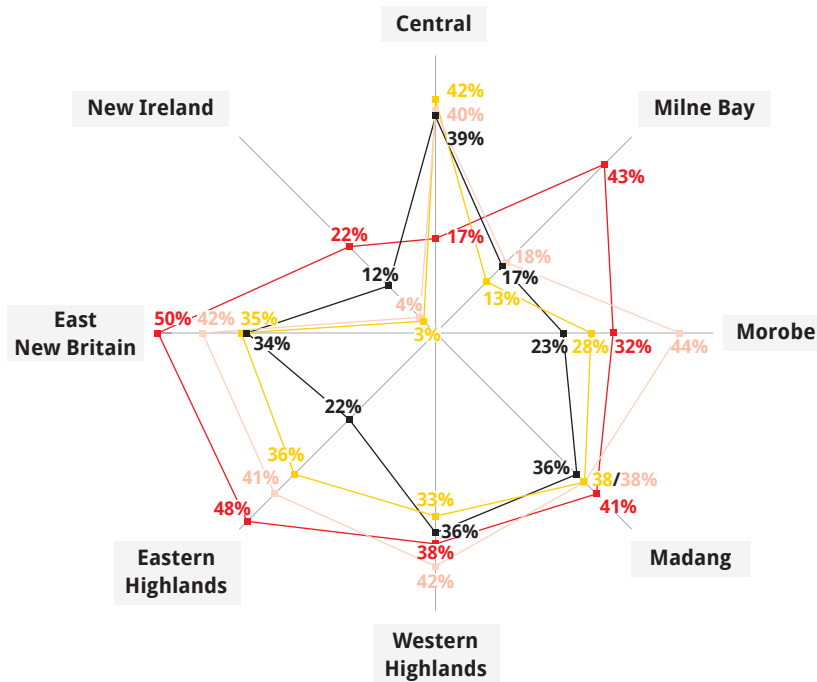
**Figure 9:
Weekly reach of radio stations**



2011/12
 2014
 * These stations were launched after the start of the 2011/2012 study and were not included in the 2011/2012 survey

Base:
 n = 1,308 respondents in 2011/2012
 n = 1,303 respondents in 2014

**Figure 10:
Weekly reach of top radio stations by province**

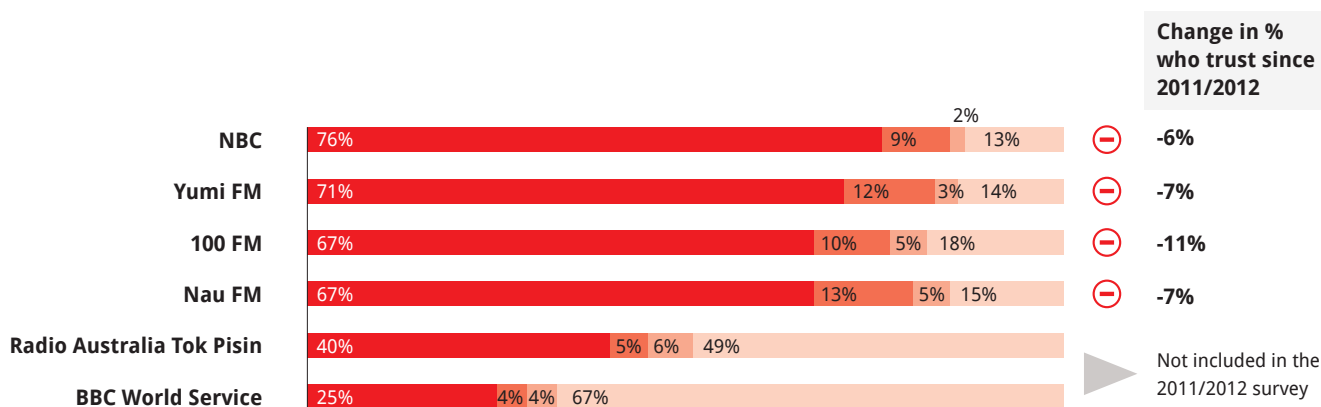


NBC
 Yumi FM
 Nau FM
 FM 100

Base:
 n = 1,308 respondents in 2011/12
 n = 1,303 respondents in 2014

| Trust in the leading radio stations continues to be high, although all stations experienced some drop in the share of weekly radio listeners who consider news and information provided as trustworthy (Figure 11). This is likely a reflection of the general drop in the perceived trustworthiness of the radio as a medium (discussed further in section 2.1.2.2.).

Figure 11:
Trust in radio stations



■ Trustworthy
 ■ Neither
 ■ Untrustworthy
 ■ DK/Refused

Base:
 n = 957 weekly radio listeners in 2011/2012
 n = 689 weekly radio listeners in 2014

REGULAR RADIO AUDIENCE WITH DIVERSE PROGRAMMING TASTES

The review of the most popular types of radio programming suggests that regular radio listeners in PNG have diverse content needs and that they are likely to tune in to radio stations to get access to more than one type of programming. As such, radio stations that are able to cater for various tastes rather than specialise only in one type of content are likely to attract the largest and most diverse audience in the long run.

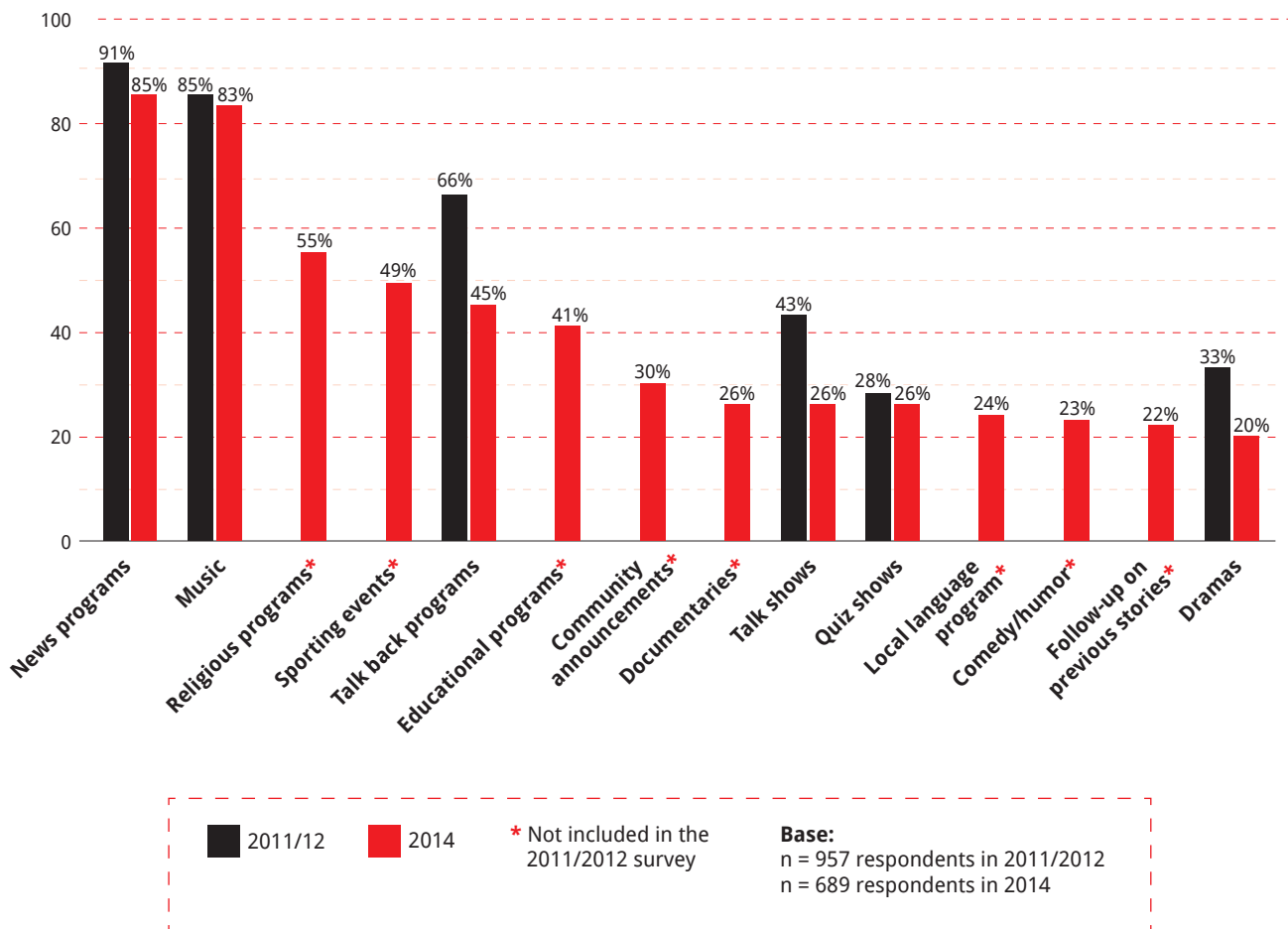
| Overall, news continues to rank as the preferred type of radio programming among regular radio listeners (Figure 12). However, interest in news from regular radio audiences has declined in the last three years, which also reflects in reduced listenership of news-oriented radio stations, such as NBC.

| The popularity of music, on the other hand, remains high and unchanged. Music content is of particular interest to young people and the findings of the citizen discussion groups show that many of the youth who have access to multiple radio stations, choose to listen solely to stations with a strong music component and focus on lighter (e.g. entertainment) and interactive (e.g. quizzes) content, rather than on news-heavy stations.

| *“Mostly I like to listen to music, and news once in a while.”*
 Mount Hagen, female regular listener, 18–24

| Music also plays an important role in radio listening for older audiences, many of whom prefer religious music. Unlike their younger counterparts, this group tends to switch between news-oriented radio stations (like NBC) and those who focus almost exclusively on music.

**Figure 12:
Popular types of radio programming**



| Listeners in the 2014 survey also expressed high interest in other types of radio programming that were not included in the 2011/12 survey, such as religious, educational and sports content. Religious programming is the most appreciated among those over 45, while interest in educational programming rises with age and listeners' education level. Sports event coverage is most popular among men and those over 45.

2.1.2.4. TV VIEWING HABITS

| Regular TV viewing across the country has not changed significantly since 2011/12. TV viewership in many areas remains limited by access issues, with over three quarters (78%) of those who do not watch TV³⁰ citing access as the main reason for not watching TV (77% in 2011/12³¹).

“Since I stay in the village I don’t know about EMTV. Sometimes I go to town and I see good programs on TV, like cooking and recipes, and things that help people learn and understand. We don’t have this service (TV) in the village, so it would be good if it came, because it would help people think [more] clearly, help them learn new things and develop good ideas and help us learn ways to make our place better.”

Morobe, male non-listener, 18-24

| That TV viewing continues to be strongly associated with household TV ownership is confirmed by the finding that among those who have a TV at home³², 75% watch it on a weekly basis, compared to only 21% who do not own a TV³³ and have to rely on communal viewing opportunities. While communal TV viewing has seen a decline over the past three years (Figure 13), it remains common particularly in the Highlands region. When compared with other provinces, a considerably greater share of regular viewers in the Highlands watch TV with others, either at their friend’s or relative’s house, in a communal village or town space, or at a trade store. For example, 85% of weekly TV viewers in Eastern Highlands and 63% in Western Highlands watch TV at a friend’s or family member’s house, compared to 56% or less in other provinces. Likewise, 48% in Eastern Highlands and 50% in Western Highlands watch TV in a public space, compared to only 27% or less in other provinces. 49% of regular viewers in Eastern Highlands and 51% in Western Highlands watch TV at a trade store, compared to 29% or less in other provinces.

| Other studies have also confirmed that public TV viewing is widespread in the Highlands region. For example, the 2012/2013 PACMAS study³⁴, which explored the role of the haus piksa phenomenon, showed that these village cinemas are common in the Highlands and often attract those who do not have access to TV at home. TV viewing in these public spaces primarily covers movies, music videos and sports programming, rather than news coverage. Haus piksa attendance is generally higher over the weekend.

30 n = 499 respondents who do not watch TV

31 n = 458 respondents who do not watch TV

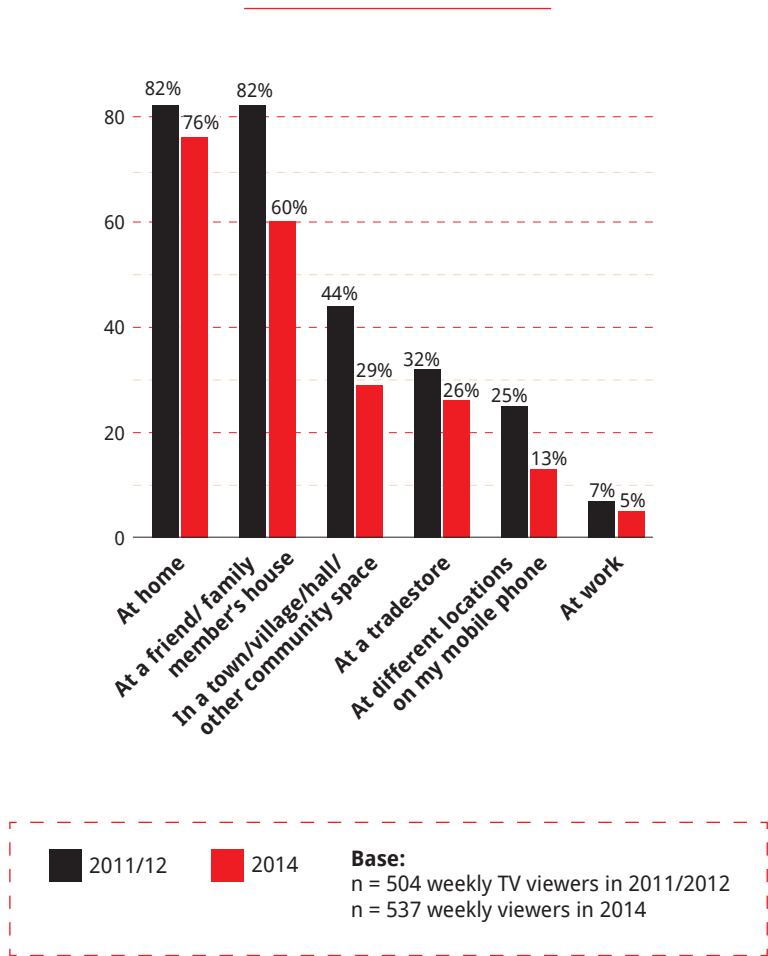
32 n = 499 respondents who do have a working TV in their household

33 n = 741 respondents who do not have a working TV in their household

34 PACMAS. (2012/13). CD Haus Distribution in the PNG Highlands Baseline Report. Retrieved November 9, 2014, from Pacific Media Assistance Scheme (PACMAS):

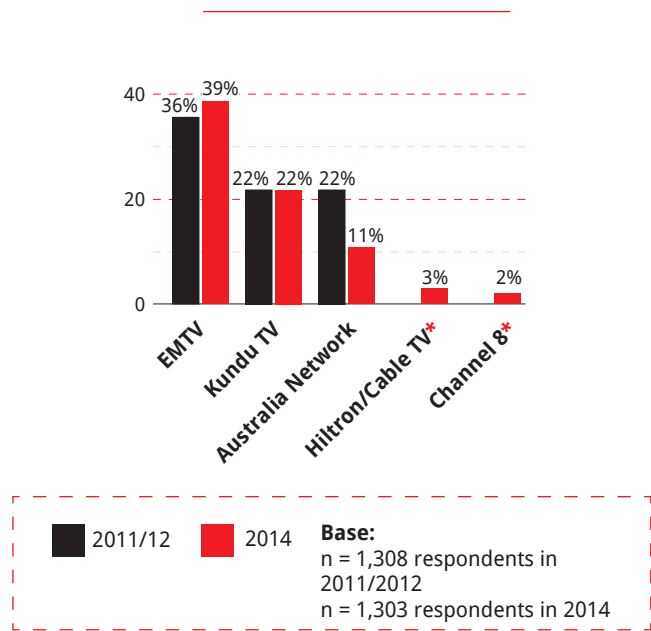
<http://www.pacmas.org/wp-content/uploads/2014/03/CD-Haus-Distribution-in-the-PNG-Highlands-Baseline-Report.pdf>

**Figure 13:
Locations of TV viewing**



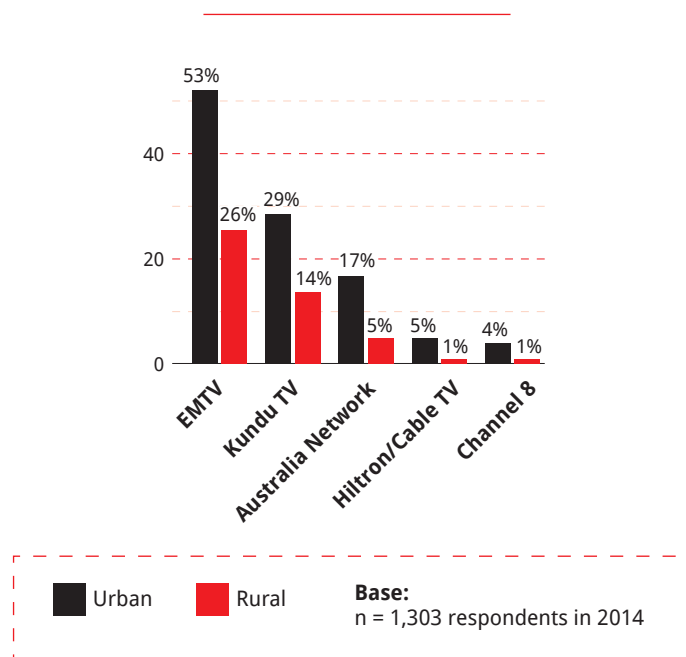
| EMTV and Kundu TV retained their audience³⁵ over the last three years (Figure 14), while Australia Network lost a significant share of their viewers, particularly in Eastern Highlands (its weekly reach dropped 36% compared to 2011/12) and Western Highlands (dropped 14%). As expected, all stations perform much better in urban centres where TV infrastructure is much better developed and more reliable than in rural areas (Figure 14A).

**Figure 14:
Weekly reach of TV stations**



35 The increase for EMTV from 36% to 39% is not statistically significant.

Figure 14A:
Weekly reach of TV stations in urban and rural areas



| For now, EMTV has kept the edge over other TV stations available in all PNG provinces, except New Ireland, where TV viewing is marginal. As the results from citizen discussion groups suggest, EMTV is generally the preferred source of both news and other content, primarily due to the diversity of its programming. Specifically, The Today Show, the 6pm news and the Music Zone were mentioned by several participants as programs they like on EMTV, while others said they watch the station for the educational programming and sports coverage.

“In the morning they (EMTV) put on the Today Show and then at midday they put on educational program and then the Kid’s Corner. After that [they broadcast] the national news and then finally at night other programs. So this makes it more interesting. And comparing it with Kundu 2, every morning they (Kundu TV) play those Pacific songs and they repeat the same songs every day, that’s why it is not interesting, because we don’t want to hear the same songs every day. Therefore we like the programs on EMTV, because they are interesting.”

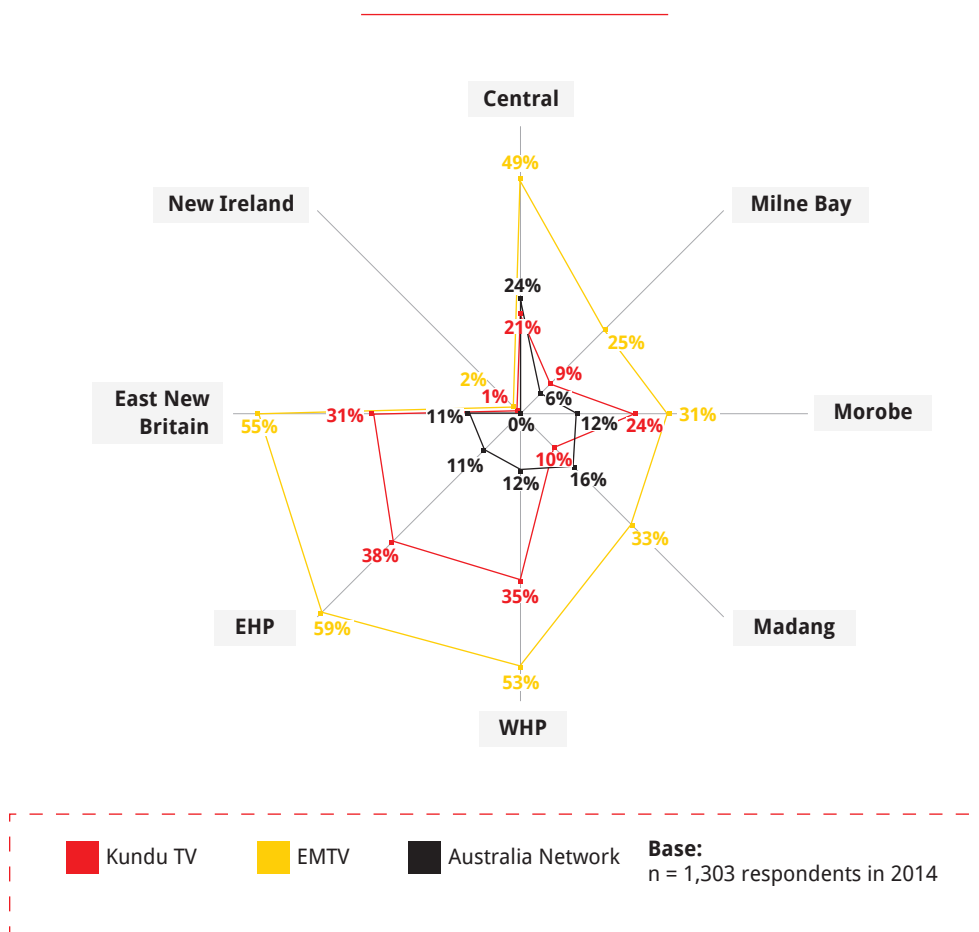
Mount Hagen, female regular listener, 18–24

“[I like Kundu TV] because they are simple and they sometimes talk about news that is local.”

Port Moresby, female non-regular listener, 18–24

| NBC's Kundu TV is PNG's second most watched station in most provinces, with the exception of Madang and Central, where Australia Network performs equally well (Central) or better (Madang) (Figure 15). Those who watch Kundu TV, tend to tune in for the 7pm news, Saturday children's programming and movies. A handful of participants also watch Australia Network or CNN, primarily for international news.

**Figure 15:
Reach of top TV stations by province**



| The competition in the TV market in PNG is about to increase further, with Digicel announcing that it is about to launch a new, national TV station. This could represent an important competition for EMTV and Kundu TV, as the dominant players in the PNG TV media space. The new station is to be unveiled in November 2014 and is reportedly designed to also cover remote rural areas of the country.³⁶

36 Kepson, P. (2014). *Mobile Phone Company Digicel Plans New PNG TV Station*. Retrieved November 9, 2014, from Pacific Islands Report: <http://pidp.eastwestcenter.org/pireport//2014/July/07-02-12.htm>

2.1.2.5. NEWSPAPER READING PATTERNS

| Access issues, illiteracy, difficulty understanding the content, lack of interest and cost remain central reasons for those who say they do not read newspapers. For example, the majority of those who live outside urban centres buy the newspaper only when they travel to town, when they have the money to do so, or rely on members of their family to bring it home when they return from work. As a result, sharing of newspapers continues to be common, as is passing on news from newspapers via word-of-mouth.

“Once in a while I go and buy Post Courier. Once in a while, when I’m doing nothing, I go to the town to buy the cooking oil for myself, soap for myself or whatever for myself, and when a K2.00 is left, I buy Post Courier [to read].”

Mount Hagen, female non-regular listener, 25+

“As for newspapers, when people go to Lae they buy a newspaper and read it and when they come [home] they tell us about things that happened or when there’s a problem that occurred, so we say okay, come and let me have a look.”

Morobe, female non-listener, 25+

“Every now and then when we come to town, that’s our chance to get the newspaper and find out about what’s going on in the country and outside. And after that we go to the village and tell everyone what’s going on in the country and give them the news.”

Port Moresby, male regular listener, 25+

| Post Courier and the National remain the two most popular newspapers, although Post Courier lost some ground against the National over the last three years (Figure 16). As several participants of the citizen discussion groups observed, the National seems to provide more diverse and detailed coverage of news and current affairs than the Post Courier, which might be one of the reasons for the increasing gap between the two newspapers.

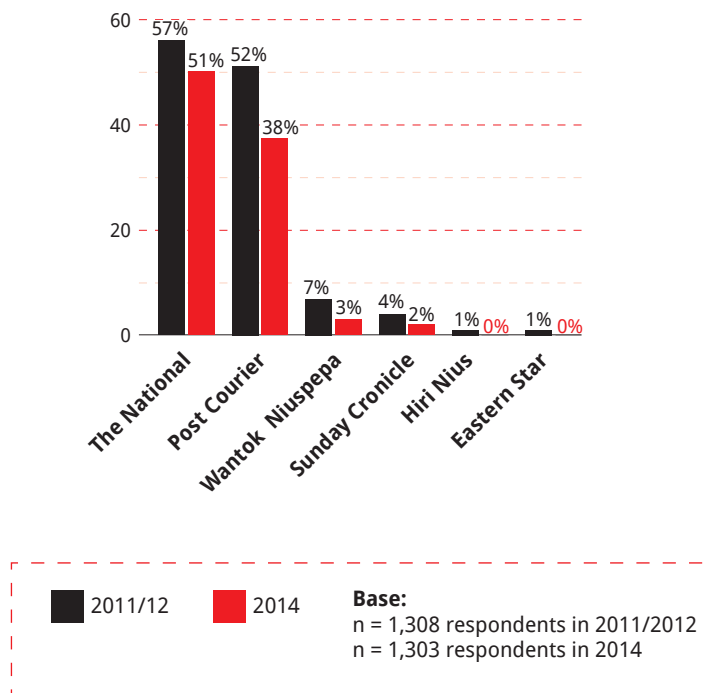
| Fewer readers now also read both newspapers (59% of weekly newspaper readers compared to 70% in 2011/12 study³⁷) due to cost reasons, as the insights from the citizen discussion groups suggest. This trend mainly benefited the National: three quarters (78%³⁸, 68% in 2011/12³⁹) of those who get their news from only one of the two newspapers opt for the National.

37 n = 862 weekly newspaper readers in 2011/12, n = 730 weekly newspaper readers in 2014

38 n = 277 newspaper readers who read only one of the two newspapers

39 n = 231 newspaper readers who read only one of the two newspapers

**Figure 16:
Weekly reach of newspapers**



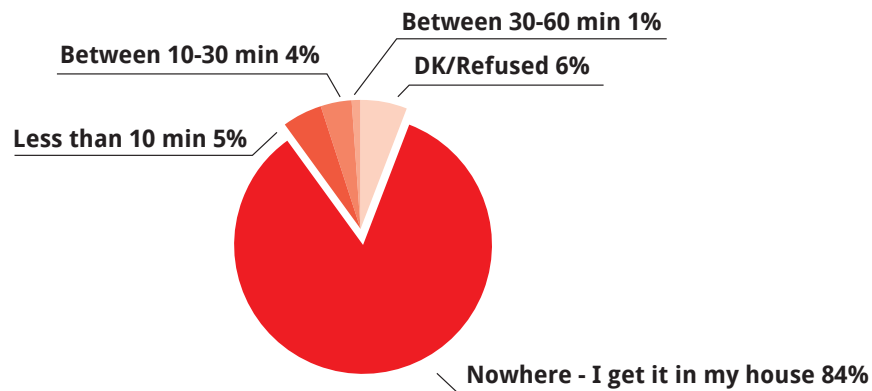
2.1.2.6. MOBILE USE HABITS

| Similar to the household ownership of mobiles, personal ownership also saw some decline, from 74% in 2011/12 to 64% in 2014, with Eastern Highlands and Morobe experiencing the most significant drop. Almost nine in ten of those who do not own a mobile borrow one from family members. As noted in the previous section, this decline in ownership may be, in part, associated with a weaker financial situation of certain segments of the PNG society.

| Lack of access also remains the main barrier for those who do not use a mobile phone (81%⁴⁰ cite this as the main reason), while signal remains the main challenge for one in ten. Even among those PNG citizens who do use a mobile phone, some have to travel relatively far to successfully connect to the mobile network (see Figure 17).

⁴⁰ n = 228 respondents who do not use a mobile phone

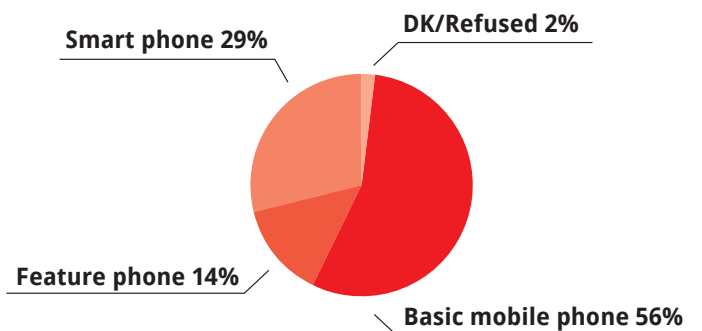
Figure 17:
How far do you need to travel to get a mobile signal?



Base:
 n = 843 mobile phone owners in 2014

Basic mobile phones that allow users to call and text but do not provide access to the internet or downloading of apps are still prevalent in PNG (see Figure 18). Smart phone ownership rises with education level and is considerably more prevalent among residents of urban areas and among the youngest mobile phone users – 41% of 15–24 year-olds who own a mobile phone⁴¹ have a smart phone, compared with 29% of all mobile owners in general. In line with global trends, it can be expected that smart phone ownership will continue to rise and eventually replace basic mobile phones and feature mobile phones,⁴² which are still used by about a tenth of all mobile phone owners in PNG.

Figure 18:
The type of mobile phone you own



Base:
 n = 843 mobile phone owners in 2014

⁴¹ n = 254 15–24 year-olds who own a mobile phone

⁴² These phones allow users to call, text and use some of the more advanced services, such as taking photos, but do not have internet access or the facility to download apps.

| Digicel continues to dominate the market, with more than nine in ten (95%) of all mobile phone owners using their network (Figure 19), while B Mobile and Citiphone capture only a minor share. A small proportion of mobile phone users (4%) also say they use more than one network.

| The type of activities that the mobile phone is used for remained broadly the same as three years ago (Figure 20). However, in line with broader radio trends, radio listenership on mobile phones saw a noticeable decline. These trends were common across the board and did not vary substantially between different target groups.

Figure 19:
Mobile networks used by mobile owners

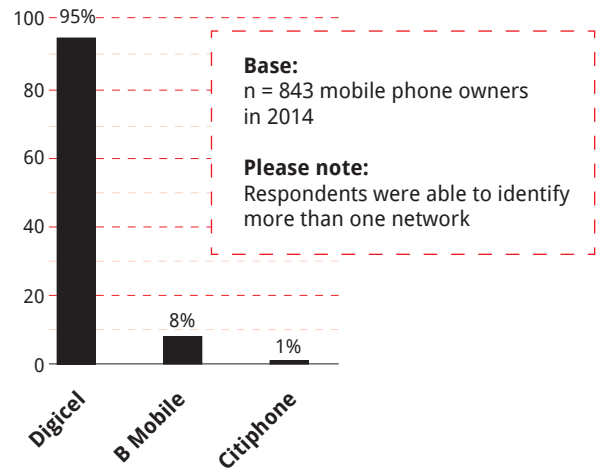
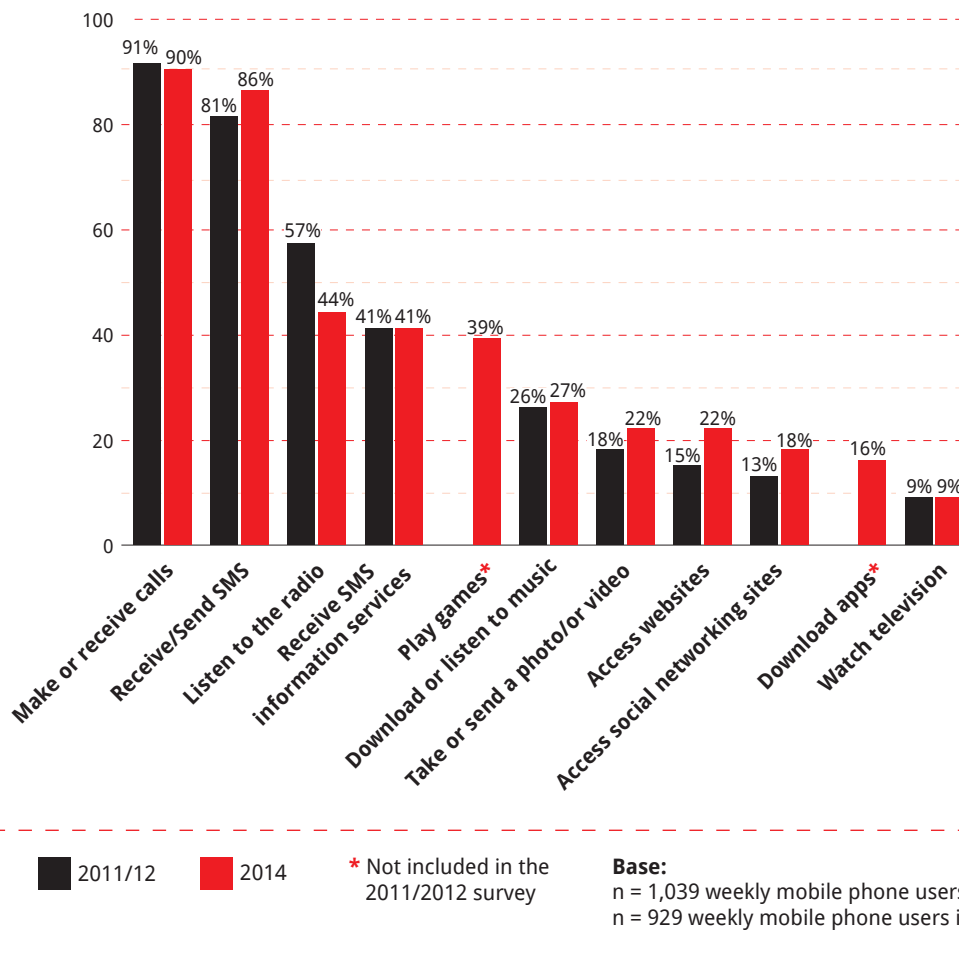


Figure 20:
Weekly use of mobile phone for different activities



| Furthermore, while the results of the survey indicate that the use of mobile phones to access the internet has not seen a statistically significant rise, the citizen discussion groups suggest that the use of internet among those who access it via mobile is diversifying. Both young as well as some older citizens across different provinces now use the internet to connect with their friends and family (via Facebook or email), stay up-to-date with news, research topics that are of interest to them, download or listen to music (on YouTube), download apps or complete school assignments.

| However, even now, the use of mobile internet remains constrained due to cost, with several participants noting that they access Facebook only when they have sufficient mobile credit.

“I’m on Facebook too [and] I can say I’m addicted to it. [I use it] every time before I [go to] sleep or in the morning. I have to look for some units so I that can log on to Facebook and chat with my friends and families on the other side of the world”.

Mount Hagen, female non-regular listener, 18–24

“I used to call my family at times and I used to play games [on my mobile phone]. If I want to check the internet, I will check if [I have sufficient mobile phone] credit.”

West New Britain, female non-regular listener, 18–24

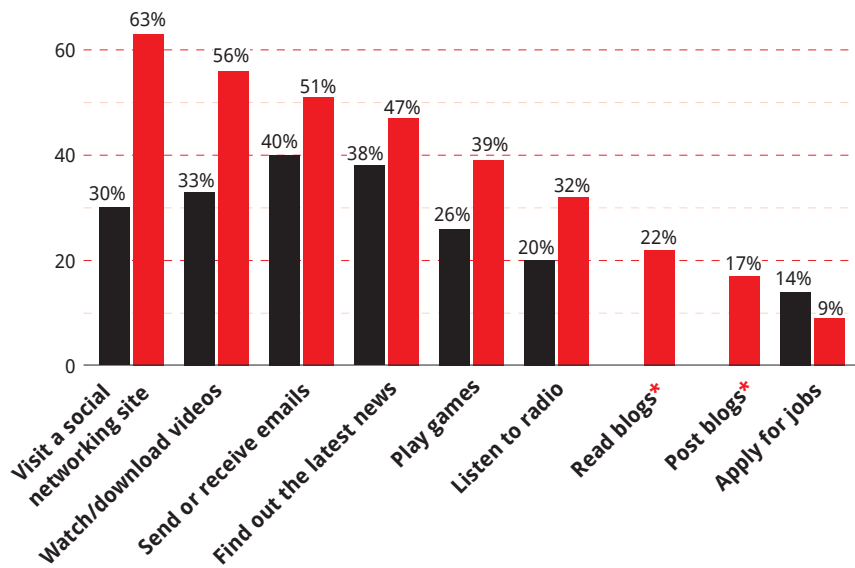
2.1.2.7. INTERNET USE HABITS

| Rapidly growing popularity of social media networking sites and a significant increase in watching and downloading online videos were the two key developments that have changed in the PNG internet space since 2011/12 (see Figure 21). Alongside Google, the world’s leading search engine, Facebook is now the most popular page among regular internet users⁴³ (Figure 22). Those who use it on a regular basis⁴⁴ are mostly male (60%), live in urban areas (74%), have at least secondary education (80%) and are between 15–24 years old (56%).

43 Please note: the difference between Google and Facebook is not statistically significant.

44 n = 181 respondents who use Facebook every day or a few times a week

Figure 21:
Weekly use of internet for different activities

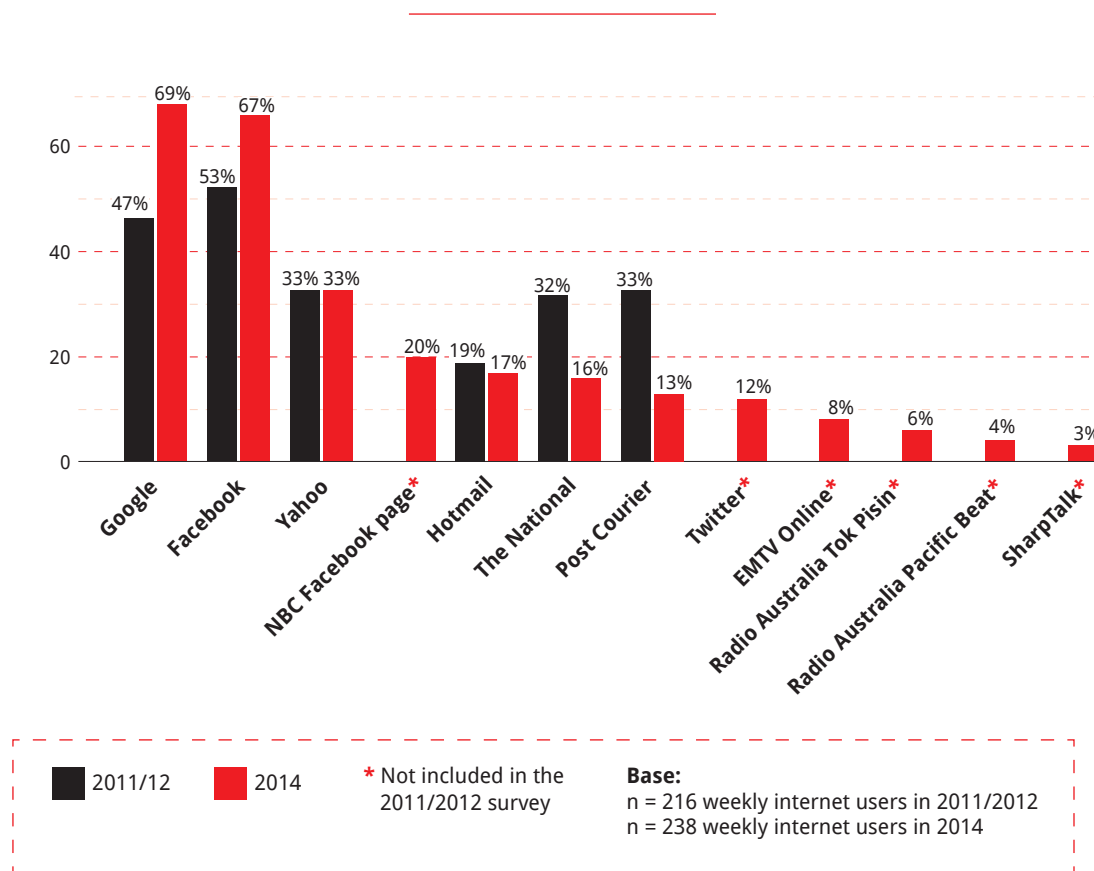


2011/12
 2014
 * Not included in the 2011/2012 survey
Base:
 n = 216 weekly internet users in 2011/2012
 n = 238 weekly internet users in 2014

| Those who use the internet on a weekly basis also tend to be more active online and are using the internet to engage in a greater number of diverse online activities than in 2011/12. On the other hand, the barriers for those who do not use the internet stayed broadly the same as in 2011/12: lack of knowledge of what the internet is, how to use it, and a lack of access.

| Internet users also continue to access the internet when they can and where they can, with most of them using several different locations to get online. However, as a result of growing household access to internet among regular internet users (80% of them now have it in their home compared to 69% in 2011/12), the use of internet at locations outside of their homes is slowly declining, while home use seems to be growing: 91% of all weekly users now use the internet at home, compared to 81% in 2011/12.

**Figure 22:
Weekly reach of websites**



2.1.3. PERCEPTIONS OF FREEDOM OF EXPRESSION

| In the latest Freedom of the Press Index 2013, a US-based NGO observed that, while the news media in PNG has traditionally been among the most independent in the region, press freedom in the country continues to deteriorate.⁴⁵ Although PNG is still considered “free” in terms of the status of the press, Freedom House noted that despite the pledges of PNG’s Prime Minister, Peter O’Neill, to protect and strengthen media freedom, the latter declined further in 2013. This manifested in various ways, including threats and harassment against journalists, designed to interfere with their work, with some conducted by the security forces with apparent impunity.⁴⁶ As a result, Freedom House lowered the country’s press freedom score for the fourth year in a row.

| These observations did not seem to reflect the public’s perception of media freedom and independence, which remains broadly unchanged since the 2011/12 study⁴⁷ (Figure 23). Two thirds of all who participated in the survey thus continue to believe that the PNG media are independent and able to report on any issue.

45 Freedom House. (2013). *Freedom of the Press – Papua New Guinea*. Retrieved November 9, 2014, from Freedom House: <https://freedomhouse.org/report/freedom-press/2013/papua-new-guinea#.VGxWiZOUe8D>

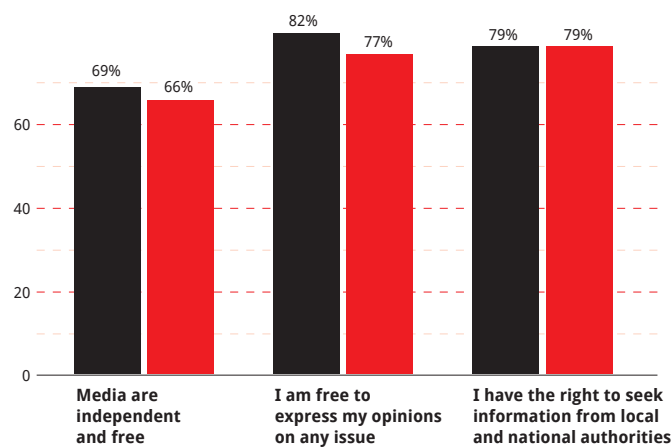
46 Ibid.

47 The change from 69% to 66% is not statistically significant.

| Similarly, the large majority of PNG citizens continue to feel free to voice their opinions, regardless of the issue. However, the share of those who agree with this statement reduced slightly since 2011/12.

| Finally, while there is no information law in PNG, the vast majority of its citizens believe they have the right to request information from the authorities, both on a local and national level.

Figure 23:
Freedom of expression and the right to seek information (% who agree)



■ 2011/12 ■ 2014

Base:
n = 1,308 respondents in 2011/2012
n = 1,303 respondents in 2014

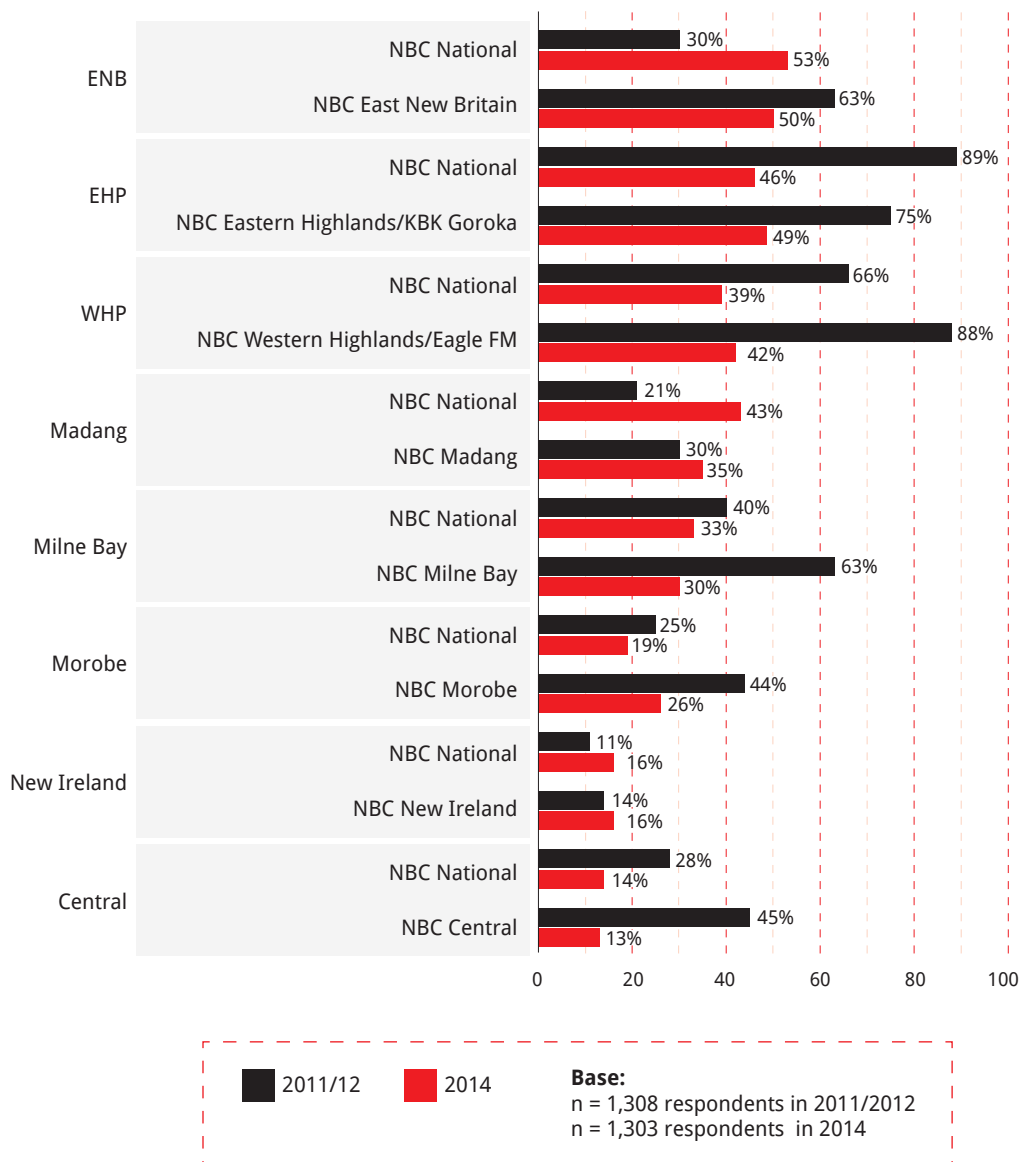
2.2. NBC Platforms, Programs, and Audience

2.2.1. NBC RADIO

DETERIORATING RADIO SIGNAL, FALL IN GENERAL RADIO LISTENERSHIP AND GROWING COMPETITION LEADS TO LOWER NBC LISTENERSHIP

Over the last three years, NBC lost a significant portion of their listenership across all provinces included in this survey, with the exception of Madang and New Ireland (Figure 24). This is likely the result of a combination of factors, including a fall in general radio listenership discussed earlier in this report, deteriorating NBC signal in some provinces and the emergence of new and popular competitors, such as Lalokau FM in Central.

Figure 24:
Weekly reach of NBC radio stations



| While the **general fall in radio listenership** can be considered one of the causes for the fall in NBC's weekly audience, it is important to note that not all radio stations were affected by this trend in the same way. In Milne Bay, both Yumi FM and Nau FM managed to keep their weekly listenership on the same level as in 2011/12 (at 18% and 14%, respectively⁴⁸), while NBC's weekly audience in the province fell from 66% in 2011/12 to 43% in 2014. Similarly, in Morobe, Yumi FM saw no change in their weekly listenership, while all other top stations have lost significant ground since 2011/12 (NBC's weekly audience fell from 49% in 2011/12⁴⁹ to 32% in 2014⁵⁰). Two possible reasons for these differences may be a worsening NBC signal, (discussed in more detail below) and more popular music and non-news programming offered by competitor stations.

| NBC remains the preferred provider of news with 43% of regular listeners⁵¹ citing it as their preferred source, compared to 25% for Yumi FM and 12% for Nau FM. Insights from the citizen discussion groups, however, show that those who listen to the radio for music and lighter content generally prefer NBC's main competitors. As such, NBC risks losing more listeners to other stations in the near future, particularly among the younger generation, unless its music selection and lighter content improves considerably.

| **Poor radio signal** was identified as one of the main barriers to NBC listenership in the 2011/12 survey. Three years later, this challenge appears to have either stayed the same, or worsened in some areas.

| At present, the vast majority of NBC's weekly audience (94%⁵²) listens to radio on FM frequency, 3% listen on medium wave and 3% on short wave. However, listeners who participated in the citizen discussion groups in West New Britain⁵³ and in Morobe all complained about poor NBC radio signals. They reported that in West New Britain the signal tends to be weak and sporadic, with one participant commenting that NBC has the worst reception among all radio stations available in the area. In Morobe, listeners reported that they are unable to listen to NBC at all, due to lack of signal. As such, several participants listen to NBC Morobe (as well as other stations) only when they travel to Lae, where the signal tends to be somewhat stronger. Others simply stopped listening to the radio and instead now turn to print media to stay up to date with news and current affairs.

“For us here, I don't know why it is not clear. When we put [NBC West New Britain] on, strange noises happen, like whistling sound, so we can't hear anything from this station.”

West New Britain, female regular listener, 25+

48 n = 156 respondents in Milne Bay

49 n = 161 respondents in Morobe

50 n = 154 respondents in Morobe

51 n = 689 weekly radio listeners

52 n = 460 NBC weekly radio listeners who provided an answer to this question

53 West New Britain was not included in the quantitative survey, only citizen discussion groups were conducted in this province.

“Before we used to get good coverage, but now we don’t. When you turn it on, the radio will give the sound ‘ssssssss’ and then it will cut off. Sometimes it will remain like that and then the boys turn to boombox, flash drive and whatever – those only and [not to] FM radio, Radio Morobe or anything of that kind.”

Morobe, female non-listener, 25+

| However, despite the NBC signal being the weakest in rural areas in outer provinces, even in Port Moresby some listeners consider NBC’s reception poor:

“The only thing that I like about the NBC is the news, apart from the quality of the broadcast. [The signal] is not that clear.”

Port Moresby, female regular listener, 18–24

“As for me, it comes on until 12 o’clock or 10 o’clock and then it goes off, Radio West New Britain. It is not like 93 FM (Yumi FM) that stays on from 6am to 6pm.”

West New Britain, female regular listener, 25+

“Before we used to listen to NBC Morobe, but now we don’t listen to it. Just Radio Australia, that’s what we hear.”

Morobe, male non-listener, 18–24

| According to NBC, this worsening signal can be, in part, contributed to aging short-wave transmitters and their frequent breakdowns, which has crippled their ability to provide radio signals to rural and remote areas. For example, Central, Eastern Highlands, Western Highlands, Morobe and East New Britain at present have no SW transmitters, due to breakdowns.⁵⁴ In addition, many portable short-wave radio sets that are currently sold in PNG have a frequency range that can only identify Asian stations, but do not carry NBC signals. NBC radio signal is likely to have worsened due to more frequent power outages in the last few years, which significantly affects NBC broadcasts on FM frequencies. As noted by NBC, their provincial stations have no alternative source of electricity supply and are forced off-air during commercial power failures. NBC Central, for example, was off-air much of the last quarter of 2013 because of generator failure, air conditioning and related issues.

54 M. Samuga, NBC Executive Director of Provincial Radio (personal communication, October 7, 2014).

| These significant signal difficulties represent a challenge to NBC, not only in terms of their negative impact on NBC’s ability to expand its listenership in these provinces, but also in terms of the significant risk of losing previously loyal listeners either to other radio stations with better reception or to other media types that are more easily accessible in their area.

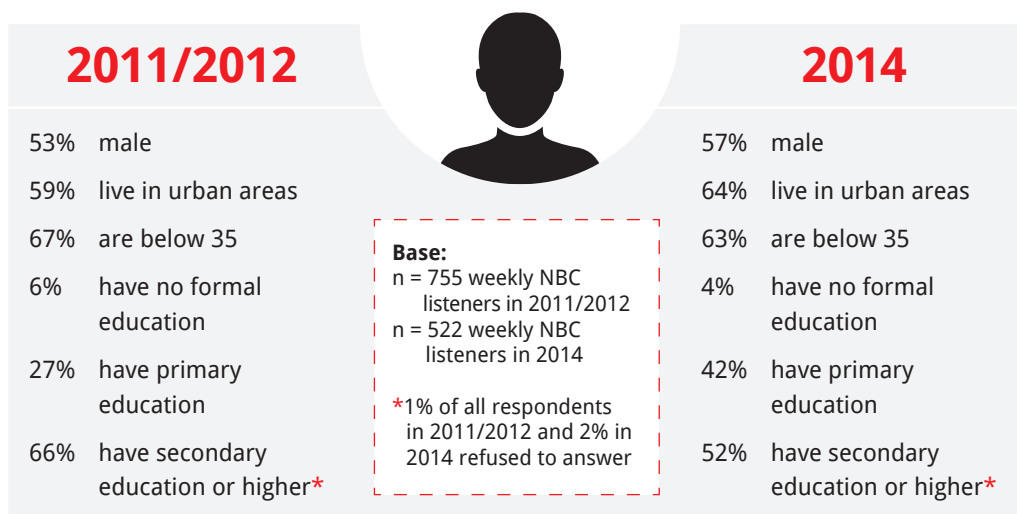
| Lastly, NBC’s leadership in the PNG radio market is being threatened by **growing competition** from new radio stations that tailor their offering to a specific target audience. Lalokau FM in Central, for example, managed to attract a significant radio audience since its establishment in 2013. In the latest survey their weekly reach in Central was recorded at 49%,⁵⁵ almost three times NBC’s weekly radio listenership,⁵⁶ which stood at 17%. Among Motu-speaking residents of Central, which represent Lalokau FM’s primary target audience, its weekly reach is even higher – 80%⁵⁷, compared to NBC’s 31%. In 2011/12 NBC’s reach in Central was recorded at 50%⁵⁸ overall and at 52%⁵⁹ among the Motu-speaking community.

NBC AUDIENCE REMAINS MAINLY URBAN AND BETTER EDUCATED

The overall profile of NBC weekly listeners in 2014 remains broadly the same as in 2011/12, i.e. primarily urban and better educated. However, the 2014 survey also shows that in the last three years NBC lost listeners particularly in rural areas, likely on the account of poorer signal in these parts of the country, and among those with secondary education or higher. The latter may be, in part, a result of the preference of better-educated citizens for newer sources of information, such as television and particularly the internet. Consequently, NBC weekly audience is now even more concentrated in urban areas than in 2011/12, less educated than three years ago and also slightly more skewed towards men.

| To ensure that this trend of declining audience among these segments of the population does not continue, it is essential to address the deteriorating signal and ensure that NBC’s content caters for diverse, sophisticated and well-informed media consumers.

Profile of NBC weekly listeners



55 n = 177 respondents in the Central

56 Please note: NBC Central was off air much of the last quarter of 2013 due to the generator, air conditioning and related issues.

57 n = 63 respondents in Central whose primary language is Motu

58 n = 182 respondents in Central

59 n = 66 respondents in Central whose primary language is Motu

NEWS REMAINS NBC'S KEY STRENGTH

Despite the considerable reduction in the size of its weekly audience, the listeners' overall perceptions of the national broadcaster have not changed much since 2011/12.

| As in 2011/12, **news** remains the defining and most recognisable feature of NBC radio programming (Figures 25 and 26). For many, the broadcaster remains the primary provider of news on developments in their country and internationally. Its coverage on current affairs is viewed as detailed, trustworthy and reliable, and many are pleased with the diversity of topics that are covered in NBC broadcasts, including national and provincial news and current affairs, politics and other issues.

“Well, this is what I say to all my friends: you have to tune in to NBC because they broadcast the updated news.”

Port Moresby, female regular listener, 18–24

“They are very trustworthy, and all the senior announcers, they are very educated when they are in front of the microphone. So yeah, NBC is a trustworthy radio station.”

Port Moresby, male regular listener, 25+

“Eagle FM [NBC Western Highlands] informs us what will happen tomorrow and what had happened in and around Western Highlands. That’s why I like to listen to Radio Eagle FM (NBC Western Highlands).”

Mount Hagen, female regular listener, 25+

“The other [radio stations] [broadcast general information] and never go into detail, but NBC [broadcasts] the details on what is happening in the province and in the country. They give the exact [information], so NBC is better than the other stations.”

Mount Hagen, male regular listener, 18–24

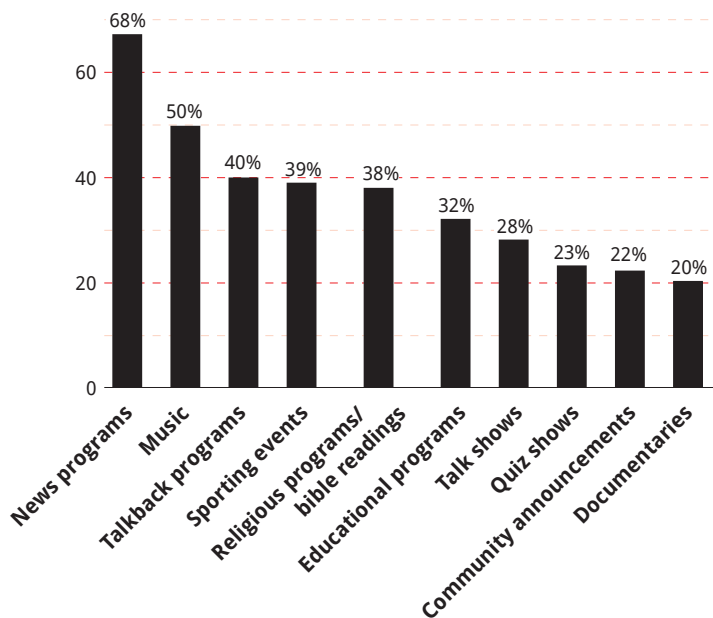
| However, the results of the citizen discussion groups also suggest that these favourable sentiments are stronger among older listeners and those with limited access to other media sources. While listeners who live in more diverse media environments (e.g. in Port Moresby) also value NBC for their quality news coverage, some of them prefer other sources – particularly TV (EMTV) or newspapers – as their news providers, or combine listening to news on NBC with listening to other stations for lighter content and music.

“When I go to sleep, I leave my small radio on. It’s just beside my ear and when I go to sleep I sometimes listen [and] sometimes I forget all about [it]. In the morning I tune in again and when there’s too much music on Lalokau FM, I tune into NBC [Central] because I want to listen to news. Currently my favourite is TV – current affairs, 60 Minutes program and other Saturday news. When I didn’t have a TV – I think it’s two months now – I’ve been tuning into NBC to listen to news.”

Port Moresby, female regular listener, 25+

| This trend towards listening to a range of stations rather than only NBC may also account for some of the drop in listenership of most programs since the 2011/12 study (Figure 26). NBC’s News program, for example, lost the most regular listeners among the better educated; those with secondary or higher education now represent only 51% of all NBC News’ weekly audience,⁶⁰ compared to 66%⁶¹ in 2011/12.

**Figure 25:
Most popular types of programming on NBC**



Base:
n = 522 NBC weekly listeners in 2014

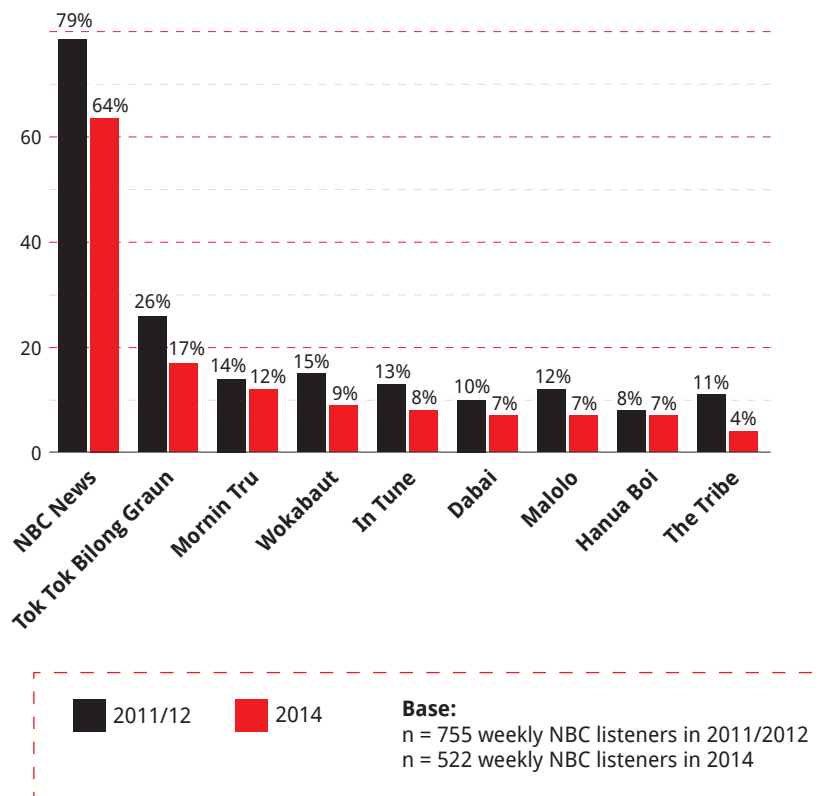
60 n = 358 respondents who listen to NBC News on a weekly basis

61 n = 606 respondents who listen to NBC News on a weekly basis

| Music also remains a popular type of programming among NBC weekly audience, although it is important to note that this aspect is also considered one of the weakest elements of NBC’s offering, compared to other competitor radio stations (see section 2.1.2. for further details).

| Talkback programs that allow listeners to more actively engage with the content and provide their views on different subjects remains high on the list of popular programming. Participants in the citizen discussion groups expressed their appreciation for this type of program, particularly for NBC’s talkback shows on social issues, such as domestic violence, environment and family planning, which they found educational. This high interest also reflects in a substantial share of listeners who participated in such shows in the past, with about a third (30%) of those who listened to talkback⁶² saying they have called into a show before. Younger listeners are the most likely to participate in such shows (42% of those who had called in before⁶³ were 15–24 and 30% were 25–34), as are men (61% of callers were male) and residents of urban areas (63%).

Figure 26:
Weekly audience of individual NBC programs



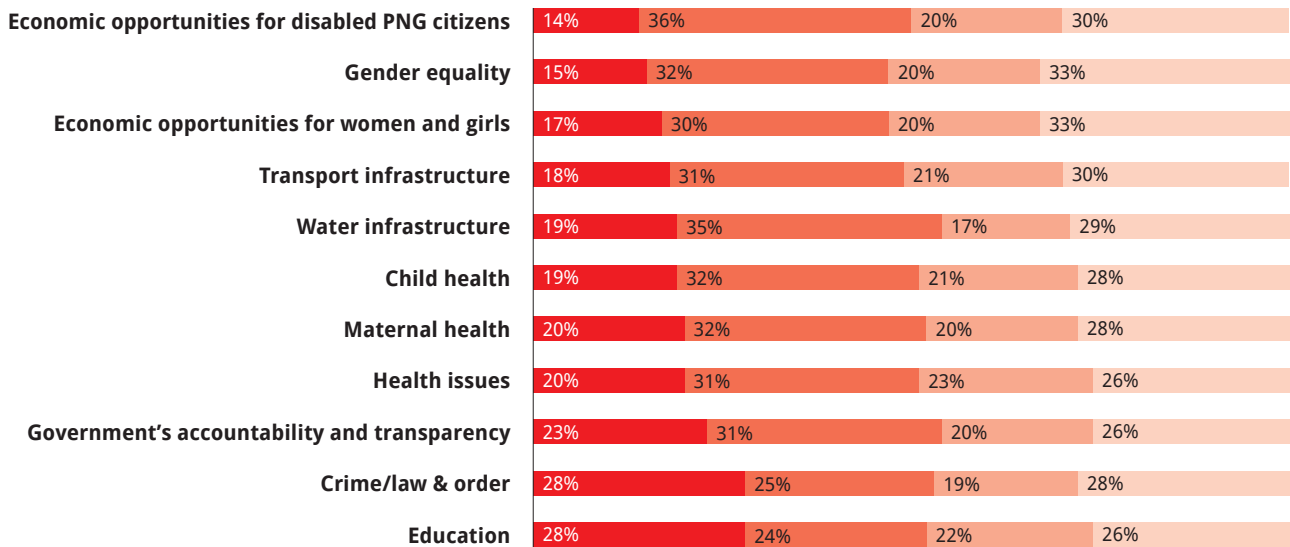
62 n = 303 NBC regular listeners who have listened to an NBC talkback program before

63 n = 106

VARYING INFORMATION NEEDS OF NBC AUDIENCE ACROSS DIFFERENT PROVINCES

In terms of individual issues that NBC covers in their programming, none of them seem to be perceived as overall particularly over-reported or underreported (Figure 27).

Figure 27:
Amount of information NBC provides on individual issues



Too much
 Too little
 The right amount
 DK/Ref

Base:
n = 522 NBC weekly listeners in 2014

| These perceptions, however, differ significantly between provinces. In Eastern Highlands, for example, the NBC weekly audience is particularly eager for more information on health issues, including general health and maternal and child health. In Milne Bay, NBC weekly listeners believe that the station should dedicate more airtime to water infrastructure issues, while those in Central, Morobe and Madang feel that the reporting on economic opportunities for disabled citizens should be increased (see Figure 27A).

**Figure 27A:
Share of NBC weekly listeners by province who believe that NBC
currently provides insufficient information on specific issues**

	Central	Milne Bay	Morobe	Madang	WHP	EHP	ENB	New Ireland
Education	21%	22%	32%	30%	24%	31%	14%	19%
Crime/law & order	29%	26%	29%	24%	22%	36%	15%	19%
Government's accountability and transparency	30%	27%	43%	30%	37%	38%	16%	28%
Health issues	23%	35%	40%	23%	38%	48%	12%	18%
Maternal health	37%	36%	40%	25%	35%	48%	13%	22%
Child health	42%	36%	44%	25%	30%	46%	14%	24%
Water infrastructure	45%	50%	39%	30%	40%	39%	14%	27%
Transport infrastructure	38%	34%	36%	26%	34%	39%	19%	24%
Economic opportunities for women and girls	32%	34%	41%	26%	38%	32%	17%	31%
Gender equality	31%	31%	40%	22%	37%	44%	17%	29%
Economic opportunities for disabled PNG citizens	58%	45%	48%	38%	32%	37%	19%	30%
Base (weekly NBC listeners)	n = 30	n = 67	n = 50	n = 57	n = 81	n = 104	n = 96	n = 36

| These findings are also in line with the results of the 2011/12 survey, which indicate that the information needs of citizens across different regions and provinces vary significantly. This suggests that the programming of provincial NBC stations needs to be tailored to respond to these diverse requirements of regional/provincial audience segments.

| Lastly, it is also important to note that women's and men's perspectives on how much airtime NBC should be dedicating to these issues differ. Women believe that NBC should increase its focus on gender equality (41%⁶⁴ compared to 29% of men⁶⁵) and accountability and transparency of PNG government (39% of women, 31% of men), while men tend to feel that NBC presently dedicates too much time to both of these issues.

MUSIC AND ENTERTAINMENT CONTENT SHOWING MOST ROOM FOR IMPROVEMENT

Although music remains one of the most popular types of NBC programming among its regular listeners, insights from the citizen discussion groups indicate that, compared to competitor radio stations, music and entertainment content continue to be the weakest components of NBC's radio offering.

64 n = 281 respondents

65 n = 338 respondents

| This view is particularly prevalent among the younger audience (15–24 year-olds), however, even some of the older listeners noted that NBC needs to improve its music selection to successfully compete with other radio stations. Religious songs and “golden-oldies” tend to be a common preference among older listeners, whereas the younger generation prefers modern music and lighter content (jokes, promotions, quizzes etc.).

“[I listen to] Lalokau FM, Nau FM and Yumi FM. [I like] the style of music that they’re playing [on] Yumi FM [and Nau FM]. [If] I want to listen to news I tune back to Lalokau FM.”

Port Moresby, male regular listener, 18–24

“I would trust NBC [and] the information they are giving out. They’ve been there for a long time and there’s a lot of new [radio stations] but when it comes to news, everyone goes to NBC. Nau FM doesn’t have their reporters going out, NBC does. I’m sure if anything happens, everybody will want to listen to NBC. If they like music they’ll tune in to the other stations.”

Port Moresby, male regular listener, 25+

| These ongoing shortcomings present a significant challenge for NBC, particularly in terms of attracting a younger generation of listeners who are less interested in news and consider music as one of the main reasons for radio listening. Currently, their dissatisfaction with NBC’s music offering drives many of these listeners to competitor radio stations such as Yumi FM and Nau FM.

| Lack of progress in this area also poses additional risk for NBC, particularly if other radio stations decide to further develop their news coverage. For example, a few discussion group participants already mentioned Yumi FM and Lalokau FM as their occasional source of news. In addition, Lalokau FM also broadcasts in Motu, which appeals to the large Motu-speaking community in Central.

NBC’S PRESENTATION FORMAT AND STYLE NEEDS UPDATING TO COMPETE WITH OTHER STATIONS

Presentation style is another element of NBC programming that seems not to have changed considerably since 2011/12, which has attracted criticism from both regular and non-regular listeners. As in the 2011/12 study, many of those who participated in the citizen discussion groups noted that NBC’s presenters and their presentation style lag behind other commercial radio stations. Younger listeners, in particular, believe that NBC’s presenters are considerably less dynamic than those they hear on competitor stations such as Yumi FM and Nau FM. This further discourages their listening to NBC and drives them to other radio stations.

“The way they present the programs, there’s not much life in their voices, it’s more or less just straight through read of the script and that’s it.”

Port Moresby, female regular listener, 18–24

“I like their (NBC) news, [which] is detailed compared to other stations, but the music and the announcers – I don’t like how they present, they are slow and boring. They have to, like, you know, [be] like Nau FM people, they are ‘psyched up’, make people want to listen to them.”

Port Moresby, female non-regular listener, 18–24

“The announcers should be replaced, since most of them are old and keep on repeating same things every day. They should replace them with some announcers that will make jokes for a few minutes and then continue to talk again, like other radio stations do, therefore it will make it interesting and more people will like tuning into NBC and listening to it.”

Mount Hagen, female regular listener, 18–24

“The programs on this radio station (NBC) need to be fixed. Add in some interesting things that will interest the radio listeners and they [also] need to change some workers. Get new graduates, who have the latest knowledge and remove the old ones.”

West New Britain, female regular listener, 25+

| Some listeners also complain about the language used by NBC presenters and note that their pronunciation is often poor and news reading is not always fluent. In addition, some are bothered by their mixing of English and Tok Pisin and believe that presenters should use one or the other language, rather than switch between the two during the program.

“Better presentation by announcers [is needed]. Some – I’ll be very frank and honest here – especially the new ones, the younger ones, they cannot pronounce some simple English words properly. I don’t know whether we should blame them or how they were educated, but that’s the quality of their presenters.”

Port Moresby, male regular listener, 25+

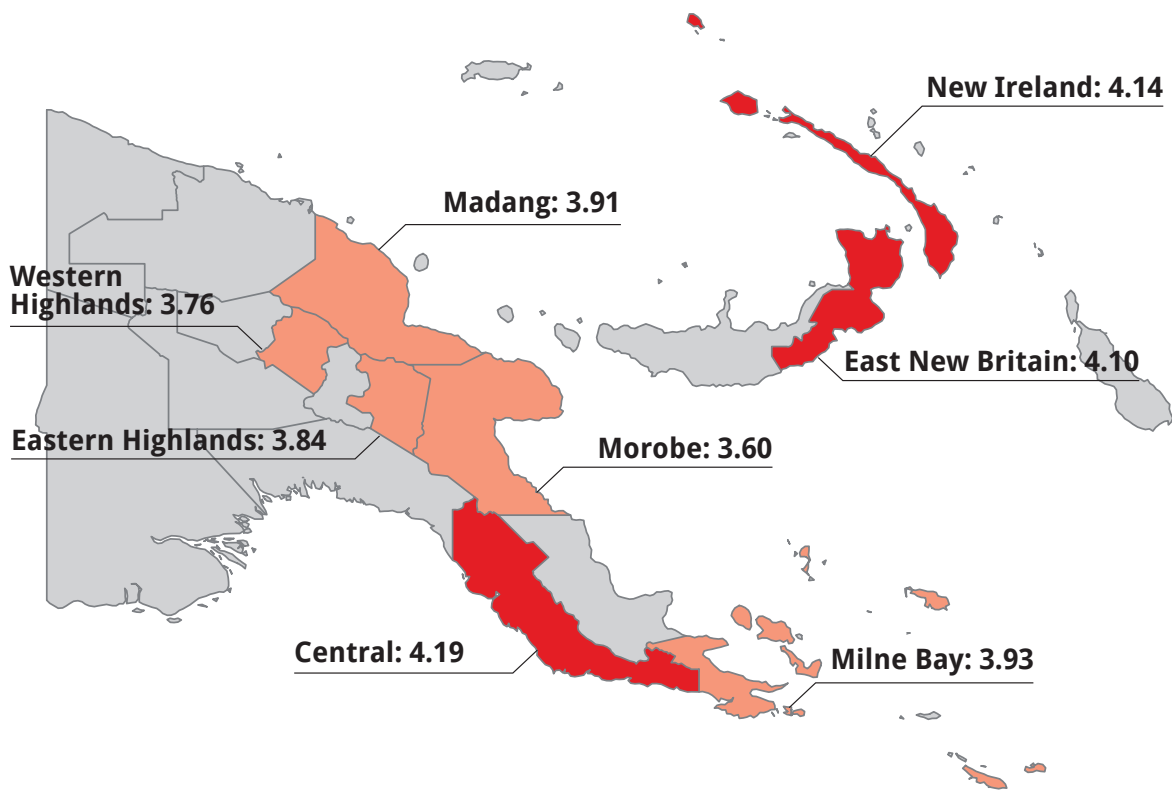
| Lastly, some participants of the citizen discussion groups also called for more interactive programming. Several commented that NBC puts too much focus on one-way communication with the audience (long segments of presenter monologues and dialogues with the guests) and lacks programming that engages listeners. While some mentioned talkback as the type of interactive program they enjoy, the audience is calling for greater interactivity to be incorporated into other NBC programs as well, or for the creation of new programs that would afford listeners more opportunities for active engagement.

NBC'S BRAND OVERALL THE STRONGEST AMONG ITS AUDIENCE IN CENTRAL AND NEW IRELAND

In addition to exploring NBC listeners' perception of the NBC brand in the citizen groups discussions, survey respondents were asked to evaluate NBC on 12 different brand attributes, including the accuracy of its news, the change in the quality of its signal, independence, likeability of its presenters and other features (see Figure 29 for the full list). Based on the attitudes of NBC listeners towards these aspects of the NBC brand, an **NBC Brand Perception Index** was constructed. The Index is designed to provide insight into how the brand is perceived among different audience segments and across different provinces.

| The Index shows that NBC's brand tends to be perceived most positively in provinces where its regular audience is the lowest, i.e. Central and New Ireland, and where NBC managed to retain a small, but highly loyal segment of radio listenership, despite the challenges discussed in the previous sections (Figure 28).

**Figure 28:
NBC Brand Perception Index by province**



NBC Brand Percetion Index:

The NBC Brand Perception Index has a range of 1-5 indicating appeal of the NBC radio brand. The higher the score, the more positive the attitude is towards a particular aspect of the NBC brand or the brand overall.

Please note that the survey respondents only evaluated the NBC brand across these attributes if they had listened to any NBC radio station either yesterday, in the last seven days (heavy NBC listeners) or in the last four weeks (medium NBC listeners).

Index Score: 1-5

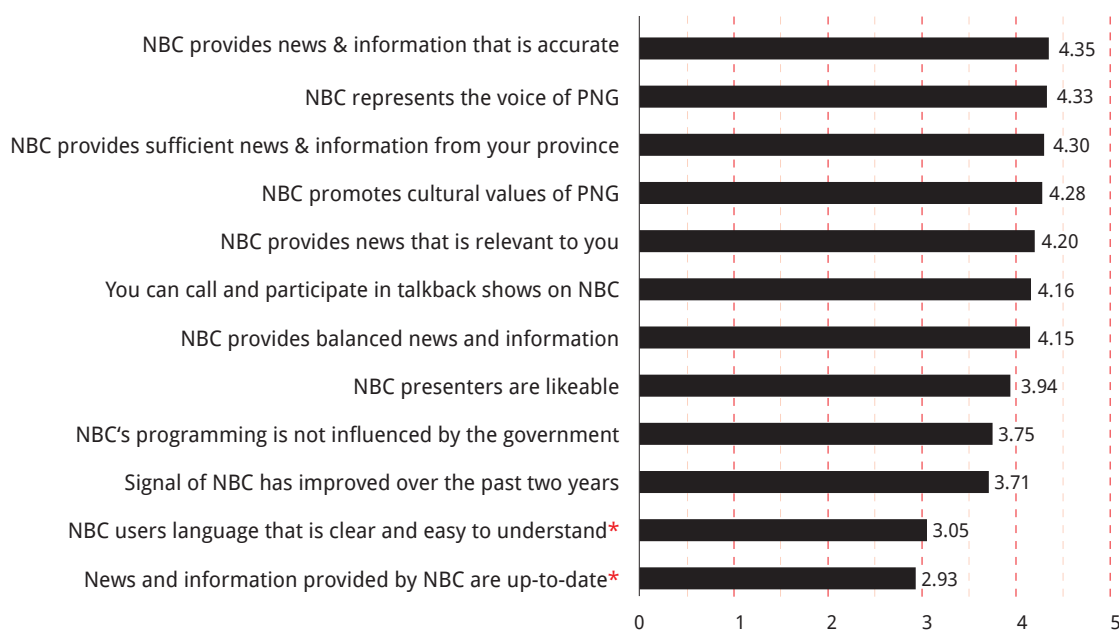
- 1.00-3.00 Negative brand perception
- 3.01-4.00 Moderately positive brand perception
- 4.01-5.00 Highly positive brand perception

Unsurprisingly, the overall positive sentiment towards the NBC brand is also the strongest among the heaviest listeners, i.e. those who listen to it either every day or at least once a week and tend to be the most familiar with its content and programming (overall score of 3.98, compared to medium listeners with an overall score of 3.57).

In terms of individual aspects of NBC's brand, the accuracy of its news and information and its ability to act as the voice of all PNG citizens continued to be perceived as key strengths (Figure 29). The station is also highly valued for its local coverage on provincial developments. This was an issue the 2011/12 survey respondents also highlighted as of high interest to them.

| Similarly, the areas of weakness identified in 2011/12, three years down the line also seem to have stayed the same. As noted in the previous sections, the language used by its presenters continues to be considered unclear and hard to understand by many listeners, reception issues remain a challenge and a significant segment of NBC's listeners remain concerned about the timeliness of news provided by NBC.

**Figure 29:
NBC Brand Perception Index by brand attribute**



* These statements have been phrased in a negative way in the survey and were reversed when constructing an index, to ensure comparability of the results across all brand attributes

Base:
n = 620 listeners who listend to NBC yesterday, in the last week or the last 4 weeks, 2014 study

2.2.2. TRIBE FM

| Tribe FM was set up in its current 3-hour format in 2008 to provide informative, entertaining and engaging programming that focuses on issues relevant to young citizens of Papua New Guinea. However, at present Tribe FM has limited recognition and listenership among its target audience; only 5% of all respondents⁶⁶ and only 6% of all 15–24 year-olds⁶⁷ listened to the program in the past year. The majority of these listeners⁶⁸ live in urban centres (62%), are male (70%) and reside in the Momase (39%) or Highlands region (34%). Interestingly, Tribe FM has attracted some listeners outside of its target group, with 35% of all annual listeners over the age of 30.

66 n = 1,303

67 n = 415

68 n = 61

“It’s my sister that listens to the program. She’s the one who has the radio [and] she was telling me [that] there’s a new program which I might be interested in, but I don’t have the chance to listen to it.”

Port Moresby, male regular listener, 18–24

| However, it is also important to note that the gap between awareness of Tribe FM and the program’s listenership is relatively small. Looking only at those who have heard of Tribe FM before (7% of all respondents), the vast majority, 75% of them,⁶⁹ also went on to listen to the program (at least once). For 15–24 year-olds this figure is even higher with 82% of those who are aware of Tribe FM⁷⁰ saying they have listened to it before. This suggests that the concept of Tribe FM is highly appealing to its target audience and that the challenge in increasing its listenership may lie primarily in improving the marketing of the program.

| Overall, interest in youth-oriented programming among young people is high and such offering presents an opportunity for NBC to attract a significant new audience that is currently not tuning into its other programs on national and provincial stations. This finding is also confirmed by the insights from the citizen discussion groups.

| Further, the findings from the citizen discussion groups and the survey indicate that PNG youth are looking for diverse programming that combines more serious news content with music, sports programming, and lighter content such as comedy and entertainment (Figure 30).

| Educational content, particularly on social issues that are affecting their communities and youth specifically (teenage pregnancy, child raising, alcohol and betel nut abuse) and their impact on young people’s lives, are also high on youth’s agenda, as are health programs on issues such as HIV/AIDS, STIs and maternal health. Coverage on job vacancies is also of particular interest to some and given that many young people turn to media (e.g. newspapers) to look for jobs, this type of programming may appeal to many potential Tribe FM listeners.

“There should be a program [teaching] young people how to look after themselves and manage their lives. That way they can create good things in the future and develop as people to become good future leaders. There are a lot of bad influences and the young people need to be taught properly so when the elders pass [away], the next generation will be able to help develop our country and take care of the people.”

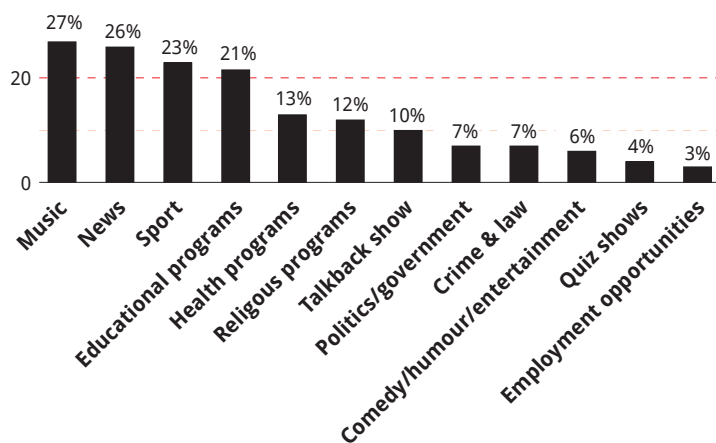
Morobe, male non-listener, 18–24

69 n = 89 respondents who have heard of Tribe FM before

70 n = 31 respondents who have heard of Tribe FM before

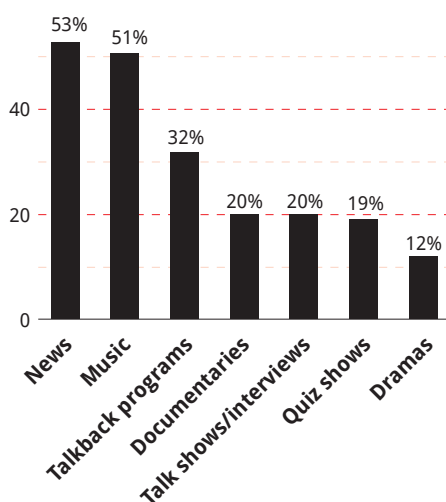
Young people's interest in news is confirmed by their views on which types of programming should be broadcast more on the radio, with news topping the list alongside music and sport (Figure 31).

Figure 30:
Preferred content for a youth-oriented radio station



Base:
n = 704 respondents aged 18-30 in 2014

Figure 31:
Types of programs that should be featured more on the radio



Base:
n = 704 respondents aged 18-30 in 2014

| However, as noted above, it is important to recognise that this young generation tends to have diverse interests and also pays particular attention to how the content on radio is delivered. Therefore, high quality news content alone will not be sufficient for attracting and retaining this increasingly media-savvy and demanding generation of listeners. Instead, an appealing mix of up-to-date news, music and lighter content, delivered in a modern, interactive and dynamic style will be needed to attract the attention of this audience segment. This would require NBC to significantly improve its performance in areas where its main competitors have so far held the edge over the national broadcaster.

“If you can play some good music like 96 FM (Nau FM) plays, some, can I say, R&B music or [something] like that. Play the latest music, not old music that we normally listen to – that will really get the attention of young ones.”

Port Moresby, male non-regular-listeners, 18–24

| Furthermore, the insights from the study also suggest that the timing of these different types of programming may also need to be different to attract the optimal audience among the younger generation. As the results of the survey show, youth (both 15–19 year-olds as well as 20–29 year-olds) prefers to listen to the news in the morning (46%⁷¹), music in the evening (47%) and dramas and documentaries in the afternoon (21%, 17%, respectively) or in the evening (22% and 21%, respectively). However, youth express no particular preference for the timing of talk shows, talkback programs and quiz shows, which are likely to be listened throughout the day.

2.2.3. KUNDU TV

| Kundu TV’s weekly viewership saw some diversification since the 2011/12 study, however, its audience remains predominantly urban, young, better educated and concentrated in the Highlands region. This is largely a consequence of the limited TV infrastructure in rural areas, varying TV signal strength across the provinces, and better household access to TV among the better-educated and wealthier citizens.

| Similar to NBC, Kundu TV news and current affairs program is considered its flagship, with 71% of its regular audience noting that they like this type of programming. In fact, the vast majority of Kundu TV’s regular viewers call for a further increase of news coverage, while about half of them also want to see more movies, educational content and PNG cultural programming (Figure 32).

Profile of Kundu TV weekly viewers

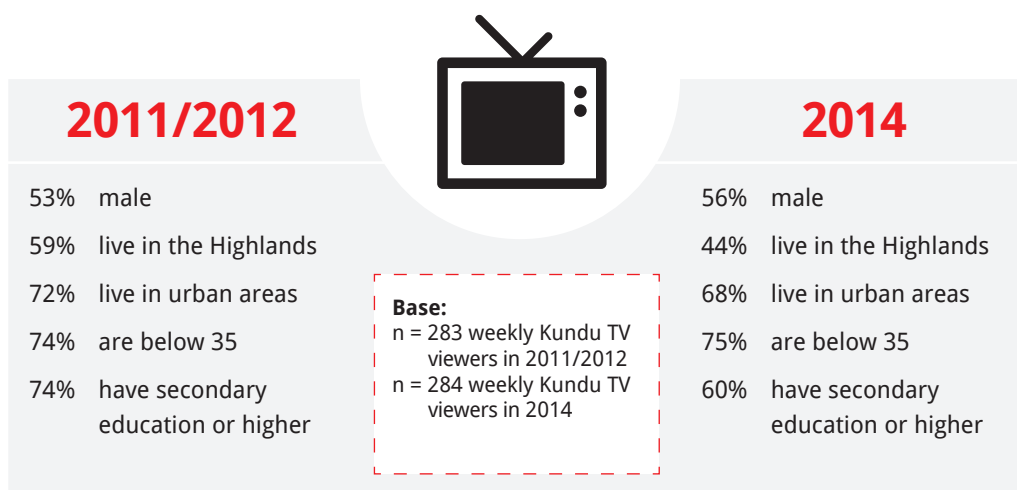
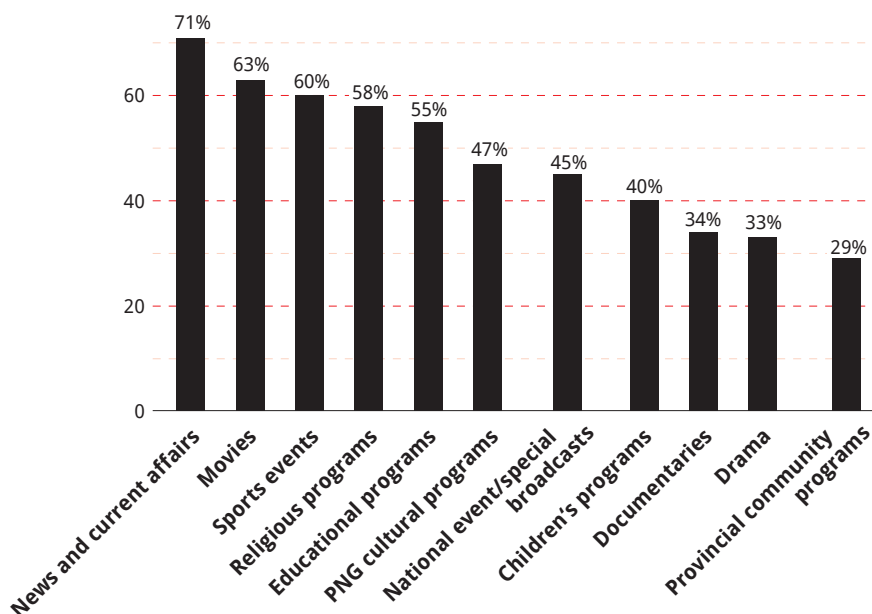


Figure 32:
Kundu TV programs liked by its weekly viewers



Base:
n = 283 weekly Kundu TV viewers in 2014

| Regular Kundu TV viewers are divided on the issue of the language in which Kundu TV should broadcast, with 52% preferring Tok Pisin and 46% expressing a preference for English.⁷²

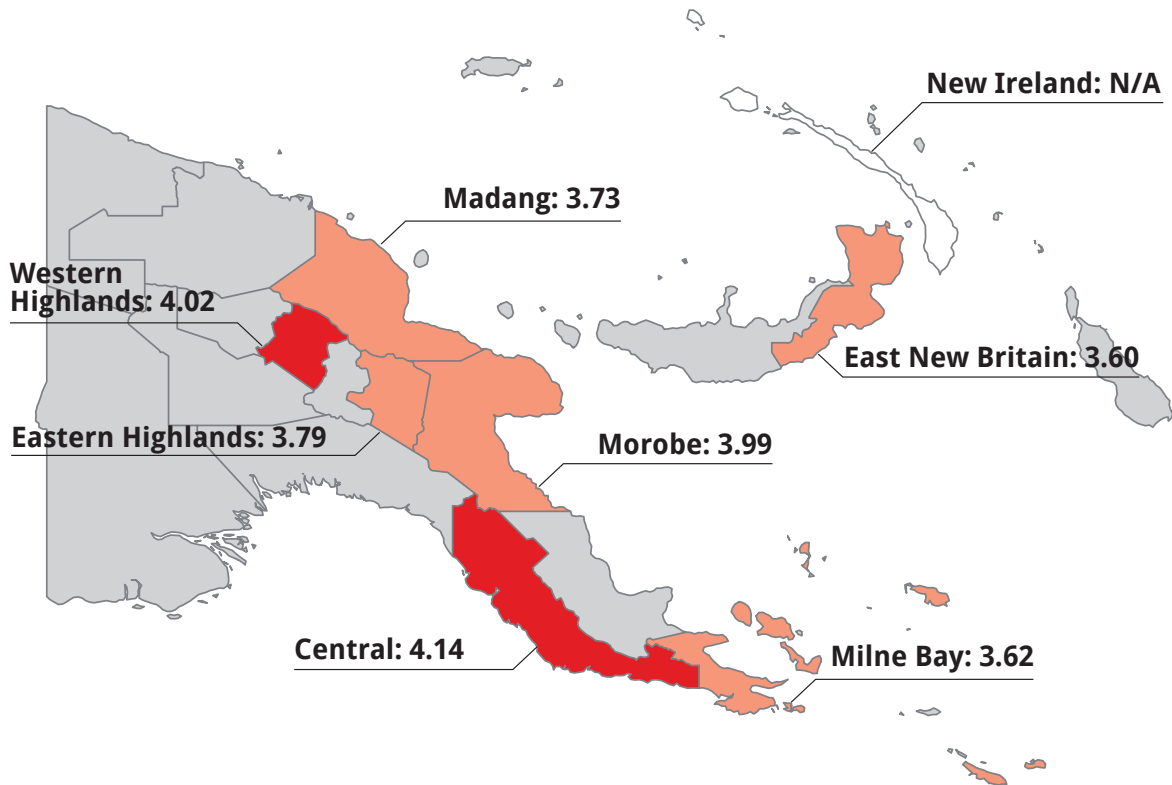
⁷² Kundu TV typically mixes English and Tok Pisin in its programming.

VIEWERS IN CENTRAL HOLD THE MOST POSITIVE VIEW OF KUNDU TV

As with NBC radio, the overall appeal of the Kundu TV brand among its audience was measured by constructing a Kundu TV Brand Perception Index (Figure 33), which is based on the audience’s perception of the station along eight different brand attributes, outlined below (Figure 34). Unlike the NBC Brand Perception Index, this index was constructed only for heavy Kundu TV viewers who had watched the station in the last 7 days.

| The perception of Kundu TV is the most positive in Central, where it reaches 21% of its residents weekly, compared to EMTV’s 49% and Australia Network’s 24%. In contrast, its image seems to be the weakest, although still positive, in East New Britain, where it reaches about a third (31%) of all citizens.

**Figure 33:
Kundu TV Brand Perception Index by province**



Kundu TV Brand Perception Index:

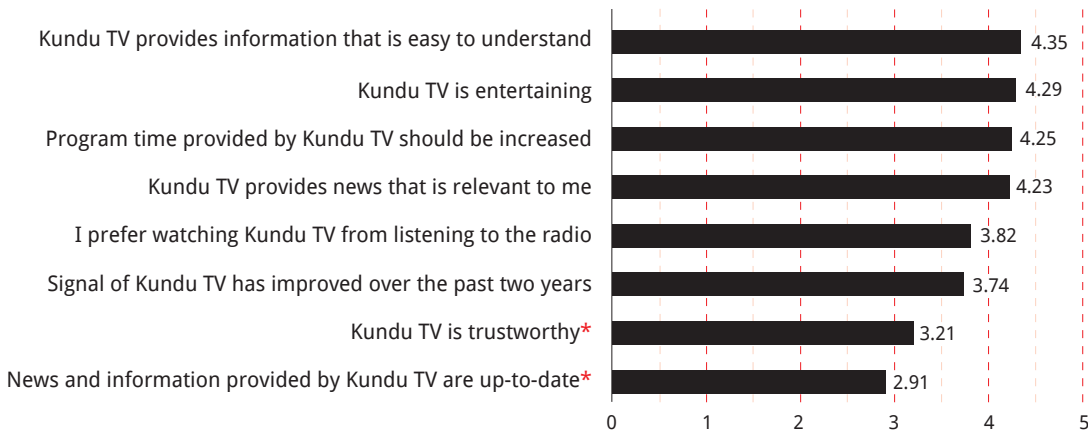
The Kundu TV Brand Perception Index has a range of 1–5 indicating the appeal of the Kundu TV brand. The higher the score, the more positive is the attitude towards a particular aspect of the Kundu TV brand or the brand overall.

Index Score: 1-5

- 1.00-3.00 Negative brand perception
- 3.01-4.00 Moderately positive brand perception
- 4.01-5.00 Highly positive brand perception

| The clarity of information and entertainment value of Kundu TV are the two aspects that are the most appreciated by its regular viewers. Areas for improvement appear to lie mainly in the timeliness of news and information it provides and the level of trust this information inspires in its audience (Figure 34). It is also important to note that these two weaknesses often appear together in viewer’s minds – those who consider Kundu TV untrustworthy, are also much more likely to see it as not up-to-date. On the other hand, those weekly viewers who consider the station entertaining are also more likely to believe that it provides relevant news, information that is easy to understand, and prefer it to listening to the radio.

**Figure 34:
Kundu TV Brand Perception Index by brand attribute**



* These statements have been phrased in a negative way in the survey and were reversed when constructing an index, to ensure comparability of the results across all brand attributes

Base:
n = 283 viewers of Kundu TV

2.2.4. YUMI GO WER?

| Yumi Go Wer?⁷³ is a multi-platform (radio, TV, social media) NBC brand that promotes informed public discussion on governance issues. Under the Yumi Go Wer? brand, NBC broadcasts a weekly 15-minute TV show, weekly governance news, and a live panel show on provincial and national radio. A total of eight live radio panel shows went to air between October 2013 and the start of the 2014 survey.

| The latest study shows that 11% of all survey respondents⁷⁴ recognise the show, and only 8%⁷⁵ have ever watched or listened to the show. Among weekly radio listeners⁷⁶ awareness and reach⁷⁷ of Yumi Go Wer? were recorded at 14% and 9%, respectively, and among weekly TV viewers⁷⁸ at 15% and 10%, respectively.

“Yesterday and the day before, they advertised it. They did not put on the program yet. They advertised it on TV and I saw it.”

Mount Hagen, male regular listener, 25+

| The majority of those who have listened or watched the program⁷⁹ before accessed it either on Kundu TV (34%), NBC Western Highlands (27%) or on NBC Eastern Highlands (14%). The majority (62%⁸⁰) accessed the program only on the radio, about a quarter (26%) both watched it on TV and listened to it on radio and 12% only watched it on TV. The three main topics discussed on these episodes were government transparency, education and health (Figure 35). Less than one in ten (6%) of all who have seen or heard the show before also visited its Facebook page.

| Despite the current low audience attention, insights from citizen discussion groups and the survey illustrate that the show is highly valued by PNG citizens. More than three quarters (78%) of those who have seen or heard the show before believe that the program is relevant to them. That the interest in Yumi Go Wer? is high, is also suggested by the fact that the majority of those who have heard of the program⁸¹ (70%) also listened to it or watched it. Similar to Tribe FM, the key in increasing its audience may lie in increasing its overall awareness by strengthening the marketing component of the program.

73 Yumi Go Wer? branding was first used for TV and governance news reporting in February 2012. The Yumi Go Wer? live radio panel show was first broadcast in October 2013.

74 n = 1,303

75 n = 1,303

76 n = 689

77 This includes those who have listened to the show at least once before.

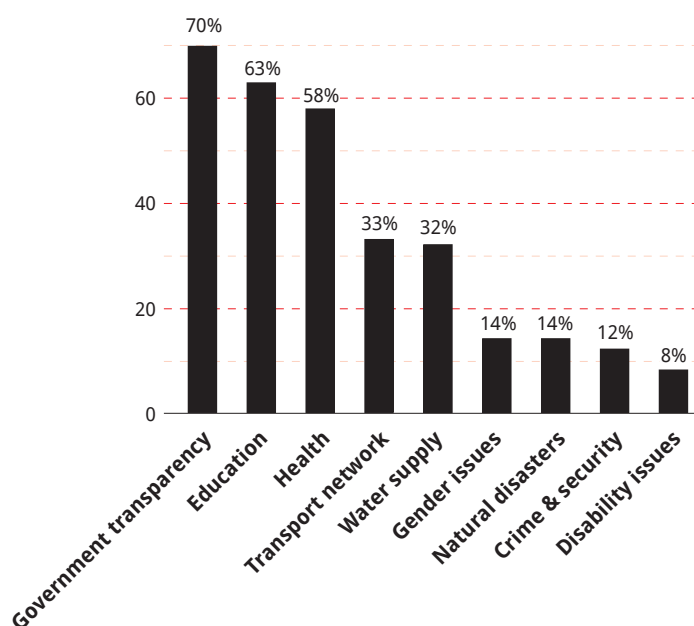
78 n = 537

79 n = 101

80 n = 89 respondents who provided a specific answer on which station they listened to or watched the program on.

81 n = 144 respondents who have heard of Yumi Go Wer? before

**Figure 35:
Topics discussed on Yumi Go Wer? programming listened
to/watched by respondents**



Base:

n = 101 respondents who have listened/
watched Yumi Go Wer before

| The top three topics that the audience feels Yumi Go Wer? should cover more extensively include health issues affecting youth (e.g. TB, HIV/AIDS, maternal health and teenage pregnancy), education, and governance issues such as government transparency. The main recommendation regarding the format of the program was related to its length, with about a tenth of all listeners suggesting that the program should be longer.

“Another thing also affecting our community is unwanted pregnancies. [This] is happening in our village and I believe in some other places as well. What I will say is that they should [provide] more awareness [programs] on how to prevent unwanted pregnancies for girls and for our young couples [and] how to plan [and] how to space their children.”

Port Moresby, male non-regular listener, 18–24

| Participants of the citizen discussion groups also expressed a preference for Yumi Go Wer? to be provided in English and Tok Pisin, and a few from Port Moresby suggested that the content should also be made available in Motu.

2.3. Disaster Broadcasting: Information Needs and Gaps

2.3.1. OVERALL DISASTER PREPAREDNESS OF PNG CITIZENS

| The Asia-Pacific region is the world's most disaster-prone region, with the highest number of people killed or otherwise affected by natural disasters between 2002 and 2011.⁸² According to the Centre for Research on the Epidemiology of Disasters, between 2005 and 2014 PNG experienced 20 major disasters, which overall affected more than half a million people.⁸³

| Climate change has further increased the risk of natural disasters and occurrence of extreme weather events in the region, including Papua New Guinea. However, international organisations estimate that the capabilities of local authorities to cope with this increased risk and adequately respond to natural and other disasters, such as major disease outbreaks, remains low.⁸⁴ This leaves PNG citizens highly exposed to the hazards of such events and means that they often have to rely on their own resources and networks to prepare for these occurrences and to cope with their consequences.

| To obtain deeper insight into the level of natural disaster preparedness of PNG citizens and better understand the current information gaps, the 2014 audience survey gathered data on the extent of citizens' knowledge of how to prepare for different natural disasters. This included cyclones, earthquakes, floods, tsunamis, droughts, volcanic eruptions and landslides, and the level of their awareness of how to stay safe during these occurrences.

| Their responses to these questions formed the basis for the construction of a **Natural Disaster Readiness Index**, which was designed to assess the level of overall preparedness of PNG citizens for all types of natural disasters common in PNG.⁸⁵ In addition, the Index also assesses their readiness for specific disasters that are reportedly the most common in a specific province (Figure 36).

The analysis revealed four key insights:

- First, the **overall preparedness** (for all natural disasters included in the survey) of PNG citizens across different provinces **is low** (2.33 on a scale of 1–4). Those who live in Madang feel particularly uninformed about how to prepare for various types of natural disasters (index score of 1.77) while those in East New Britain consider themselves the most well prepared – although still only moderately (index score of 2.6). As some natural disasters are more common and others are rare or even non-existent in individual provinces, this result is expected. However, given the greater frequency and diversity of natural disasters occurring across the country due to climate change, this low awareness of how to prepare for and stay safe during these different disasters is problematic. It is imperative that these information gaps are addressed to minimise the impact of the future natural disasters on the local population.

82 UNESCAP. (2013). *Natural Disasters*. Retrieved November 9, 2014, from UNESCAP: <http://www.unescap.org/stat/data/syb2013/F.5-Natural-disasters.asp>

83 The International Disaster Database. (2014). *Papua New Guinea Country Profile – Natural Disasters*. Retrieved November 9, 2014, from The International Disaster Database: [http://www.emdat.be/result-country-profile?disgroup=natural&country=png&period=2005\\$2014](http://www.emdat.be/result-country-profile?disgroup=natural&country=png&period=2005$2014)

84 European Commission. (2014). *Papua New Guinea ECHO Factsheet*. Retrieved November 9, 2014, from European Commission: http://ec.europa.eu/echo/files/aid/countries/factsheets/papua_new_guinea_en.pdf

85 This includes cyclones, earthquakes, floods, tsunamis, droughts, volcanic eruptions and landslides.

- Second, the level of preparedness is associated with personal experience and **citizens consider themselves better prepared for those types of disasters that they have experienced in the past**. The only exception is Morobe, where its residents feel better prepared to cope with floods and drought than earthquakes, which was mentioned by the survey respondents as the most common type of disaster in the province. In Madang, on the other hand, disaster readiness knowledge for cyclones was higher than for earthquakes, despite the similar level of experience with the two.⁸⁶

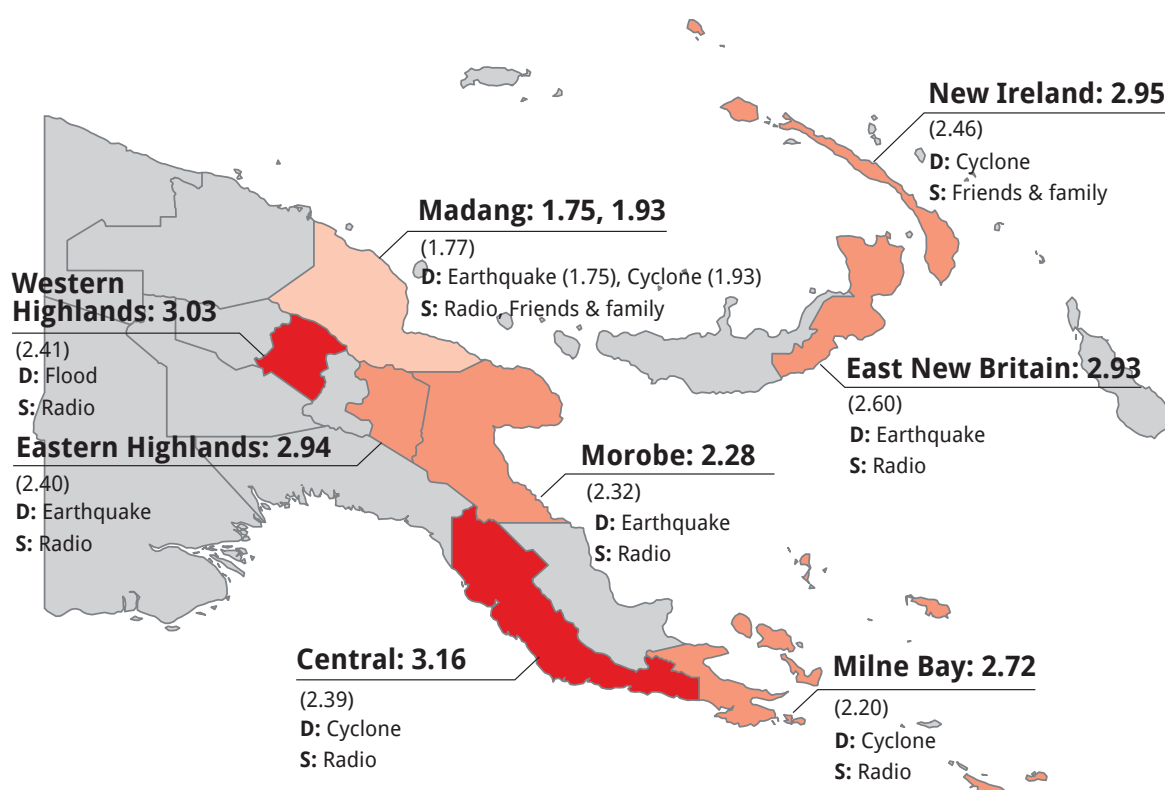
While this link between readiness and experience may be expected, this finding means that those **segments of the PNG population who have less past experience with natural disasters** (e.g. young people or residents of provinces that have in the past been less prone to natural disasters), **may be more vulnerable to future natural disasters** as their knowledge of how to prepare and respond is considerably more limited.

- Third, although radio plays a crucial role in providing PNG citizens with information on natural disasters in many provinces, **the overall level of media use is not strongly associated with how well prepared citizens feel to cope with natural disasters**. This suggests that while radio may be important for informing the citizens about impending disasters and keeping them up to date with developments while the disaster is happening, past experience and word-of-mouth play a central role in raising awareness of how to prepare and stay safe during these events.
- Fourth, **disaster preparedness** is not uniform across the country and **varies significantly between different provinces**. Particular differences include the level of knowledge that citizens have about how to prepare for and stay safe during disasters, as well as the sources that they turn to for information on these occurrences.

| Figure 36 (below) provides a more detailed insight into the disaster readiness on the level of individual provinces, the most common disasters in each province (as reported by the survey respondents) as well as the main sources of information on these events.

86 Please note: Madang experienced a cyclone on April 7, 2014, which may have influenced some responses to these questions. The data collection in Madang took place between April 2 and April 9, 2014.

**Figure 36:
Natural Disaster Readiness Index**



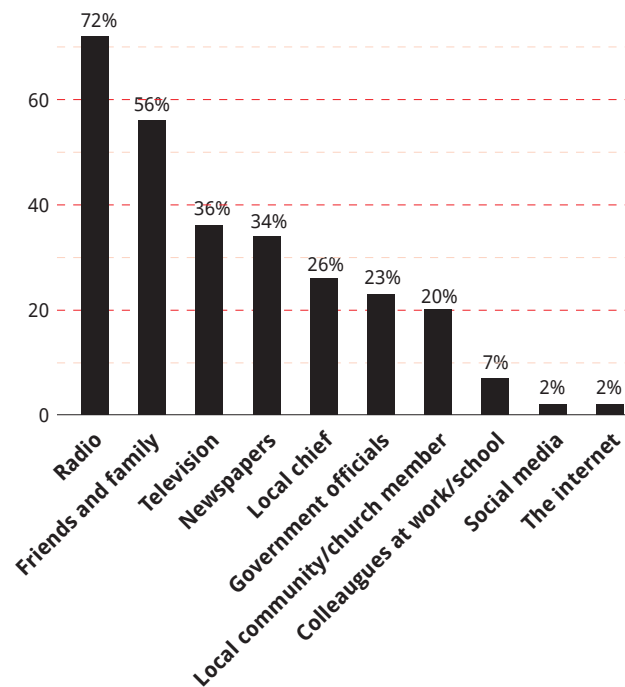
<p>Bold Index Score:</p> <p>Disaster Readiness Index for the disaster most common in a particular province</p> <p>D:</p> <p>The disaster experienced by the largest share of respondents in a particular province</p>	<p>Index Score in brackets:</p> <p>Overall Disaster Readiness Index for all types of natural disasters (cyclone, earthquake, flood, tsunami, drought, volcanic eruption, landslide)</p> <p>S:</p> <p>Most used source for information on natural disasters</p>	<p>Index score range: 1-4</p> <p>1.00-2.00 Not prepared</p> <p>2.01-3.00 Moderately prepared</p> <p>3.01-4.00 Well prepared</p>
<p>Natural Disaster Readiness Index is based on the citizens' self-reported knowledge of how to prepare for different types of natural disasters (cyclones, earthquakes, floods, tsunamis, droughts, volcanic eruptions and landslides) and their self-reported knowledge of how to stay safe during each of these disasters.</p>		

2.3.2. SOURCES OF INFORMATION ON NATURAL DISASTERS

| In addition to exploring the level of citizens' preparedness for natural disasters, the survey also identified the sources of information that citizens turn to in order to stay informed about these events.

| Radio remains the key source of information on natural disasters for almost three quarters of all PNG citizens, despite reduced access and use across the provinces (Figure 37). However, insights from the citizen discussion groups indicate that information provided by the media, including radio, is at present limited to warnings of impending natural disasters during weather reports or news reports on disasters that have already happened, and associated damage. Simultaneously, there is a significant lack of awareness-raising media programs outside times of natural disaster that would educate citizens on how to prepare and respond to natural disasters.

Figure 37:
Most used sources for information on natural disasters



Base:
n = 1,303 respondents in 2014

| This absence of regular educational media programming on natural disasters or other public information campaigns also means that word-of-mouth sources remain extremely important. Personal networks and advice of older members of the family or community play a crucial role in informing people about the risk of natural disasters, and helping them prepare and respond to these events. However, it is also important to note that the type of information that is typically obtained through personal networks is limited only to the disasters that other members of the community have experienced.

“We have gone and tried to talk to the councillor but the councillor has not come, so we just stay around and anything can happen at any time. Sometimes we get information from the radio or see it in the newspaper. But not really, we just look out for ourselves.”

Port Moresby, male regular listener, 25+

“Nobody came to help or give education, so the people that survived just left it in God’s hands.”

Morobe, male non-listener, 18–24

“We don’t receive any warnings from the government about this, but this has happened from the time [and] our grandparents [have] passed message down to us.”

Mount Hagen, male regular listener, 25+

“We only get information from our elders. They tell us to look after our gardens and tell us where to plant, like stay away from swamp areas and go deep into the bush. So only our elders give us information, no other disaster groups [provide] any type of awareness.”

Morobe, male non-listener, 18–24

| Discussion group participants only noted one official source that provided them with information on how to prepare for natural disasters - the National Disaster Management Centre. One participant also mentioned a training program she attended at work and a few others heard about how to prepare for natural disasters in school.

“When they come (representatives of the National Disaster Management Centre) they used to announce that those of you who build your houses in the coast, try to remove your houses and build up, leave the coast and come a bit [inland].”

Mount Hagen, male regular listener, 18–24

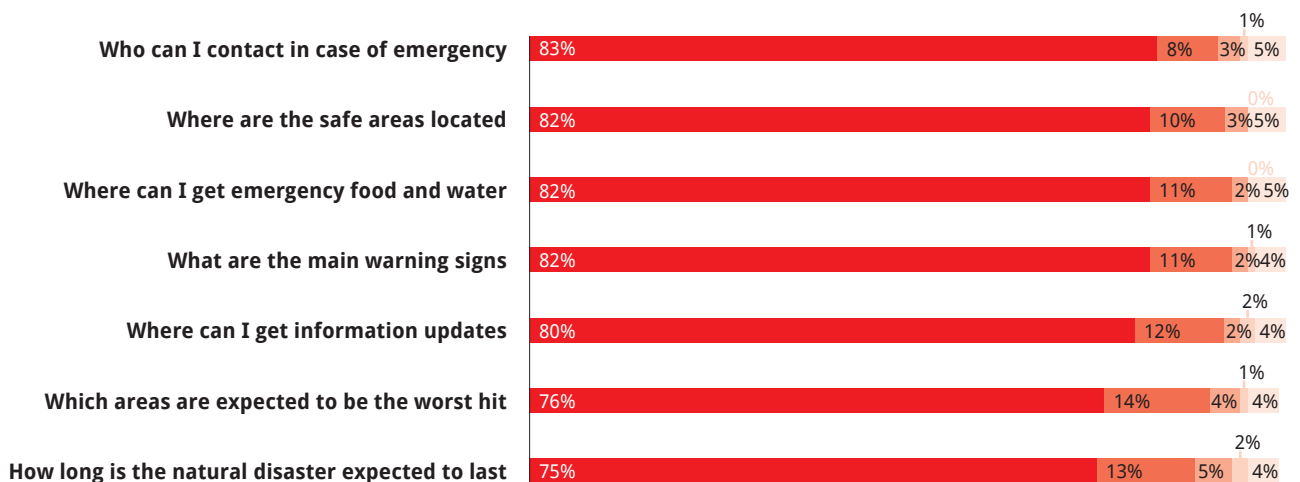
“So when everything is wrong [after the volcano erupted], after that they (National Disaster Management Centre) came but, they did not do [any] awareness [raising] or tell us that the eruption will occur [in advance]. So when people ran away, that’s when they came to inform us and did an evaluation plan or something like that.”

West New Britain, male non-regular listener, 25+

2.3.3. KEY INFORMATION NEEDS DURING NATURAL DISASTERS

The very high share of PNG citizens who emphasise the importance of getting different types of information while the disaster is happening confirms this gap in information provision on natural disasters (Figure 38). Even the information that ranks the lowest on citizens’ priority list, i.e. the details on the duration of the particular disaster, is still considered very important by three quarters of all citizens.

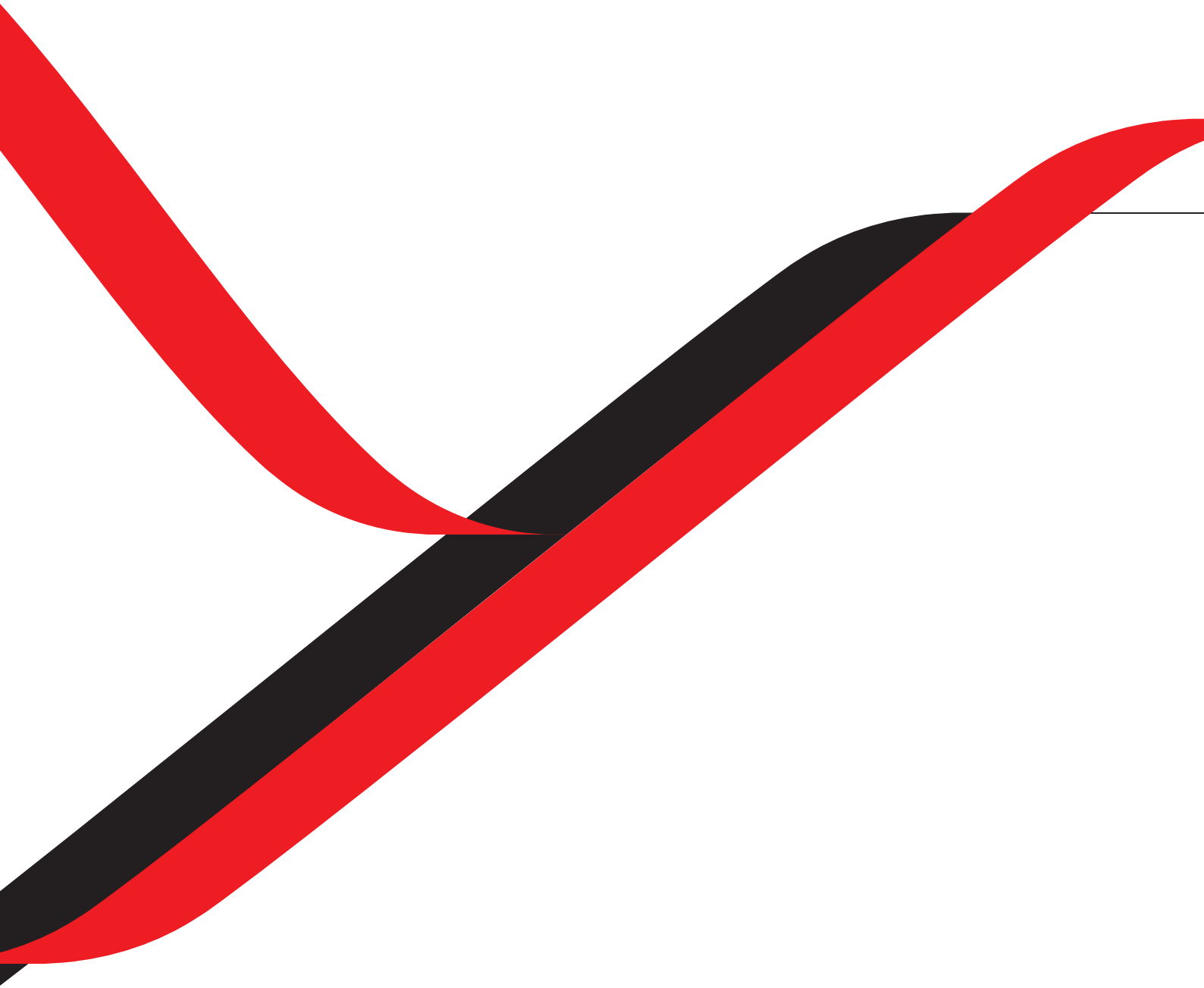
Figure 38:
Importance of specific information during disasters



■ Very important
 ■ Quite important
 ■ Neither important nor unimportant
 ■ Not important
 ■ DK/Ref

Base:
n = 1,303 respondents in 2014

3. CONSIDERATIONS



IMPROVING RADIO AND TV REACH AND AUDIENCE ENGAGEMENT

PRIORITISE IMPROVING RADIO SIGNAL ACROSS THE COUNTRY

Poor or non-existent radio signal is presently the main barrier to radio listenership in many parts of the country, including some urban areas, and strengthening of the signal is imperative for maintaining the current level of listenership and attracting new audience.

MAINTAIN HIGH QUALITY NEWS COVERAGE, BUT IMPROVE TIMELINESS OF NEWS

Continue providing diverse and detailed news coverage, including national, international, provincial and other news, but put more emphasis on ensuring that this news is regularly updated and minimise repeating the same news several times a day.

IMPROVE INTERACTIVITY OF RADIO PROGRAMS

Ensure that radio programs incorporate a greater number of interactive elements that allow listeners to actively participate in the program. In addition to providing a call-in or text-in facility, this may also include other techniques and types of interactive programming, such as quiz shows, competitions, collaborations on designing a playlist via the radio stations' Facebook page or other types of engagement with the audience via social media during the program.

MODERNISE RADIO PRESENTATION STYLE

Modernise radio presentation style and ensure that moderators are dynamic and that their language is suitable for the target audience and their pronunciation clear.

INVEST IN TV INFRASTRUCTURE AND PROGRAMMING

TV is fast becoming the medium of choice for many whose media use is not dictated by limited media access. Investing in developing both TV infrastructure and appealing TV content is imperative for ensuring future audience growth. This is particularly important for attracting a younger audience and increasing audience share in urban areas. However, the same trend in media preferences is likely to occur in rural areas once TV infrastructure improves and media access in these areas diversifies.

DEVELOPING CONTENT FOR YOUTH

STRENGTHEN MARKETING OF TRIBE FM, WITH A FOCUS ON UNDER 30S

Better promotion of Tribe FM among PNG citizens under 30 years of age is crucial for raising awareness of the program, which is currently still relatively unknown, and ultimately improving its listenership levels. Advertising of the program should appear on NBC radio and Kundu TV programs, ideally in prime-time slots (morning around 6am, at lunchtime, and between 6pm and 10pm), and should also draw on non-traditional channels, such as Facebook. Furthermore, Tribe FM could be promoted directly to potential users through organisational touch points, such as schools and universities or various youth organisations.

DIVERSIFY RADIO CONTENT

Expand radio programming by including content that responds to the need for diversity, emphasised by the younger segments of the radio audience. Maintaining the level and the quality of news coverage is important, while ensuring sport, music (RnB, pop, modern pacific music, country and rock) and lighter content, such as quiz shows, entertainment and stories about young people from across the country are also sufficiently covered.

TAILOR THE TIMING OF DIFFERENT GENRES TO YOUTH LISTENING HABITS AND PREFERENCES

Ensure that the scheduling of different types of content targeting youth takes into account both their listening habits and preferences. For example, to optimise engagement with youth, concentrate news coverage in early morning (starting at 6am), provide modern music in the evenings (between 6pm and 10pm), dramas and documentaries in the afternoon or in the evening and schedule talk shows, talkback programs and quiz shows throughout the day.

ENSURE THAT MEDIA CONTENT IS OPTIMISED FOR MOBILE INTERNET

Internet use is slowly growing and a large segment of the PNG population already accesses the web and media content via their mobile device. In line with global trends, it can be expected that consumption of media content – both audio and text based as well as video content – on mobile devices will accelerate over the next few years. To ensure a stake in this growing market, it is imperative to optimise media offerings and content accordingly.

EXPANDING CONSUMPTION OF YUMI GO WER?

IMPROVE PROMOTION OF YUMI GO WER?

As with Tribe FM, Yumi Go Wer? would benefit from increased advertising, both in mass media (radio, TV, print), as well as through offline channels. Community organisations and networks (e.g. church) on the local and provincial level may be a particularly effective channel for raising awareness of the program and driving its listenership and viewership.

STRENGTHENING CITIZENS' DISASTER PREPAREDNESS

DURING NATURAL DISASTERS, ENSURE REGULAR AND FRESH UPDATES AND EMERGENCY INFORMATION

While natural disasters are happening it is essential that the information provision on the progress of these extreme natural events is regular and up-to-date. As such, these updates should not be limited to time slots dedicated to weather reports, but should be provided more frequently, outside of regular news reports.

DEVELOP EDUCATIONAL CONTENT ON HOW TO PREPARE AND RESPOND TO NATURAL DISASTERS AND DISSEMINATE IT OUTSIDE THE TIMES OF NATURAL DISASTERS

To help the population better prepare and respond to natural disasters, educational content and programs should be developed and disseminated regularly and not limited to times of natural disasters. This content should be provided in different formats, suitable for different segments of the population (e.g. adults and children) and provided both in English and Tok Pisin.

TAILOR EDUCATIONAL CONTENT ON NATURAL DISASTERS TO SPECIFIC NEEDS IN INDIVIDUAL PROVINCES

While it is important for citizens across the country to have sufficient knowledge on how to best prepare and respond to different types of natural disaster, particular emphasis should be given to the most prevalent natural disasters. As such, educational content and programming in Central, Milne Bay and New Ireland should have a particular focus on cyclones; in Eastern Highlands, East New Britain and Morobe on earthquakes; in Western Highlands on Floods; and in Madang on earthquakes and cyclones.

4. METHODOLOGY

The page features a minimalist design with three main graphical elements: a thick, dark grey diagonal line running from the bottom-left towards the top-right; a thick, vibrant red curved line that starts on the left, dips down, and then rises towards the right; and a thin, light red curved line that follows a similar path to the red line but is much less prominent.

| The 2014 Citizen Access to Information in PNG study employed a mixed-method research approach, including a quantitative survey and qualitative focus group discussions. This methodological approach closely followed the design used in the 2011/12 Citizen Access to Information in PNG study, which was used as the baseline for tracking any change in citizen’s media access and their media consumption habits. The final methodological approach and all research instruments were designed in collaboration with the ABC International Development research team.

| The 2014 Citizen Access to Information in PNG study was conducted in two phases:

PHASE 1: FOCUS GROUP DISCUSSIONS

Research design

The focus group discussions were designed to provide initial insights into citizen information needs, media access and media use habits, media content and format preferences and identify any changes that might have taken place since the 2011/12 study. They also explored potential reasons for these changes.

Sample

A total of 28 focus group discussions with regular NBC listeners, non-regular NBC listeners and those who do not listen to NBC were conducted across four provinces, as outlined in the table below.

**Table 1:
The structure of the focus groups**

	Port Moresby (Central)		Mount Hagen (Western Highlands)		Gule Village (West New Britain)		Waritzan village (Morobe)
Male 18-24	Regular listeners	Non-regular listeners	Regular listeners	Non-regular listeners	Regular listeners	Non-regular listeners	Non-listeners
Female 18-24	Regular listeners	Non-regular listeners	Regular listeners	Non-regular listeners	Regular listeners	Non-regular listeners	Non-listeners
Male 25+	Regular listeners	Non-regular listeners	Regular listeners	Non-regular listeners	Regular listeners	Non-regular listeners	Non-listeners
Female 25+	Regular listeners	Non-regular listeners	Regular listeners	Non-regular listeners	Regular listeners	Non-regular listeners	Non-listeners

Implementation and analysis

All focus groups took place in April 2014 and were conducted by local PNG moderators, trained by M&C Saatchi World Services Research & Insight. Each focus group had between four and six participants and discussions were conducted in a combination of English and Tok Pisin, depending on participants’ preferences.

All focus groups were audio recorded and the recordings were transcribed and translated into English by native speaking transcribers for analytical purposes. The English-version transcripts were then analysed by the M&C Saatchi World Services Research & Insights team, with key findings incorporated in this report.

PHASE 2: QUANTITATIVE SURVEY

Research design

The purpose of the second phase of research was to quantify the insights explored in Phase 1 and understand how prevalent these patterns are across different provinces and how they vary between different population subgroups.

Similar to the qualitative research, the design for the quantitative element replicated the scope of work from the 2011/12 Citizen Access to Information in PNG study, providing direct comparability of results between the two studies.

Sample

The 2014 study employed a multi-stage, stratified random sampling approach, which provided robust sample sizes in all four regions (Papua, Highlands, Momase, Islands). As in the 2011/12 study, the sample was designed to be equally distributed between regions, provinces and zones (urban, peri-urban, rural – accessible and rural – remote). While this split does not precisely match the distribution of the population as reported in the census data, this approach was used to ensure comparability with the 2011/12 study and provide sufficient sample sizes for detailed analysis of the findings within each region, province and zone.

The final achieved sample was slightly higher than the planned sample (1,280), with a total of 1,303 face-to-face interviews conducted across the four regions (Table 2).

The margin of error for the quantitative survey is ± 2.71 .

**Table 2:
Distribution of the survey sample**

REGION	PROVINCE	SAMPLE				
		Total	Urban	Peri-urban	Rural-accessible	Rural-remote
Papua	NCD	176	53	34	46	43
	Milne Bay	156	40	41	39	36
Highlands	Eastern Highlands	185	47	58	43	37
	Western Highlands	159	34	33	39	53
Momase	Morobe	154	40	30	44	40
	Madang	138	46	40	25	27
Islands	New Ireland	161	36	37	40	48
	East New Britain	174	55	36	58	25
		1,303				

Data collection and data entry

The English version of the survey questionnaire was developed by M&C Saatchi World Services Research and Insight in close collaboration with the ABC International Development research team. The questionnaire was then translated into Tok Pisin by Butuna & Smith Research Consultancy and piloted before the fieldwork began.

M&C Saatchi World Services Research & Insight conducted the supervisor training, interviewer training in Central and training of the data entry team. The interviewers and supervisors were recruited locally from the provinces where the research was conducted. A total of four moderators, six provincial survey team leaders, six provincial survey supervisors, 72 survey interviewers and 10 data entry team members took part in the data collection for this study.

The data entry was conducted centrally in Port Moresby, and was delivered by the local data entry team trained by M&C Saatchi World Services Research & Insight.

Quality control

Quality control procedures for this survey included a number of in-field and post-field checks, designed to verify the quality of collected data and address any challenges as soon as possible. These steps included:

- A manual check of all (100%) completed questionnaires at the end of each fieldwork day, to ensure that the questionnaires have been administered correctly.
- More than 25% of all completed questionnaires were back-checked via phone, to confirm that the interviews have been conducted according to the interviewer guidelines and to verify a sample of answers.
- More than 80% of all interviews were observed by the survey supervisors. This proportion is significantly higher than the standard target of 15%, and is largely related to the remoteness of some of the locations included in the survey and the need to ensure safety and security of the interviewers.
- Once the data have been collected, all (100%) completed questionnaires were checked again for completeness before the data entry began.
- Fifteen per cent of all questionnaires were double-entered, to verify the accuracy of the coded data.
- The final data set was submitted to robust data integrity checks and examined for deviations from population statistics.

Weighting

The purpose of weighting was to ensure that the final data reflected the structure of the PNG population by gender and age, and to achieve comparability of results with the 2011/12 survey.

The final sample from the 2014 survey was compared both to the results of the 2000 census⁸⁷ (for age and gender variables) and to the sample from the 2011/12 study (for income variable). Please note that the data collected in 2011/12 was not weighted by age and gender, as the structure of the final sample was in line with the results of the 2000 census.

This comparison showed no significant gender differences between the 2014 and the 2011/12 data, but revealed a discrepancy between the 2011/12 and 2014 samples in terms of age and income levels. As a result, a decision was made to weight the 2014 data by age, using the results of the 2000 census, and by income, using the results of the 2011/12 study to determine weighting targets. Please note that the 2000 census does not include any data on income levels of the PNG population that could be used for weighting purposes.

The results of the 2014 study can therefore be considered comparable with the findings of the 2011/12 study and provincially representative of the general population by age and gender, but not by other demographic factors.

⁸⁷ At the time of this report the data from the latest national census conducted in 2011 had not yet been released so was unavailable for use for weighting purposes

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Solomon Islands Media Assistance Scheme Social Media and Mobiles Qualitative Research Report

19 September 2013

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1. Introduction

The rise in use of social media in developing nations has been well documented (Paterson, 2013; Papoutsaki and Harris, 2008). Across the Pacific region, the rates of mobile phone and internet access continue to increase and while there still remain barriers to consistent and wide reaching citizen access, the affects of this proliferation are numerous. In Papua New Guinea it has been reported that up to 82% of all households have access to a mobile phone (InterMedia Europe, 2012). While in Vanuatu household access to mobile phones is 76% (InterMedia Europe, 2013) and in the recent Solomon Islands People Survey it was reported that 59% of respondents owned a mobile phone and 2% had a landline connection (ANU edge, 2013). Some research (Baym and Boyd, 2012; Paterson, 2013) has examined the use of social media as a tool used to increase political participation in various segments of populations. Willems discusses the efficacy of new media platforms stating that ‘new media have not only offered a broader array of opportunities to audiences and consumers to participate in their own media production, but have also changed the production practices of old media such as newspapers, television and radio stations’ (2013, 224). However, as yet, there is little analysis of the interactions between new media and traditional media in emerging contexts such as the Solomon Islands.

Key Research Objectives

This research provides key insights into how Facebook and mobile phones are impacting the media production landscape of the Solomon Islands and in particular, how they are influencing agenda setting.

This qualitative research study focuses on:

- Gaining an understanding of the current communications / information landscape of Facebook in the Solomon Islands – how it is being used, who is using it, what the drivers of usage are, what type of conversations / issues are being discussed via Facebook, and what types of conversations / issues are ideally suited to this new media.
- Understanding how traditional media are currently intersecting with the emerging Solomon Islands Facebook communications / information environment – how does it influence or drive the agenda setting function of issues within the Solomon Islands media landscape / are they developing their own pages, are they attempting to engage with existing pages, and what are the key Facebook pages or groups they are engaging with.
- Determining the role of mobile phones in media production – including Facebook and any other functions / channels relevant to mobile technology.

2. Research Sample and Methodology

This was a small scale qualitative research project in which 18 individuals were consulted in Honiara in the form of two workshops with Journalists and Media professionals (each with 6 persons in attendance), and six In-depth interviews with Active Social Media Users (ASMUs) We defined ASMUs as: people who are not journalists or media professionals but who are active and frequent bloggers or commentators on issues that are of a social, economic, environmental or political nature. Active and frequent users were defined for the purpose of this study as those who made comment at least once fortnightly and their media of choice may have included Facebook, Twitter, Instagram, radio or other.

Fieldwork

Stancombe Research and Planning appointed a partner researcher in Honiara to facilitate the sessions, and two assistants to act as note-takers and interpreters within all the sessions. A Senior Researcher attended and worked closely with the local research team in a capacity building role, guiding and overseeing the research in Honiara and also providing strategic analysis and understanding. The primary fieldwork was conducted over a three-day period in mid August 2013 in Honiara. Solomon Islands Media Assistance Scheme supported the recruitment of research participants.

Stancombe Research and Planning also appointed a partner researcher to conduct a review of local Facebook pages, for which a template was provided as a guideline for analysis. This was done simultaneously to the fieldwork and required a local person who could engage easily in the social media context, gaining membership to closed pages and observing and interacting without language or cultural barriers.

The sample details are as follows:

Workshop #	No's	Target Market
1	6 pax	Journalist / Media Professional 2 x Female & 4 x Male 18 – 55 years
2	6 pax	Journalist / media Professional 2 x Female & 4 x Male 18-55 years
Interview #		
1	1 pax	Active Social Media Users (ASMU)
2	1 pax	Active Social Media Users (ASMU)
3	1 pax	Active Social Media Users (ASMU)
4	1 pax	Active Social Media Users (ASMU)
5	1 pax	Active Social Media Users (ASMU)
6	1 pax	Active Social Media Users (ASMU)

Limitations of Study

- This is not an audience study.
- The focus of the study is on social media and mobile phones. This study does not focus or assess the agenda-setting role of traditional media.
- The sample is 'educated, urban, media practitioners' and is not necessarily reflective of the views and opinions of the general Solomon Islands population.
- The study was conducted in Honiara only and so regional perspectives and experiences are given as hearsay only.

3. Key Learnings

- Social Media, and Facebook in particular, has become well entrenched in the media landscape in the Solomon Islands, particularly with those working in the media and broadcast profession, but it also extends to those living in Honiara and to some extent includes those living in the outer provinces. Facebook has by far the greatest traction of all social media platforms. Twitter has a very small uptake in the region, and those who do use it tend to use it for international news and updates. YouTube tends to be used in the music / video clip arena, but not, according to our sample, as a primary source of communication for most people.
- In evaluating how traditional media is intersecting with social media in the Solomon Islands two distinct groups emerge amongst media and broadcast professionals. There are those who view Facebook with a degree of trepidation and feel that the lack of guidelines and policy around how to use Facebook means it is not a 'serious' medium, and that it lacks the credentials, authority and expertise of the traditional media. This group tended to be more junior level (not yet at management stage), and felt the expectations of their management predicated their cautious use of Facebook. This is because there has been no clear directive or guidelines from their management about how they may or may not use Facebook as a media channel. Then there is a group of more senior media and broadcast professionals, most of whom have international experience, and who view Facebook and social media as having absolute authority, genuine credibility and as being the 'new generation' of media – these people see the inevitable growth and expansion of social media as an important part of Solomon Islands growth as a nation.
- Despite which of the groups the media and broadcast professional may fall into, at this stage they are tending to use Facebook and social media in a passive way rather than an active way. It is used as a tool for observation, monitoring public opinion, seeding stories – but the journalists themselves are not driving its use or setting the agenda in terms of what conversations are being had in the social media space. The 'pages' that are being used for genuine public discussion tend to be operated by Active Social Media Users (ASMU's), who influence agenda setting in terms of bringing issues and conversations into the public arena. Whilst some issues and stories may be covered in traditional media as well, it seems the ASMU's often present a different perspective and or invite a discussion where the traditional

media coverage does not. Journalists therefore are tending to watch, monitor and keep abreast of issues of social concern without taking the responsibility of 'owning' the conversation or, often, contributing to it. In this context they are relinquishing their roles as owners of public debate and discussion.

- For the ASMU's that have established sites and pages relating to a variety of interests, issues and causes (see Overview of Facebook Pages for a review of most popular pages). Facebook, in this context, is being used as the primary 'host'. In place of starting independent websites, which may be the norm in western societies, Facebook appears to provide an easy and cost effective forum for this type of activity. Furthermore, the option to create 'closed' pages means that membership or readership can be controlled and that entry is via invitation or approval only. This gives considerable 'credibility' to the group and the agenda of those members within the group and keeps any 'trolls' or outspoken and contrary people out of the discussion. The 'closed' Facebook pages resonate especially highly in the Solomon Islands where, culturally, identifying with 'groups' (in a regional / ethnic / family context) is the social behavioural norm.
- This sample believes that the emergence of social media and Facebook in particular, challenges the 'culture of silence' that exists more widely in the Solomon Islands. Within the Solomon Islands cultural context it is not generally acceptable to be outspoken, make a fuss, or to challenge authority or elders. Therefore, according to the sample, the emergence of social media very much marks the emergence of a new generation or new Solomon Islander, as they learn to voice an opinion and to embrace a right to be heard. In this way, traction of this new media will be slower than in other socio-cultural contexts, where having a 'voice' has become an established part of social fabric.
- Mobile phones are increasingly important in the communication landscape of the Solomon Islands. In the first instance, they are used as a fast and efficient medium through which messages of high importance can be relayed between urban and regional areas, primarily through family networks. Literally, messages of life and death, disaster and need were cited as the types of uses that mobiles are very valuable for. However, amongst the sample, there was little evidence of Journalists using mobile phones in this context. In the second instance, many journalists view mobile phones as the main mode of access to the Internet and Facebook, certainly in Honiara, but also in areas where there are few or no Internet connections or café's. It was suggested that 3G mobile phones can and will increasingly give access to social media and its platforms as more phone towers are erected in remote areas, giving more people access. According to the sample, the convenience of having the phone on you all the time meant that 3G phones were becoming the preferred method of connection across the Solomon Islands. In this way, the growing popularity of mobile phones seemed more to do with being a vehicle for social media access than as a phone as a medium in itself.

- With the 2014 Election looming, most journalists are tending to underplay the importance or impact that Facebook may have on the public debate and discourse leading up to that election – based on their view that it is still not a ‘fully fledged’ or authoritative media player. Interestingly, there was no evidence that any of the media professionals was intending to utilise this medium as a way of agenda setting or of ‘owning’ any discussion around issues of public interest. That said, some of the ASMU’s will certainly be using this medium as a forum for election information and coverage – and the journalists will look to them to set the agenda. There is much opportunity with the election looming for various media organisations and or individuals to open public discourse on social, political, environmental or economic issues – as well as using this medium as a broadcast tool for basic information regarding registering, voting, and other ‘how to’ information regarding the process of voting in the upcoming election.

4. Research Findings

4.1 The Current Media Landscape

The current media landscape is dominated by radio; with several FM stations (Wan FM, Paoa FM, Z FM, Gud Nuis FM, Gold FM, Wantok FM – the most cited) along with AM station SIBC. Radio has the biggest reach and is accessible by more of the population than any other medium so remains firmly entrenched. It is also the cheapest media to access given some radios can use solar power, and there are wind-up radios and cheap imported battery radio's (from China), which makes radio coverage available to most Solomon Islanders. It also has truly national coverage.

“In terms of who it reaches it does not discriminate”.

“A lot of people can sit around one radio and listen to it at the same time, or even one person listens and passes the news around. The radio informs and entertains; there is also music in the radio”. (Media Professional, Workshop 2, Honiara).

Following radio, newspapers (notably Solomon Star, Island Sun and Sunday Isles) are cited as the next biggest media when it comes to reach as it can be passed on and shared – hence spreading much further than its formal circulation numbers may indicate. However, newspaper is limited because it demands its audience to be literate (according to this sample, the majority of Solomon Islanders are not literate, which means they need to have the newspaper read to them).

Local TV (OneTV) appears to be declining in popularity with its recent shift to Pay TV from free-to-air, which means it is a cost prohibitive medium for most Solomon Islanders – even those living in Honiara.

Mobile phones were spoken about rarely in terms of being used as a media in themselves. In the context of the research discussions, mobile phones were considered by the sample more as vehicles of access to the internet and social media than as a medium in its own right, and it appeared mobiles had no major role in use as a broadcast communication tool in 'usual times'. In the instance of events however, such as an election or a tsunami, the sample did cite the use of texting to relay information.

“During the last election I couldn't call back to the office from remote areas to inform them of the results so I texted the result back to the office but we never have used mobile phones for our audience as a medium” (Media professional, workshop 1, Honiara).

“Yes [during the election] mobile phones were not allowed in the vicinity but some electoral officers were texting out updates even before the Governor General got to declare the winning candidates” (Media Professional, Workshop 1, Honiara).

Social Media and Facebook in particular, was felt to be rapidly gaining popularity and to be accessed by increasing numbers of people due to the introduction of 3G phones, which allow access without visiting an Internet café or having a computer to hand. Not surprisingly, it is seen as the youth media of choice, but it is apparent that the audience for Facebook is not just youth alone. Additionally, because it is so user friendly, it is not restrictive to literate audiences only.

“If you have a 3G mobile, whether literate or illiterate, a couple of people I know of, they are using mobile phones even though illiterate. That’s where they learn to read I think. Someone else opens their account for them, gets a photo shot of them and uploads it for them and shows them how to use it”
(Media Professional, Workshop 1, Honiara).

Email appears to be used predominately by urban, working people who have access to the internet during the course of their working day. Communication of media releases and stories is made mainly via email to those in the profession of media and broadcast journalism and then it is disseminated via whichever media those journalists are working in (radio or newspapers mainly). It is therefore mainly a ‘professional’ medium and not accessed by the majority population.

According to the sample, twitter currently has very little traction in the Solomon Islands and those who do use it are using it mainly to keep abreast of things happening internationally. This limited group of users are following friends or organisations that exist outside of the Solomon Islands. It was noted by participants in the research that Twitter is being used more in PNG and Fiji, which may indicate that it will gain traction over time in the Solomons – however there was a sense that the restrictions of 140 characters mean that it may be more culturally challenging for Solomon Islanders who tend to use long format language not short headline style communication. Furthermore, the short format was felt to be most relevant as a promotion or headline type ‘teaser’ format to then point an audience to a longer copy media such as the newspaper or Facebook, or TV, or radio.

“Twitter is where I go to find international and regional news – breaking news abroad”.

“Twitter has news every second so you are well updated on regional news. The bad side is the content, people and some artists swear in some comments. It’s good for short news and promotions”.

4.2 The Impact of Facebook

Facebook has rapidly become vastly popular in Solomon Islands for those who have access to it, and is used to share ‘everything and anything’ much the same as it is in western society. Similarly, the posting of pictures and visuals tends to be more ‘social’ in nature, with people

posting pictures of their social life and activities, parties, fishing, clothing, friends and food creations. In many respects it is seen as the gossip column of the modern age.

“Facebook is a daily talk in the household these days.” (Media Professional, Workshop 1, Honiara).

“Facebook can be compared to betelnut street forum, although the information might not be quality or factual, but it does get the info around.” (Media Professional, Workshop 2, Honiara).

In the past 2 years, Facebook’s usage has begun to change shape in the Solomon Islands as an older, educated audience has embraced it’s power as a medium for discussion and for driving awareness of acute social ‘issues’. Refer to the following analysis of actual sites for examples of the issues discussed on Facebook. Because of the two-way nature of Facebook, and the ability to discuss issues and get feedback on public opinion, it has become the media of choice for organised interest groups, NGO’s and some external organisations – driven largely by the freedom of speech it engenders.

“Fb allows people to interact and engage in real time, you get to say what you think and hear what others think. In the traditional media what you hear and read is the agenda of the media, their spin... whilst in Facebook you decide on your own based on various arguments, so much more informative”.

Consequently, there has been a number of Facebook pages that have been established and gained big memberships and popularity, which are designed to raise issues and facilitate discussion of those issues that are important on a national, regional and international level to people in the Solomon’s, and also PNG and Fiji. These pages all operate as ‘closed’ groups and are very network based. Membership must be requested, and only those applications that are approved by the organisations leaders will be accepted, thus ensuring there are no dissidents or disruptive members within the group. These pages tend to be very political in nature, covering issues such as corruption, and the conduct of public leaders, which are major national issues and high on the agenda for those seeking social and political change in the Solomon Islands. These pages are all operated by independent Active Social Media Users and include pages such as the following:

- FSII (Forum Solomon Island International).
- ANSI (Anti-corruption network Solomon Islands).
- YWPSI (Young Women in Parliament Solomon Islands).
- AWELSI (Advancement of women in education and leadership SI).
- TSI (Transparency Solomon Islands).
- ECCSI (Environment Concern Citizens of Solomon Islands).
- NHHK (Na Hal Hal I Kwara’ar ethnic language group).

These Facebook pages have a lot of impact in terms of agenda setting in the Solomon Islands. FSII in particular, which has been established for only around 18 months, has an almost ‘cult

like' status amongst the sample we spoke to, as a source of information and for bringing issues to public attention. FSII also has a record for agenda setting and for ensuing action. This sets social media apart from traditional media.

Examples of ensuing action from Facebook discussion include:

- YWPSI started posting about the short cut bus route, and people being unable to get to work, school and home on time because of buses taking short cuts and not sticking to the full routes. This also resulted in people spending too much money to get from point *a* to point *b* (having to use multiple buses etc.). Via Facebook, YWPSI were able to garner public momentum about this issue. They collected petitions and presented them to Parliament. Traditional media then picked up the story. According to research participants it is now likely that there will be a change to the existing legislation regulating the transport industry.
- Solomon Islands students attending the University of South Pacific (USP) in Fiji were not receiving their allowances (which reportedly happens each year). Students contacted FSII; FSII began posting about their troubles and what that meant to the students who were unable to pay for their lodgings and some having to go without food – and mobilised much public support for their case. Again, mainstream media then picked up the story and the matter was settled.

The FSII Facebook page in particular has gained such traction and respect as a forum for exposing social inadequacies and for discussion about issues of national interest, that the key FSII executive has now been offered regular meetings with the Prime Minister.

“We have a strategic plan; one of the key areas is to establish links with stakeholders and the government. We met with the Prime Minister three weeks ago...” (Active Social Media User, Interview, Honiara).

This is clear evidence of the impact Facebook can and is having on agenda setting in Solomon Islands.

4.3 The Intersection of Traditional and Social Media

Currently, the intersection of traditional and social media is a passive one, in that the traditional media practitioners, by and large, are still 'using' social media and not 'driving social media'. This is predominately because of fear, both of operating outside clear expectations and guidelines, and also fear of attracting compensation claims. The practise of seeking compensation is common in Solomon Islands and traditional media have been the victim of compensation claims many times.

“The practise of compensation claim is common in the Solomons which sometimes results from press releases”. (Media Professional, Workshop 2, Honiara).

If an opinion is expressed (and is debateable as fact) the person about whom that opinion or claim was written may well claim compensation for some type of defamation. This practise curtails the facilitation of public debate and freedom of speech, as anything written must be substantiated to ensure a compensation claim will not arise. This practise results in journalists fearing social media due to its interactive nature, and so they use it mainly as a source, a place to watch and monitor public discussion – but they are not taking part, steering or owning the discussions that occur on Facebook. In this respect their role is more as reporter and not commentator or agenda setter. The agenda setting on more controversial matters is coming from the ASMU's who run the pages.

“We don't really interact with the public on a level where we directly reply to their comments or share opinions, we have guidelines on that. We just put down the news and let the people comment” (Media Professional, Workshop 1, Honiara).

“I think because there is a lack of policies on social media for the news room that is why everything's not in place yet but with policies then the news room will have boundaries on social media” (Media Professional, Workshop 1, Honiara).

“Traditional media has their principles, rules, guidelines and everything in place whereas social media is open to everyone that can make their false comments whatsoever with no grounds, no boundaries. Traditional media has rules” (Media Professional, Workshop 1, Honiara).

There is a sense that as social media becomes more entrenched and people become more comfortable with this culture of exposure vs. silence that views from traditional media may change over time. However, the current situation is that most traditional media and broadcast practitioners have relinquished power over the agenda setting to those who are brave enough to be hosting these Facebook pages. The result is an alleged eroding of respect by the (educated) public for traditional media, its practitioners and its credibility.

“Facebook actually makes journalists lazy. Nowadays they just get their information from the Facebook pages then print it in papers or air it on radio... there is no longer quality of news in traditional media”. (ASMU Interview, Honiara).

“[Facebook] news comes directly from the source, not through a third party” (ASMU Interview, Honiara).

4.4 The Election 2014

Again, there was a substantial divide between the way journalists and media professionals see the role of social media in the 2014 Election, and the way that ASMU's see the role. This will be the first Solomon Islands Election since social media and Facebook have really

emerged in the area. Across the board, people feel it is a little too early on in its trajectory for it to play a really major role. Specifically, the fact that its reach is limited in the outer provinces and not all people have access to it, means its potential for this election appears somewhat limited.

“I do not think it will influence voters because it does not reach the majority of the Solomon Islanders” (Media Professional, Workshop 1, Honiara).

“I think it may be more influential in the elections after the 2014 one” (Media Professional, Workshop 1, Honiara).

The journalists and media professionals strongly down played the potential role of Facebook for the 2014 Election, feeling it is still too new to be effectively used by traditional media this time around. Most cite that it will largely be used by the public as a ‘gossip spot’ to comment on candidates. Also, and importantly, journalists suggested that Facebook may be used as a link between the provinces or constituents and the city, insofar as regional residents / family members will be able to text or post bits about what MP’s are doing and saying in their area and can spread that news to their family groups in the city.

In terms of its role, the media fraternity tend to see Facebook’s role in the 2014 Election as:

- Monitoring and updating on polling.
- Commentary on candidates (by public).
- Breaking news alerts (in a push-media format. i.e., no interactive dialogue).
- A link between regional and urban residents and their Point of View (each province has its own Facebook page).

Journalists see that Facebook will be mainly used by the public to scrutinise the election, but will not be used by the candidates themselves (none of who have a social media campaign person or presence). Interestingly, no journalists indicated their intention to use social media in any way leading up to or during the election in an agenda setting, issue-raising capacity but see themselves using it as a tool to monitor the stories and opinions posted by others.

“The public will use social media to scrutinise the pre and post-election outcomes but candidates are unlikely to use it” (Media Professional, Workshop 2, Honiara).

“Voters will be the main people to discuss on social media during the election” (Media Professional, Workshop 2, Honiara).

“It may be used in a negative way as well to share wrongful information about a certain candidate” (Media Professional, Workshop 1, Honiara).

The ASMUs are certainly seeing a more active and important role for Facebook in the election 2014, though there is still the sense that as a new media Facebook hasn't reached its potential as yet. Certainly some of the following Facebook pages reviewed are planning to take an active role in election coverage and in setting the agenda for the public discourse around the election, covering the key issues and information about electoral candidates.

In terms of its role, the ASMUs see a somewhat wider role including:

- Advocating about corruption, governance and leadership.
- Profiling the candidates and details of their participation and parliamentary conduct.
- Educating on the voting system and how to use it.
- Providing information on the new registration system and how it will work.
- Evaluating party specific pages detailing policies and projects.
- Monitoring and updating of polling progress.
- Sourcing funding to get a presence in each of the constituencies.

“Some of these [SI] pages are good and how they distribute their messages is very important. They should organise something formal. A page you can contribute to that is also practical” (ASMU Interview, Honiara).

“The registration system... that is the starting point, if the new system is successful that will set the first stage for social media” (ASMU Interview, Honiara).

“The candidate’s campaign manager, campaigning for them on social media...but this is the first time in an election, it will be interesting to see the role of social media in terms of this campaign and election” (Media Professional, Workshop 2, Honiara).

5. Conclusion

There is a perception that Facebook has become firmly entrenched in the Solomon's media landscape, as a 'social' media, as a reference source for journalists and as a forum for public discourse by the (self-appointed) key opinion leaders (ASMUs). Amongst our sample it is expected to have a growing audience as access widens both via the installation of more mobile towers and subsequently as more and more people get 3G phones with which they can access the internet.

Social Media is currently viewed by the media fraternity, with caution, due to the open nature of it, and the lack of clear guidelines and protocols on how to use it. They are currently passive users in a professional sense, relying on social media and Facebook as a tool for research and monitoring opinion and debate that is actually set by others (ASMUs).

The ASMUs are currently agenda setting via active use of social media, and as such appear to have diluted media power and credibility away from traditional media.

“Mainstream media quote them a lot in their stories which builds a trust towards them and people then give facts or links to solidify their posts”
(Media Professional, Workshop 2, Honiara).

Not only are they bringing national issues to attention and debate, but also chipping away at the culture of silence which has prevented freedom of speech in the past. In this way they are at the cutting edge of social change.

It will take a paradigm shift if the media fraternity are to embrace the new world of social media and to own public discourse, discussion and debate through agenda setting – and to act in such a way as to uphold journalistic values and code of practise. Unless this shift occurs, and with increasing voice going to the ASMUs, the media fraternity is in danger of losing its relevancy.

There is clearly an opportunity for social media to become a vibrant and dynamic communication medium within the Solomon Islands that, with time, could give rise to an equal share of voice between all people, regardless of cultural background, gender, age or other factors. It is apparent that this will take some time given the limitations around literacy, access and capability, but uptake will be faster when the new fibre optic cable is installed. This was variously cited as being due between 2014 and 2016.

There is also clearly an opportunity for Facebook to play a valuable role in disseminating information about the election. From a practical perspective, information about the new registration process, voting rules, poll locations, times etc. would be beneficial for the voting public. Candidate profiling and following / updating on their policy statements would ensure people are more informed about those they may or may not vote for. Pages such as FSII, WYPSI and ANSI will certainly be forums that bring issues to public attention and host discussion of those issues – but it does seem there is opportunity for a ‘one stop shop’ to be developed which puts all of these election elements in one place.

6. Overview of Top Eight (8) Facebook Pages

A Honiara based researcher working to a template, and under contract to Stancombe Research and Planning provides the following Facebook analysis.

5.1.1 Forum Solomon Islands International (FSII)

FSII sells its image as an organisation/ordinary Facebook discussion forum that is serious about Solomon Islanders’ welfare. From a small unit of likeminded individuals with convictions of positive change for the Solomon Islands, it gained favour and respect among other, well established organisations in the Solomon Islands. The development of FSII has seen it being a registered body under the charitable act of the Solomon Islands government, a legitimate voice representing the silent majority within the Solomon Islands.

Membership

FSII is a closed group with the current membership reaching 4,307 from all sectors of society within the Solomon Islands and internationally. Annual membership fees of SBD30.00 are required, though voluntarily. Membership criteria policy is in place; interested persons have to undergo background checks before admission to the page. There are policies in place for media to use information within the page. Members are literate Solomon Islanders with access to internet technology or the current smart phones (access internet).

Usage of FSII Page

FSII page is used exclusively to facilitate:

- Discussions of national issues that affect life of ordinary Solomon Islanders. National issues include politics, health, education, law and order usage of Solomon Islands fund for rural development etc. Discussions resulted in FSII producing media releases on issues of concern.
- Voluntarily service to national institutions or issues. Major activities includes the maintenance of Solomon Islands National Referral Hospital children's ward, facilitate discussions between the National Government (SIG) and Solomon Islands National Teachers' Association (SINTA) teachers salary re-leveling and currently working with parents of Solomon Islands students studying at overseas institutions, scholarship saga.
- Organisational fundraising drives to support FSII daily operations. This includes BBQs, leisure trips (supported by a local business member).

The usage of FSII page is very formal, guidelines were developed and members continuously reminded to respect other contributors. Information shared is well researched or firsthand information from specialised persons within the group.

Drivers of Usage

FSII members (ordinary Solomon Islanders and those within the public service) voice out disapprovals, concerns and solutions, on how the government continues neglecting holistic development. The perceived culture of silence, even though Solomon Islands as a sovereign state continues to be destroyed/looted by national leaders and people in authority, is a challenge that FSII felt needed total overhaul. Solomon Islanders want to be consulted about development.

FSII page, being an avenue where views and information are shared, means members are not coerced by authorities' rules and regulations, or being found and disciplined.

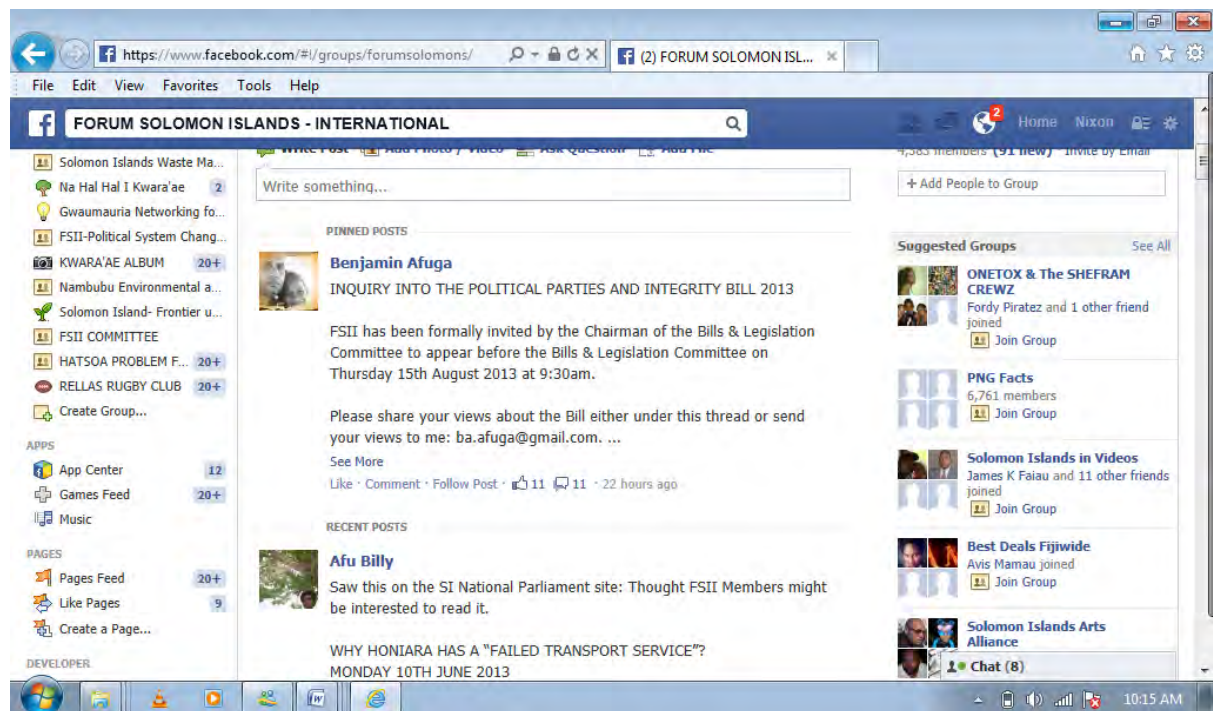
Members of FSII want to be heard loud and clear; they advocate for a total change to current corrupted practices within the government systems. The longing for positive and equitable development driven by the Solomon Islands government is currently paramount to the vibrancy of FSII.

Issues Suited to FSII as a Current Media

Solomon Islands uncertain political system in service delivery, tackling corruption, addressing national priority issues etc. is continuously highlighted in all media mediums. The FSII face book page continues to provide an avenue whereby constructive and vibrant debates on these issues exist. Mainstream media continues to work with FSII leadership in discussing and disseminating information about important development issues nationally, in daily media outlets.

FSII - How Cutting Edge?

FSII since its establishment continues to be heard throughout different media mediums. With the quality of information in the forum, it has an upper hand in sharing information and challenging public institutions to be more accountable for decisions and actions made. FSII capacity to engage with national institutions such as the police force (courtesy call to Royal Solomon Islands Police commissioner) the office of the Solomon Islands Prime Minister etc., indicates a serious organised group with agendas set to work with the government.



5.1.2 News Tips & Corruption Network [ANSI: Anti Corruption Network Solomon Islands]

ANSI is a registered organisation under the Charitable Act that continues to advocate against corruption in the Solomon Islands. Corruption continues to erode government service delivery, financial processes and other important service provided by the government. ANSI established a Facebook page named “News Tips & Corruption Network” which continuously updates members of corrupt deals, practices or issues on current media or with the government. Discussions on issues in this site are vibrant with educated views from members.

This page is a 'secret page' (can only be accessed via invitation) and continues to engage in very important national matters relating to the Solomon Islands.

Membership

The group was founded by a local lawyer and established an office in Honiara. There are currently 387 members; membership of the group includes voluntarily membership fees with different rates for members of the public according to status.

Usage of News Tips & Corruption Network Facebook Page

The page continuously updates and facilitates discussions on issues of corruption happening within the government machineries and the members of parliament. Discussions herein are educated and informed, commentaries were usually sent out to media outlets for publication. The purpose is to hold the government accountable for uninformed corruptive decisions.

Drivers of Usage

There is a perceived level of corruption in all sectors of governance in the Solomon Islands. Corruption is thought to have eroded away moral values and machineries of the government, resulting in inadequate service delivery, unreliable commitment to government obligations, no accountability to financial procedures etc. The need to create avenues for likeminded Solomon Islanders to combat corruption resulted in setting up of this page (refer to social media template, no. 32) for further details.

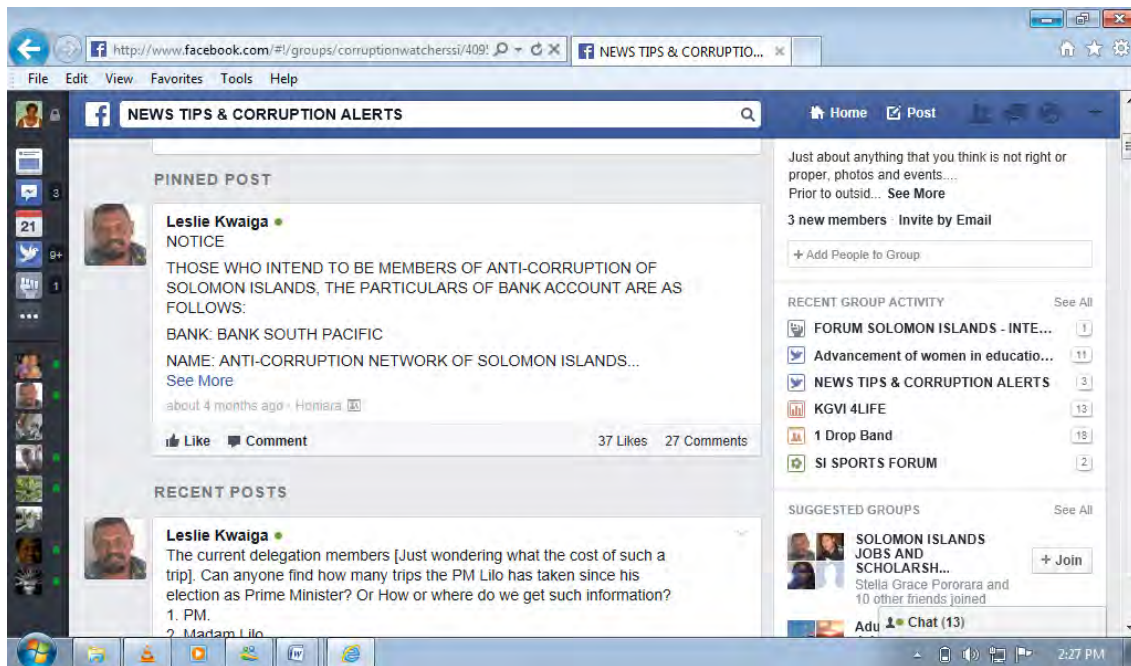
Issues Suited to ANSI as a Current Media

This page is not restricted to any issues; it deals with issues of corruption in all level of governance, important national issues, legislation inputs and all issues that could have effect on service delivery to Solomon Islanders.

News Tips and Corruption - How Cutting Edge?

This particular group are passionate advocates against corruption within the Solomon Islands. It consists of educated Solomon Islanders in well respected positions. The level of information gathering and analysis can be trusted, as issues are well researched before feeding to the general public or society through media outlets.

The group has taken steps to continue in advocating against corruption, now it is recognised by the government and contributes to important national bills before parliament committees. It is an avenue whereby like-minded Solomon Islanders can work towards eliminating corruption in government machineries.



5.1.3 Young Women in Parliament Solomon Islands

YWPSI is a group initiated by women working in the Solomon Islands National Parliament, who see the importance of advocating for women's development aspirations, and leadership in all sectors of society and politics. It is common knowledge that the Solomon Islands parliament (government) has little female representation. The voices of women on national issues are rarely heard or taken heed of. The formation of an organisation for aspiring young women leaders and their Facebook page, which deliberates on issues important to them and the Solomon Islands overall, is seen as a step in the right direction.

YWPSI have influence in national issues and have taken stage in the national parliament, where issues affecting the lives of ordinary Solomon Islanders were highlighted. An example was the "Honiara Short Bus Routes Commission of Inquiry", which affected lives of low income families in Honiara. This group continues to provide and share important aspect to bills and legislation development by providing an avenue for public consumption and inputs.

Membership

YWPSI Facebook page is a closed group, membership are mostly women and interested men, and is opened to all Solomon Islanders. Currently membership of the page reaches 180 individuals. Membership is mostly educated women and men with access to internet technology or smart phones.

Usage of YWPSI Facebook Page

YWPSI Facebook was used to post threads and comments on issues of national significance. Threads are on bills and legislations of the National Parliament by seeking comments or important deliberations of bills developed for debate and passing in parliament. The Commission of Inquiry such as the "Honiara short bus route" is an important issue of

national significance, and discussed in the page. Advancing women in political leadership is an important aspect of issues raised in the page. The electoral commissioner bill and temporary seat for women as members of parliament are a few examples of issues discussed in the page.

Drivers of Usage

An avenue whereby aspiring young women leaders can discuss and share information and network. Common practice of not heeding women's voice, participation in national leadership (being Member of Parliament) and other challenges faced by women has resulted in development of the page. The development of this page is an avenue to share and learn from each other. The lack of equal participation of women in the Solomon Islands National Parliament has triggered this organised young women's group.

Issues Suited to YWPSI as a Current Media

For this particular page, issues ranges from advocating and mentoring on women in leadership, particularly women in political leadership; developing young women leaders in the Solomon Islands. Having women's voice heard in development of bills and legislation in the country.

YWPSI - How Cutting Edge?

Through this Facebook page, influence on national laws (Bills and legislation) can materialise as this group of young women is closer to parliamentarians and could hold the power to influence certain decisions. Through YWPSI closer working ties with parliamentarians have taken major steps in influencing politicians' views. For example, the Honiara short bus route commission was an YWPSI initiative. Getting draft bills to ordinary citizens Solomon Islanders for comments and suggestions is a major step from past practices.

Members of this Facebook page are also members of other groups such as Forum Solomon Islands International.



5.1.4 Advancement of Women in Education and Leadership, Solomon Islands - AWELSI

AWELSI advocates for the equality of women and men in education and leadership. Currently the group has senior and mature women members and is driving the change theme. AWELSI advocate that equal participation of women in the highest decision making body in the Solomon Islands will result in positive development to all persons in the country.

The group planned major steps toward encouraging women to participate in the 2014 general election by drawing up its strategic directions. Apart from that, other important developments include the drafting of their constitution and intention to be registered under the Solomon Islands Charitable Act.

Membership

AWELSI page is an open page, accessible to all Solomon Islanders and interested persons. There are currently 626 members of AWELSI Facebook page. Members are educated Solomon Islanders of both gender, with access to internet and smart phones. A good number of members contributed ideas during discussions, which are constructive and informative as well.

Usage of AWELSI Facebook Page

The page used by members to network, share information and discuss issues of concern to women in the Solomon Islands. The tone of discussions on the site indicates passion and courage of women and AWELSI members for setting the scene for change at the national political level.

AWEISI page is used to update development of safe havens for survivors of violence at home especially for women. This page also provided an avenue whereby contributions from women on important government bills were heard and acted upon.

Drivers of Usage

Government and traditional media often shelved women's issues, there is no tangible plans to engage women at the national political level. Women are not given proper recognition and capacity development to cater for leadership at sectors within the country, though they have proven time and time again that they are respected partners in development.

The need for equal participation of women in all sectors of development, decision-making and their capacity to take leading roles in national development aspirations is recognised. Political recognition and the political will to involve women in political leadership is an essential platform of this group.

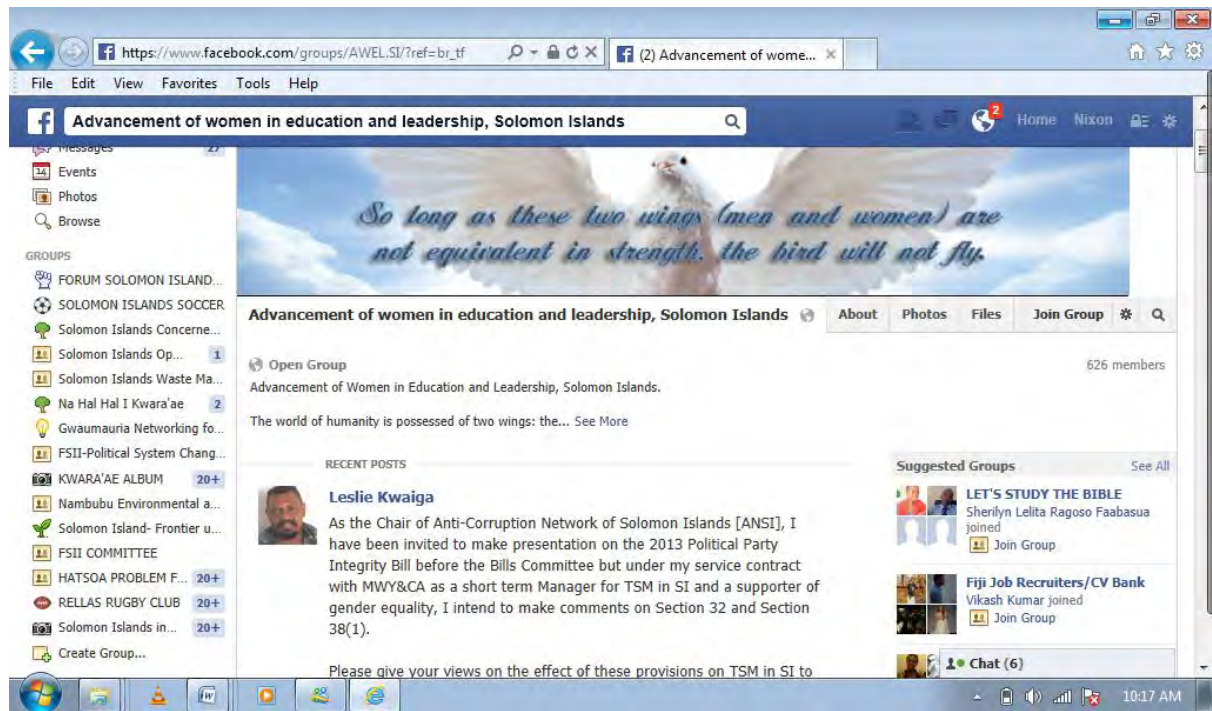
Issues Suited to AWELSI as a Current Media

Continuous advocating and networking for equality of women in all sectors of development in the Solomon Islands. Support for disadvantaged women such as survivors from violence, rural women development aspirations, leadership through highlighting and development of possible solutions/strategies nationally.

Rallying of support and membership from young women especially in schools to become members and be mentored to become future leaders.

AWELSI - How Cutting Edge?

AWEISI discusses issues that continue to disadvantage Solomon Islands' women. Issues range from education, leadership in general, violence against women and other important development matters of national interests. AWELSI Facebook page gather views and contributions from women from all walks of life, having access to internet and smart phones. The group consists of many highly educated Solomon Islands women working all sectors of the government and is well versed with issues facing the female population of the Solomon Islands. AWELSI page is gaining momentum and has organised (or applied?) to becoming a registered entity or organisation under the charitable Act.



5.1.5 Transparency Solomon Islands

TSI, a local Non Government Organisation (NGO), produced commentaries on a Facebook page. Content of the page consisted of commentaries on issues such as government service delivery, research reports and other important matters to curb corruption. Followers of the page were mostly professionals, academics and other interested persons. The page has 1,147 likes and commentaries are well researched.

Membership

Membership includes professionals, academics and interested Solomon Islanders working towards eliminating corruption from all sectors of the government. TSI Facebook page is an open group and anybody can be a member – they currently have 1,147 likes.

Usage of TSI Facebook Page

The TSI Facebook page is used mainly for corruption awareness and posting commentaries about issues of national interest. Members view commentaries, likes and little comments.

Drivers of Usage

Facebook as another avenue to inform all Solomon Islanders in fighting corruption; providing awareness to members on issues/decisions the government failed to address or delivered in an accountable and transparent manner. To educate Solomon Islanders to better understand be informed by and committed to fighting corruption.

Issues Suited to TSI as Current Media

Issues about national government, corruptive practices, decisions and actions which are not ethical, or that could have impact on the lives of Solomon Islanders.

TSI - How Cutting Edge?

TSI is an organisation fighting corruption and practices from the Solomon Islands government. It continues to work with Solomon Islands traditional and social (especially Facebook) media to update and communicate views on corruption in the Solomon Islands. TSI is a reliable source of information, which stakeholders in the country, media and rural populace trust. Through its ability to research and communicate with the media its findings informed the general public (Solomon Islanders).



5.1.6 Environment Concern Citizens of Solomon Islands

This Facebook page is set up to network environmentalist practitioners, academics and professionals in all sectors of Solomon Islands. The page shares information on environmental issues, concerns and possible solutions that are of national importance to Solomon Islands. With the current increase in membership, senior members are suggesting production of awareness materials quarterly. Current issues, including climate change, logging, and mining are issues which are discussed more. Information shared includes scholarships, research reports and developments.

Membership

Members of this page include environmental practitioners, academics, administrators and the general public who are interested in environmental issues. With current membership of 164 people and increasing, it is not yet popular.

Usage of ECCSI Facebook Page

ECCSI uses the page to share information, research and continues dialogue on environmental challenges such as climate change, logging, mining and other issues of national concern. The page networks Solomon Islands top scientists with professionals, academics and experts in different sectors of the country.

Discussions are useful and only a handful usually makes comments, most members only saw / read posts, but never comment.

Drivers of Usage

Continue to inform all sectors of the country about environmental challenges from natural resources exploitation or development. The need to network different individual academics and professionals to discuss, share and provide views on possible solution.

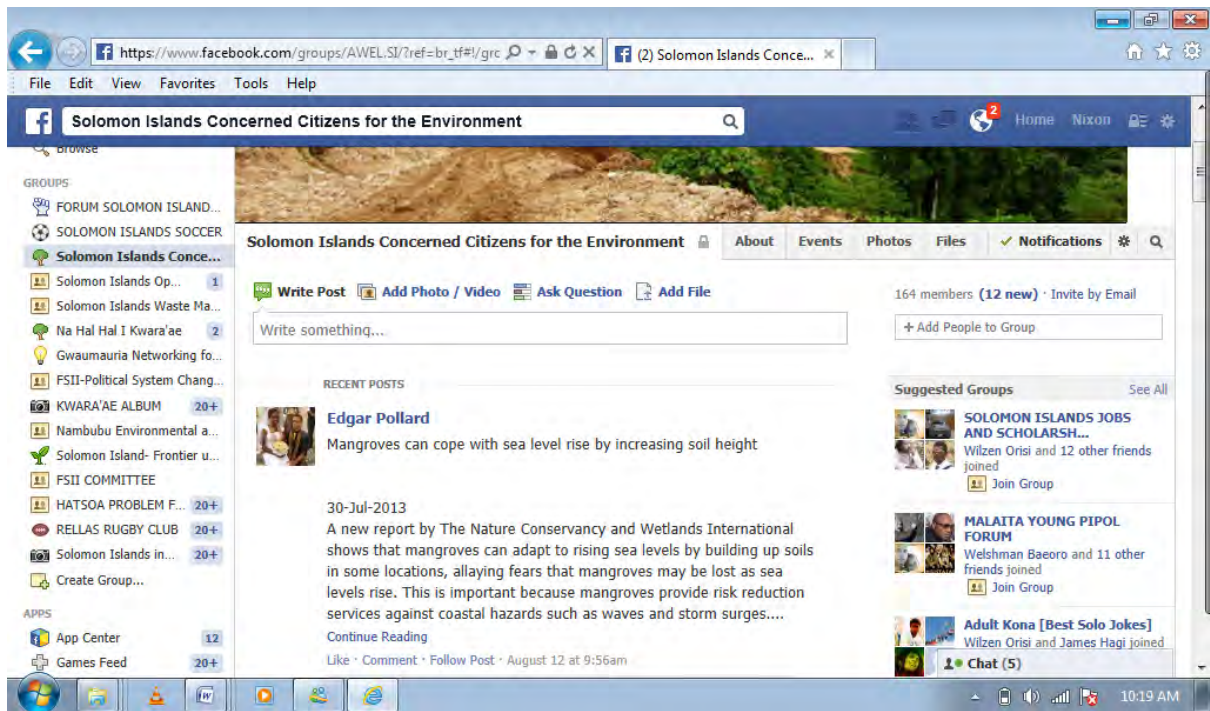
Issues Suited to ECCSI as a Current Media

Issues discussed in this page are of significance to current traditional and social media. Issues such as climate change and sea level rise, the extractive industry (in particular logging and mining). These issues are part of the fabric of Solomon Islands government and continue to provide foreign income to the country.

The current page has discussed possibilities of informing the general public without access to internet technology through traditional media or quarterly magazines.

ECCSI - How Cutting Edge?

ECCSI networks some of the Solomon Islands top scientists, practitioners and general public interest in the environment. The continuous sharing of research information and opportunities to further develop their capacity members' capacity are important aspect of this page. Information within this page appears trustworthy, as most members are academics and professionals within this peer group.



5.1.7 Na Hal Hal I Kwara'ae

NHHK page is a typical ethnic language group Facebook page developed to share cultural and custom knowledge. This particular page encourages the use of written language to communicate and share culturally significant wisdom, and to network with Kwara'ae individuals. Kwara'ae ethnic group is in Central Malaita, a large ethnic cultural group (in terms of population) in the Solomon Islands.

This page is set up to cover culture and custom affairs; there are no political debates or discussions here. Discussions are mainly driven by males. Female members usually pop in on topics that are interest to them, particularly commenting on images, publications or books about Kwara'ae.

Membership

Membership of the page is Kwara'ae people in particular, who speak and understand the language. It is comprised of all age groups, including women and men. Membership is either added by friends or individuals request to be added to the group.

Members of this group are inclusive of any Kwara'ae individual, both here and abroad.

Usage of NHHK Facebook Page

The use of this particular page is for self – education of Kwara'ae cultural values and customs to the current generation. It also includes use of grammar, definition of English words to Kwara'ae language, cultural concepts etc.

Drivers of Usage

Development of the page is for self-education of cultural and custom values of Kwara'ae. The slow eroding of culture, customs and language has prompted the usage of Facebook as a means to network and learn.

Issues Suited to NHHK as a Current Media

For this particular page, cultural education is important to people, who are encouraged to use social media as a facilitator to connect and educate themselves about important cultural matters and lifestyles.

NHHK - How Cutting Edge?

NHHK Facebook page is a regional ethnic page, focusing on Kwara'ae culture, and educating young people about norms, ethics and other important matters. The sharing of cultural values between young, learned individuals and young uninformed persons of Kwara'ae origin provides an informal learning platform. This sustains the knowledge and understanding of values that were never taught in the family or schools nowadays.

This learning however needs to be translated to other young generations in the village.



5.1.8 Waste Management Solomon Islands

WMSI is a social page set-up to constructively discuss waste management processes in the Solomon Islands. Highlights in the page include developments to curb waste in Honiara (Honiara is described as the dirtiest city in the Pacific), Gold Ridge waste tailing water discharge process into natural water systems and other national developments. The page is developed to share ideas and discuss experiences of others on processes to improve waste management.

This page is an open page, discussions can be viewed without being a member and membership is easily accessed.

Membership

Members of this page include professionals, academics and practitioners in the Solomon Islands and abroad. This page is accessible to everyone on Facebook. Members working in government institutions, researchers, lecturers are members to this page. Current total membership is 68.

Usage of WMSI Facebook Page

Upload of waste management images, process and important updates or contribution to waste management in Honiara and Solomon Islands. Discussions include waste in Honiara and how authorities should approach education of the general public and clean ups. Information sharing about waste continues to create discussions among members, though not many members contributed ideas.

Drivers of Usage

The continuous overlooking of waste management and processes in Honiara and the Solomon Islands. Waste is an important part of human, social, infrastructure and other forms of development. The page is an important tool in highlighting government's policy on waste management.

The site also encourages discussion and self education of existing methodologies of waste management process.

Issues Suited to WMSI as a Current Media

Update on the Gold Ridge mining company process on de-watering the existing tailing dam into natural water systems. Waste management processes currently developed by the ministry of Environment and Honiara city council, engaging consultants to provide technical advice.

WMSI - How Cutting Edge?

WMSI social blog provides an avenue to discuss and share ideas on how to improve waste management process in Honiara and Solomon Islands. This page includes members from the government authorities, who may use the information to further improve waste management policies. Information sharing about roles and responsibilities about government officer's plans to develop mechanism for waste management and reduction in Honiara.

Browser address bar: https://www.facebook.com/groups/AWEL.SU?ref=br_tf#/gpc

Page Title: **Solomon Islands Waste Management Social Blog**

Write something...

RECENT POSTS

Jonathan Dani
 Working on Water treatment plant at the tailings dam facility is currently ongoing. Expected time for dewatering should start on August.



Like · Comment · Follow Post · Share · July 26 at 4:04pm

3 people like this. Seen by 27

View 7 more comments

Alex Makini Good one... obviously the temptation to discharge into the is always there, but thanks to staffs from Environment and

Suggested Groups

- SOLOMON ISLANDS JOBS AND SCHOLARSH...**
Jackson Gege and 12 other friends joined
Join Group
- MARRIAGE and FAMILY.**
Edna Saenemua joined
Join Group
- Fataleka Forum**
Benjamin Afuga joined
Join Group
- Adult Kona [Best Solo Jokes]**
James Hagi and Wilzen Orisi joined
Join Group
- Solomon Islands e-Shopping**
Bennetto Gregorio and 8 other friends joined
Join Group

Chat (9)

System tray: 10:26 AM

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Citizen access to information in Vanuatu

Information sources and media consumption



May 2013


InterMedia

 International
Development
Australian Broadcasting Corporation

 Australian
AID 

Introduction

The **Citizen Access to Information in Vanuatu** study was designed to assess the information needs and media and communication habits of Vanuatu citizens, and their attitudes towards development issues in order to help the development, media and policy community better understand community needs and optimise their citizen engagement strategies in Vanuatu.

Specifically, the study focused on the following objectives:

- To assess the information needs and wants of Vanuatu citizens, identify information gaps and identify key sources of information on priority information issues.
- To examine media access, media consumption patterns and trust in media among different population subgroups and identify the key barriers to media access and use.
- To understand citizens' preferences for different media types, media formats and genres. This includes obtaining insights into media's unique strengths, perceived shortcomings and the extent to which they fulfil citizen's information needs.
- To explore citizens' perceptions of development aid and their attitude towards international organisations and entities working in Vanuatu, including AusAID.
- To gauge the impact of communication efforts related to civic participation and explore attitudes and behaviour related to domestic violence and land issues.

The study was based on a mixed-method approach and included two research phases:

- PHASE 1 consisted of a qualitative study, which involved 26 focus groups across the Shefa, Sanma, Penama and Malampa provinces. All focus groups were conducted between October and December 2012.
- PHASE 2 included a representative face-to-face quantitative survey, based on a random sample of 1,338 citizens aged 15 years and above, living in urban and rural areas of Shefa, Sanma, Penama, Malampa, Tafea and Torba. The survey used a multi-stage stratified random sampling design, based on provincial stratification. The sample of primary sampling units in each province was based on a random sampling procedure to ensure representation of the population living in those provinces in terms of age, education, socio-economic status and urban-rural split. The respondents were selected at random, based on the in-household recruitment. The selection of households was done by a random route method defined in the sampling plan. Weighting was applied to the survey results in order to replicate the national profile based on age, education and province. Please note, all bases cited in this report are unweighted.

Research reports for this study include:

- The main report, which covers the key findings of the study; and,
- Four topic reports on the media access and media use in Vanuatu, domestic violence, land issues and health issues.

This topic report (1/4) focuses on the citizen's INFORMATION SOURCES and their MEDIA CONSUMPTION.

This report is based on research commissioned by ABC International Development (ABC ID) and funded by the Australian Agency for International Development (AusAID). The findings and conclusions contained within are those of the authors and do not necessarily reflect positions or policies of ABC ID or AusAID.

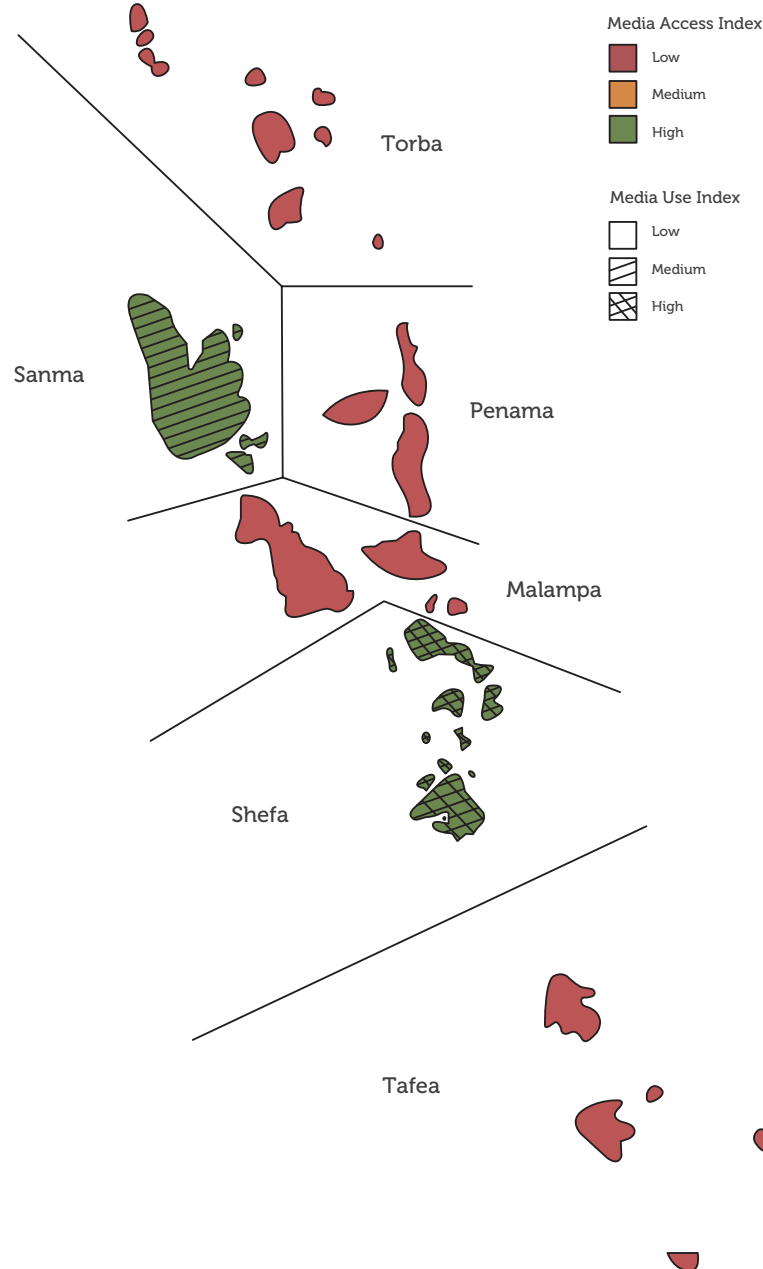
For more information about the Citizen Access to Information study, please contact:

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Associate Director
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tel. +44.207.253.9398

Media access and media use: NATIONAL level

The map below uses the Media Household Access Index and the Media Use Index to illustrate the diversity of media access and consumption across different provinces of Vanuatu.

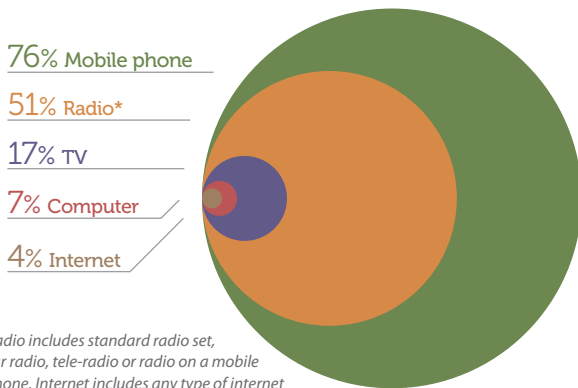
- The **Media Household Access Index** is calculated based on the household ownership of radio, TV, computer, internet and mobile phone. The index scores were averaged and divided into three categories of “low”, “medium” and “high”, representing different levels of household media access in a specific province. The higher the category, the more diverse the household media access in a specific province.
- The **Media Use Index** is based on the weekly use of radio, TV, internet, mobile phones and newspapers. The index scores were averaged and divided into three categories of “low”, “medium” and “high”. The higher the category, the higher the weekly use of these media sources in a specific province.



Information sources and media consumption: NATIONAL level

Household access to media devices

The share of all respondents who reported having the device in their household in a working order

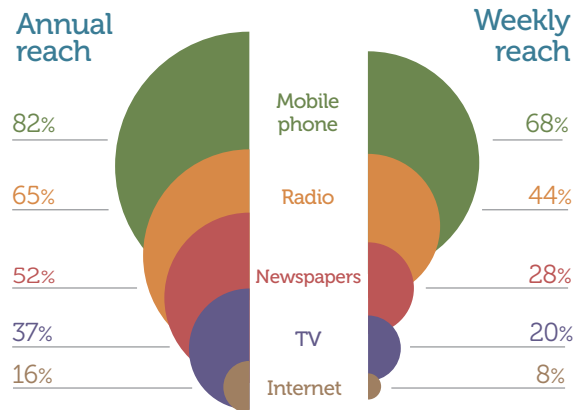


* Radio includes standard radio set, car radio, tele-radio or radio on a mobile phone. Internet includes any type of internet access including access on a mobile phone.

Base: 1,338 respondents, 15+

Media use

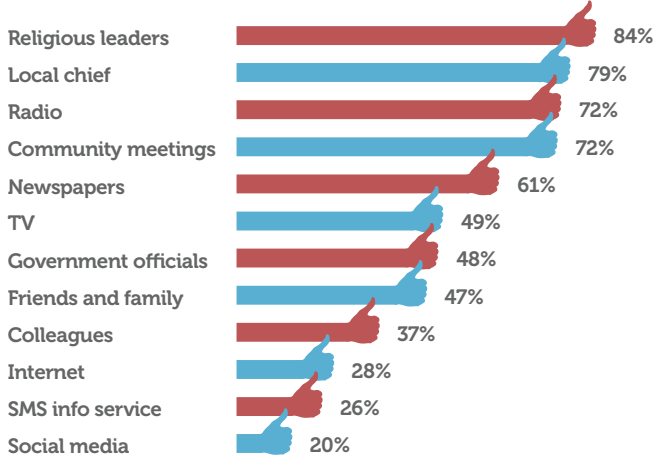
The share of all respondents who used the source in the past week/year



Base: 1,338 respondents, 15+

Trust in information sources

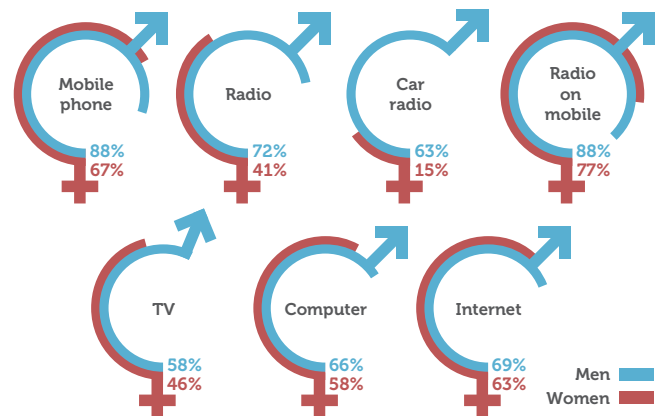
The share of all respondents who find the source trustworthy



Base: 1,338 respondents, 15+

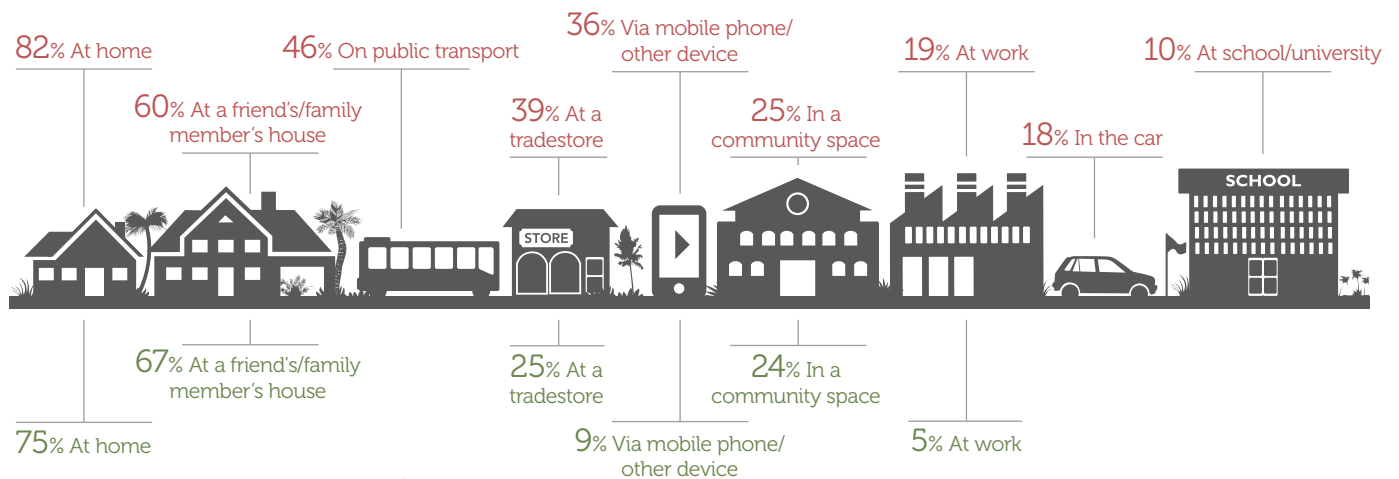
Media control

The share of men and women who have the final say about the use of media devices in the household



Base: 1,338 respondents, 15+

Locations of radio listening



Locations of TV viewing¹

Base: 616 weekly radio listeners, 15+; 253 weekly TV viewers, 15+

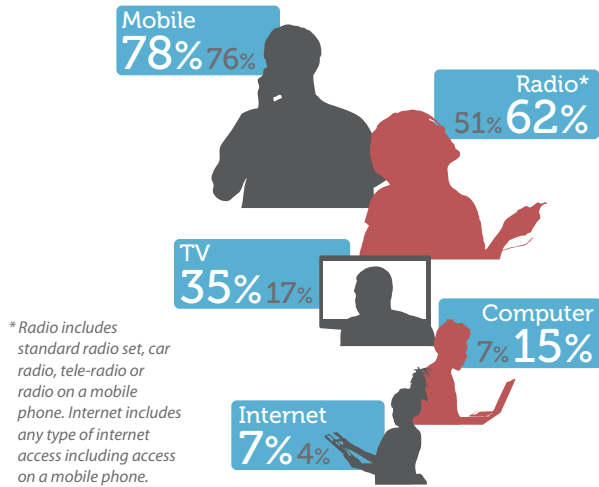
¹ Please note: While the respondents were asked a question regarding the locations where they watch television, their answers may have also included their viewing of recorded videos and clips.

Media landscape: SHEFA province

Household access to media devices

The share of respondents who reported having the device in their household in a working order

■ National average figure is displayed in dark grey colour

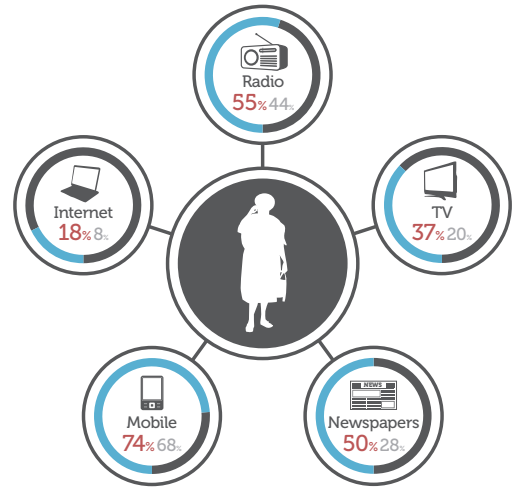


Base: 406 respondents in Shefa, 15+

Weekly media use

The share of respondents who used the source in the past week

■ National average figure is displayed in light grey colour

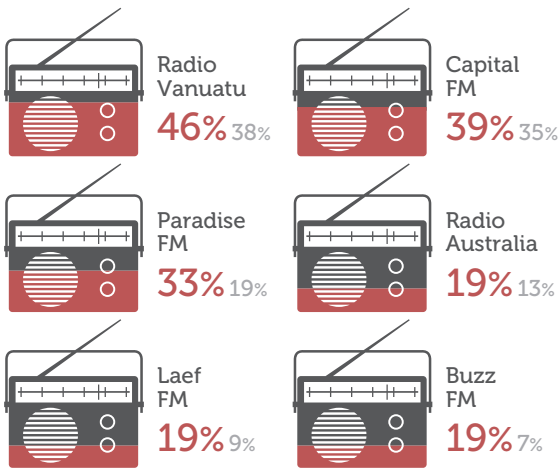


Base: 406 respondents in Shefa, 15+

Most popular radio stations

The share of respondents who listened to the station in the past week

■ National average figure is displayed in light grey colour

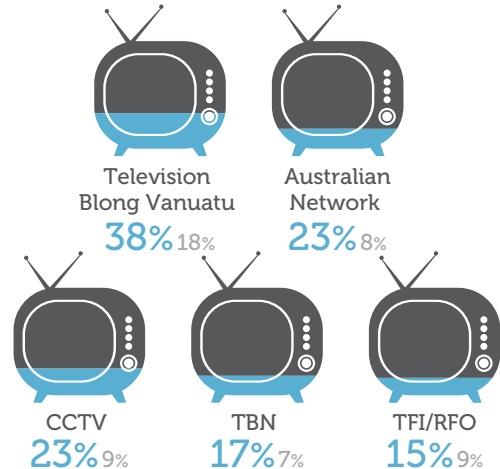


Base: 406 respondents in Shefa, 15+

Most popular TV stations

The share of respondents who watched the station in the past week

■ National average figure is displayed in light grey colour

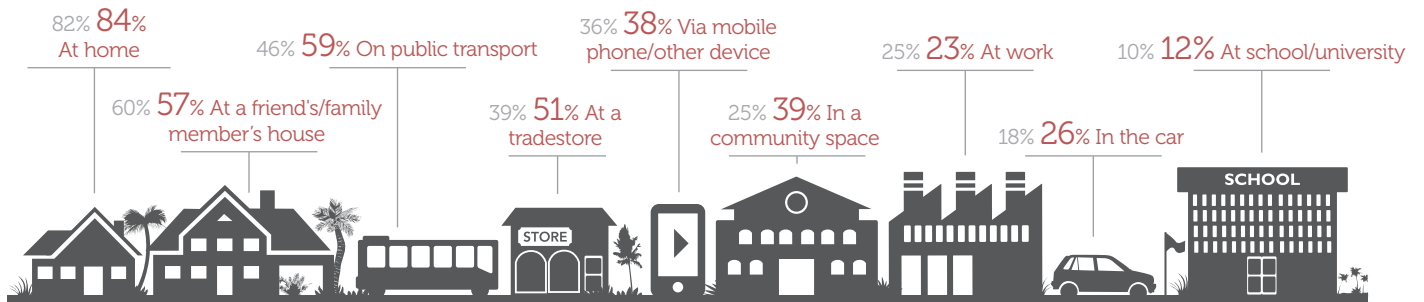


Base: 406 respondents in Shefa, 15+

Locations of radio listening

The share of weekly radio listeners who listen to the radio at each location

■ National average figure is displayed in light grey colour



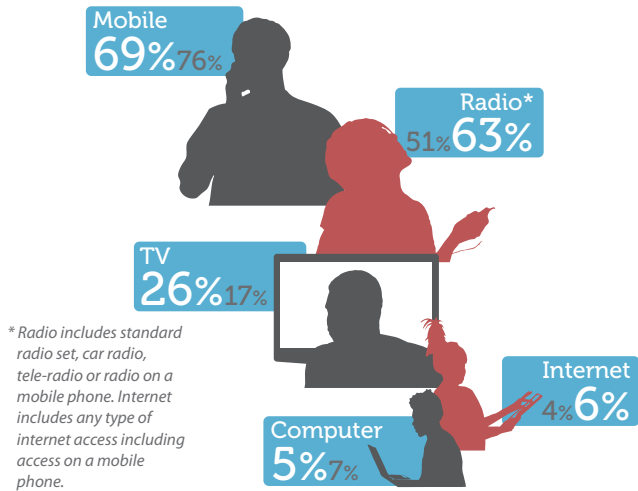
Base: 225 weekly radio listeners in Shefa, 15+

Media landscape: SANMA province

Household access to media devices

The share of respondents who reported having the device in their household in a working order

■ National average figure is displayed in dark grey colour



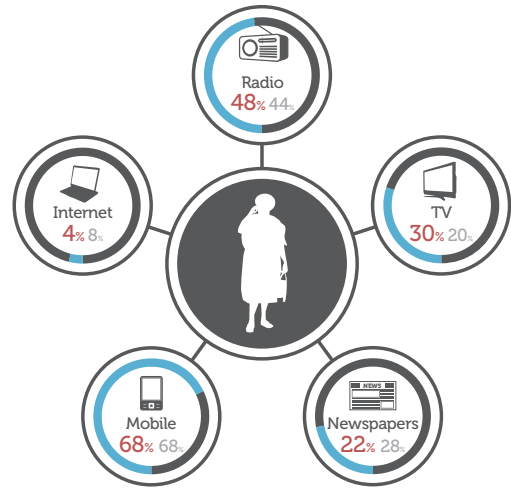
* Radio includes standard radio set, car radio, tele-radio or radio on a mobile phone. Internet includes any type of internet access including access on a mobile phone.

Base: 244 respondents in Sanma, 15+

Weekly media use

The share of respondents who used the source in the past week

■ National average figure is displayed in light grey colour

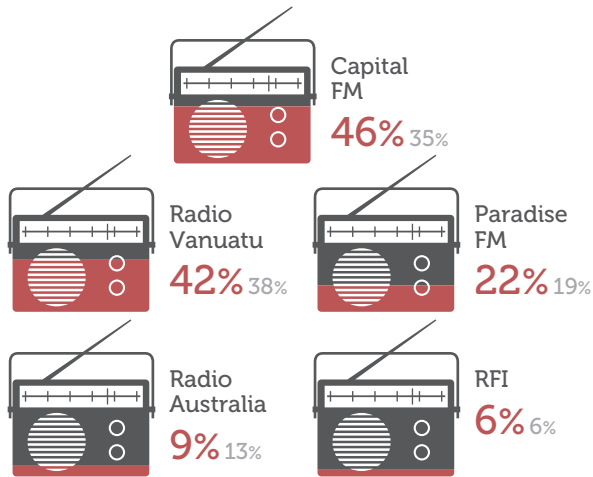


Base: 244 respondents in Sanma, 15+

Most popular radio stations

The share of respondents who listened to the station in the past week

■ National average figure is displayed in light grey colour

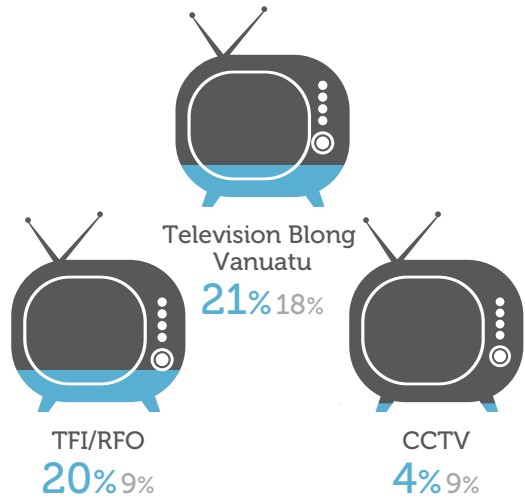


Base: 244 respondents in Sanma, 15+

Most popular TV stations

The share of respondents who watched the station in the past week

■ National average figure is displayed in light grey colour

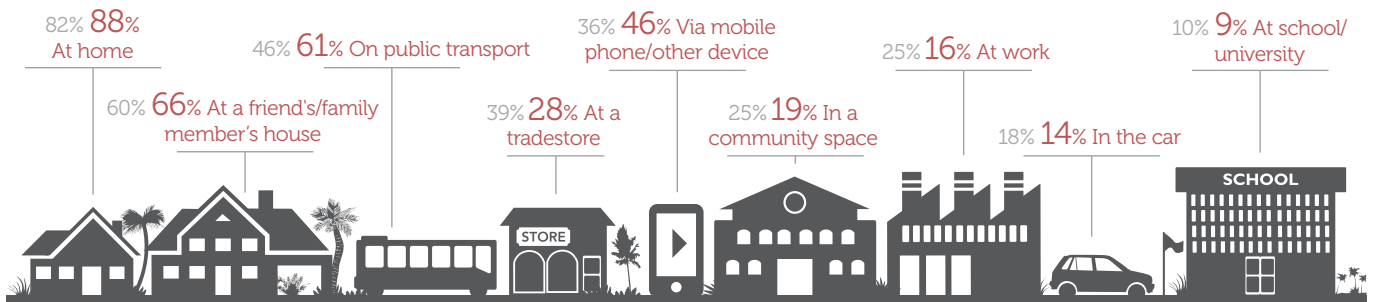


Base: 244 respondents in Sanma, 15+

Locations of radio listening

The share of weekly radio listeners who listen to the radio at each location

■ National average figure is displayed in light grey colour



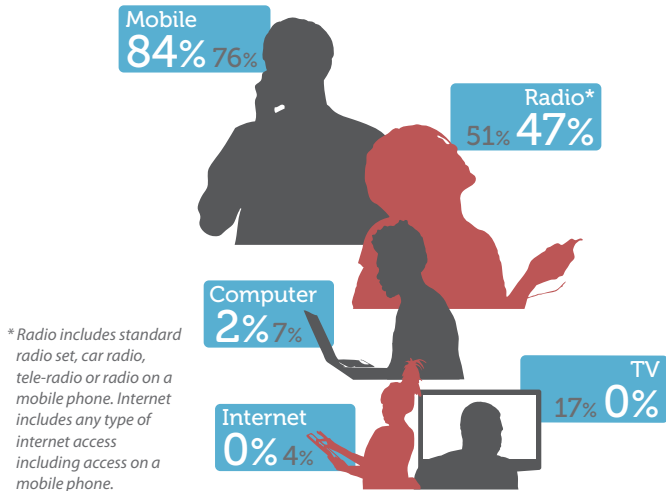
Base: 129 weekly radio listeners in Sanma, 15+

Media landscape: MALAMPA province

Household access to media devices

The share of respondents who reported having the device in their household in a working order

■ National average figure is displayed in dark grey colour



Base: 182 respondents in Malampa, 15+

Weekly media use

The share of respondents who used the source in the past week

■ National average figure is displayed in light grey colour

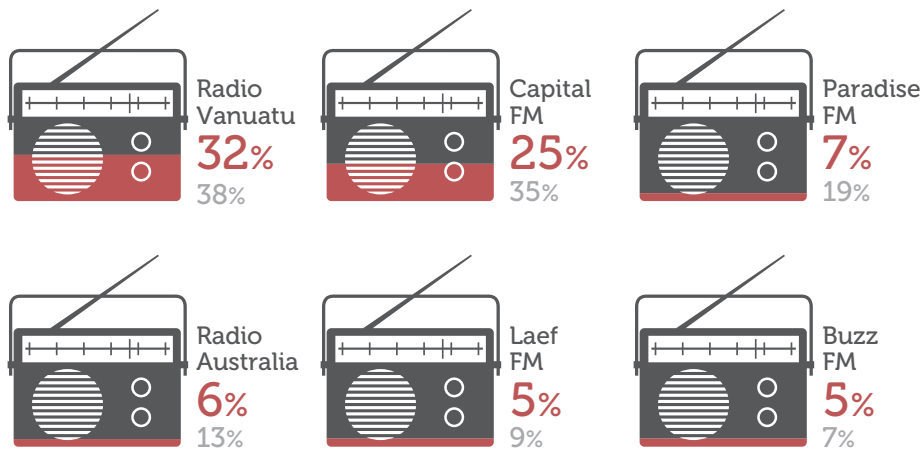


Base: 182 respondents in Malampa, 15+

Most popular radio stations

The share of respondents who listened to the station in the past week

■ National average figure is displayed in light grey colour



Base: 182 respondents in Malampa, 15+

Most popular TV stations

The share of respondents who watched the station in the past week

■ National average figure is displayed in light grey colour

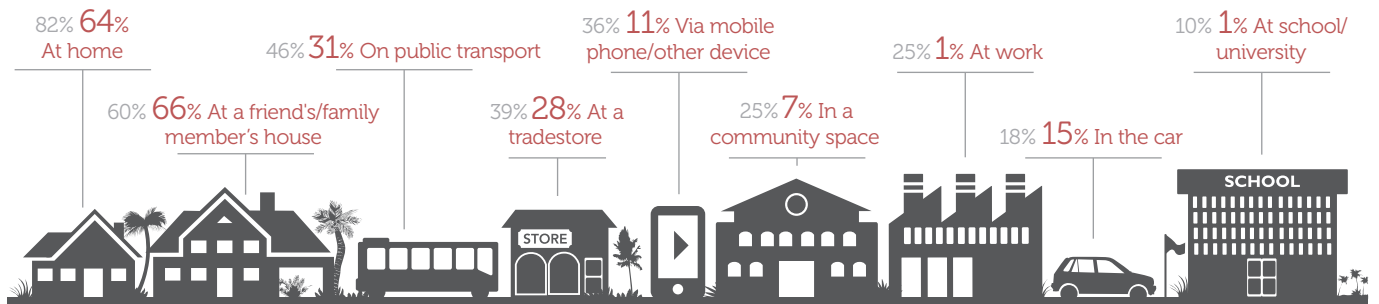


Base: 182 respondents in Malampa, 15+

Locations of radio listening

The share of weekly radio listeners who listen to the radio at each location

■ National average figure is displayed in light grey colour



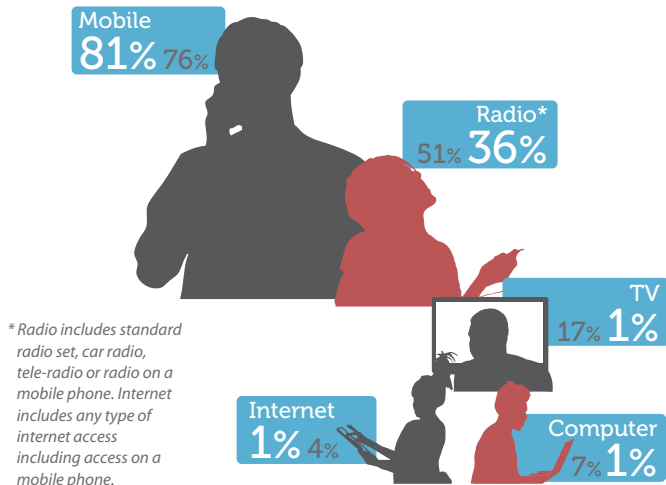
Base: 66 weekly radio listeners in Malampa, 15+

Media landscape: PENAMA province

Household access to media devices

The share of respondents who reported having the device in their household in a working order

■ National average figure is displayed in dark grey colour



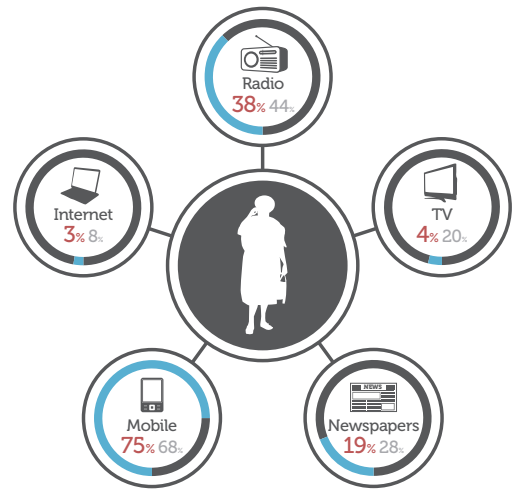
* Radio includes standard radio set, car radio, tele-radio or radio on a mobile phone. Internet includes any type of internet access including access on a mobile phone.

Base: 171 respondents in Penama, 15+

Weekly media use

The share of respondents who used the source in the past week

■ National average figure is displayed in light grey colour

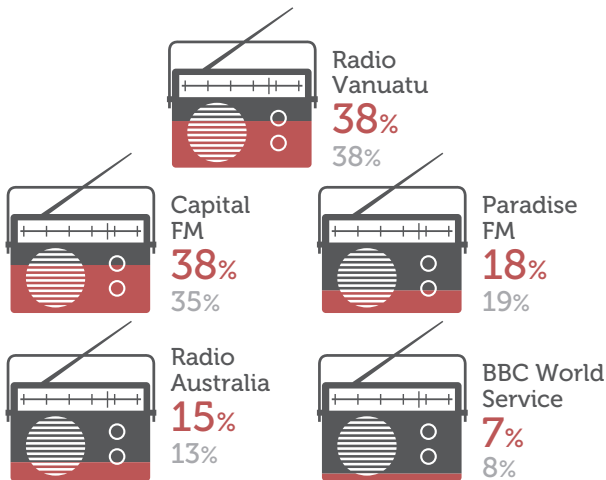


Base: 171 respondents in Penama, 15+

Most popular radio stations

The share of respondents who listened to the station in the past week

■ National average figure is displayed in light grey colour

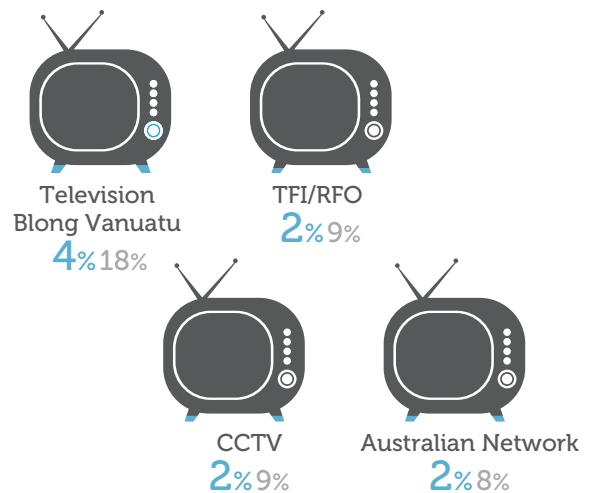


Base: 171 respondents in Penama, 15+

Most popular TV stations

The share of respondents who watched the station in the past week

■ National average figure is displayed in light grey colour

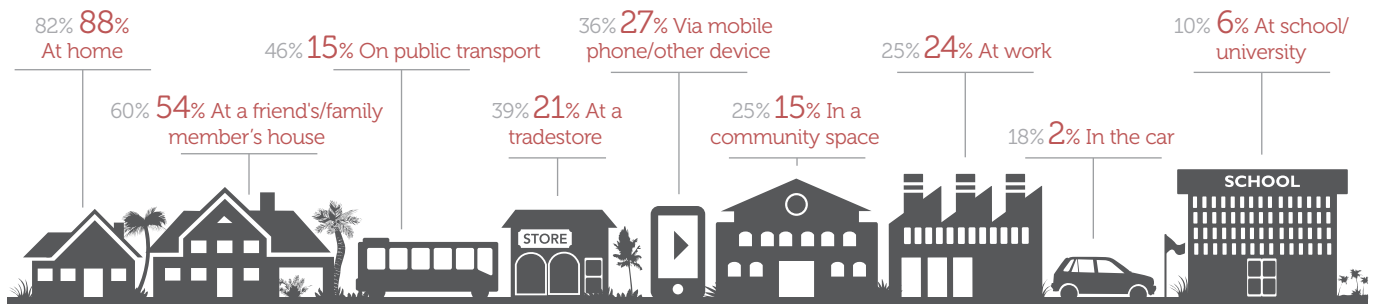


Base: 171 respondents in Penama, 15+

Locations of radio listening

The share of weekly radio listeners who listen to the radio at each location

■ National average figure is displayed in light grey colour



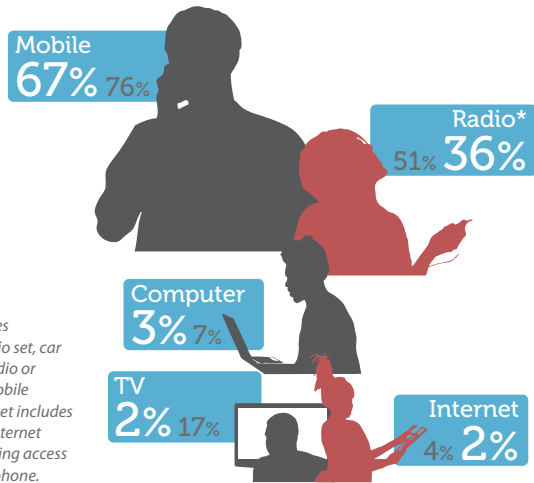
Base: 67 weekly radio listeners in Penama, 15+

Media landscape: TAFEA province

Household access to media devices

The share of respondents who reported having the device in their household in a working order

■ National average figure is displayed in dark grey colour



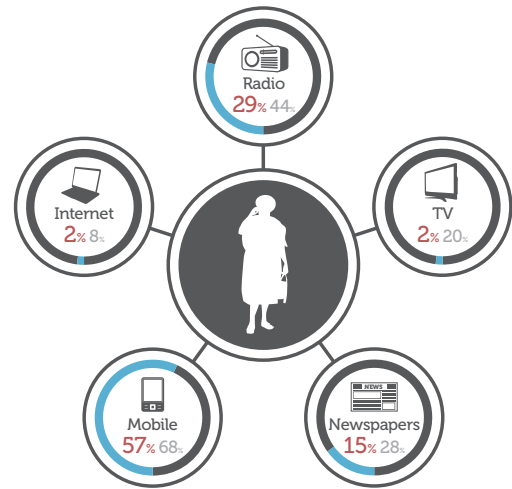
* Radio includes standard radio set, car radio, tele-radio or radio on a mobile phone. Internet includes any type of internet access including access on a mobile phone.

Base: 181 respondents in Tafea, 15+

Weekly media use

The share of respondents who used the source in the past week

■ National average figure is displayed in light grey colour

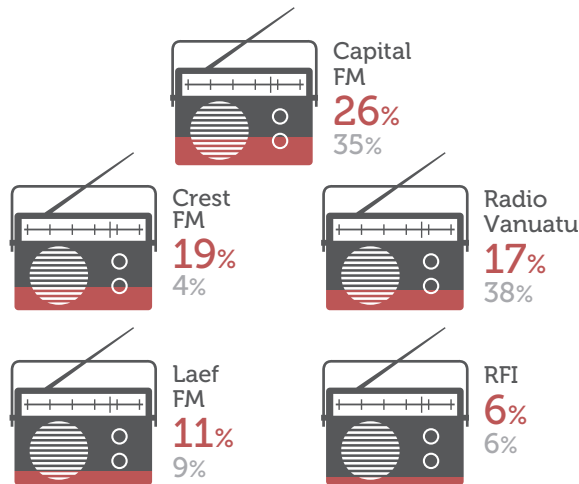


Base: 181 respondents in Tafea, 15+

Most popular radio stations

The share of respondents who listened to the station in the past week

■ National average figure is displayed in light grey colour

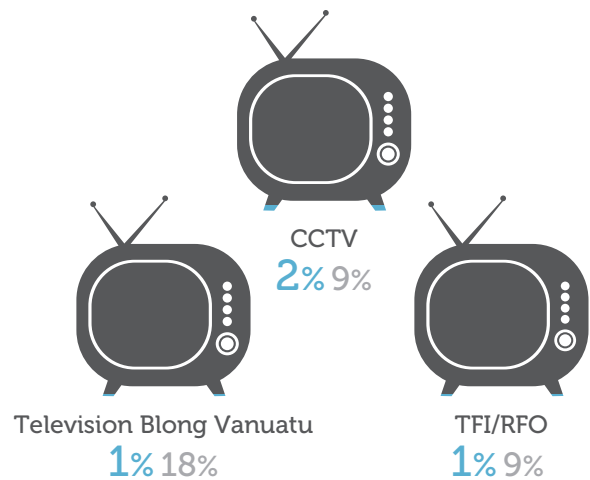


Base: 181 respondents in Tafea, 15+

Most popular TV stations

The share of respondents who watched the station in the past week

■ National average figure is displayed in light grey colour

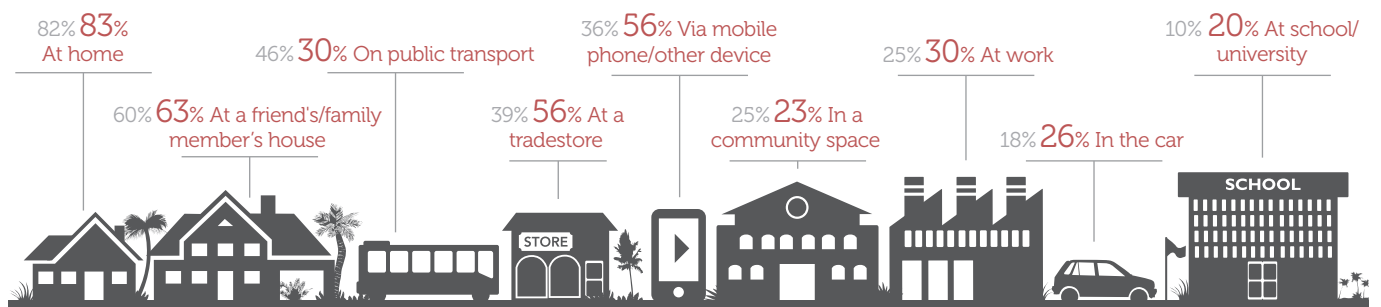


Base: 181 respondents in Tafea, 15+

Locations of radio listening

The share of weekly radio listeners who listen to the radio at each location

■ National average figure is displayed in light grey colour



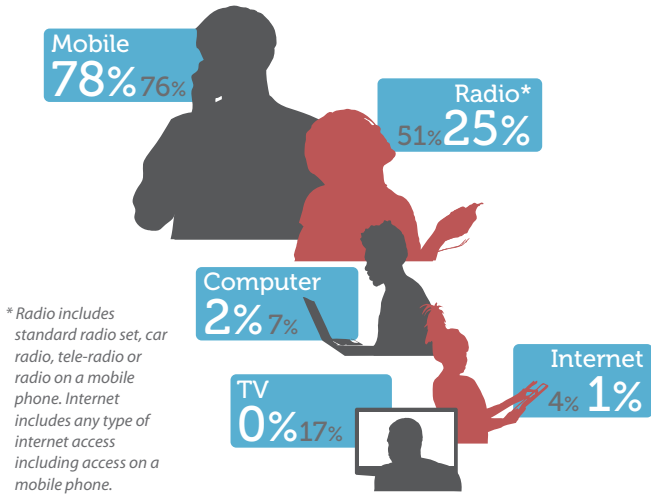
Base: 65 weekly radio listeners in Tafea, 15+

Media landscape: TORBA province

Household access to media devices

The share of respondents who reported having the device in their household in a working order

■ National average figure is displayed in dark grey colour

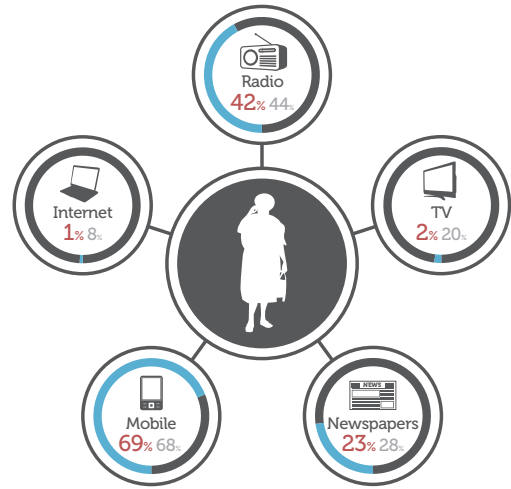


Base: 154 respondents in Torba, 15+

Weekly media use

The share of respondents who used the source in the past week

■ National average figure is displayed in light grey colour

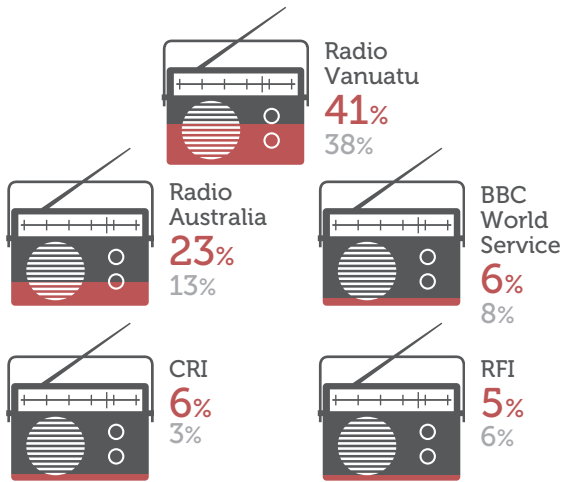


Base: 154 respondents in Torba, 15+

Most popular radio stations

The share of respondents who listened to the station in the past week

■ National average figure is displayed in light grey colour

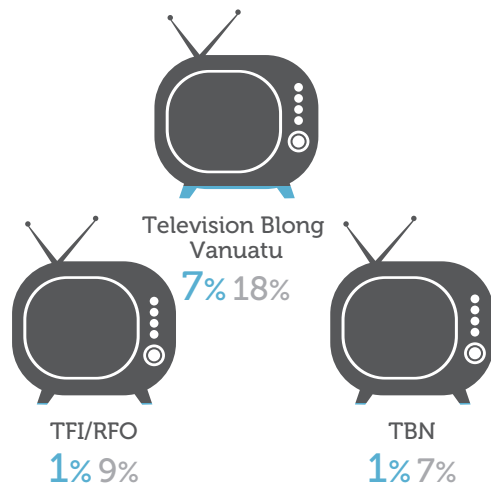


Base: 154 respondents in Torba, 15+

Most popular TV stations

The share of respondents who watched the station in the past week

■ National average figure is displayed in light grey colour

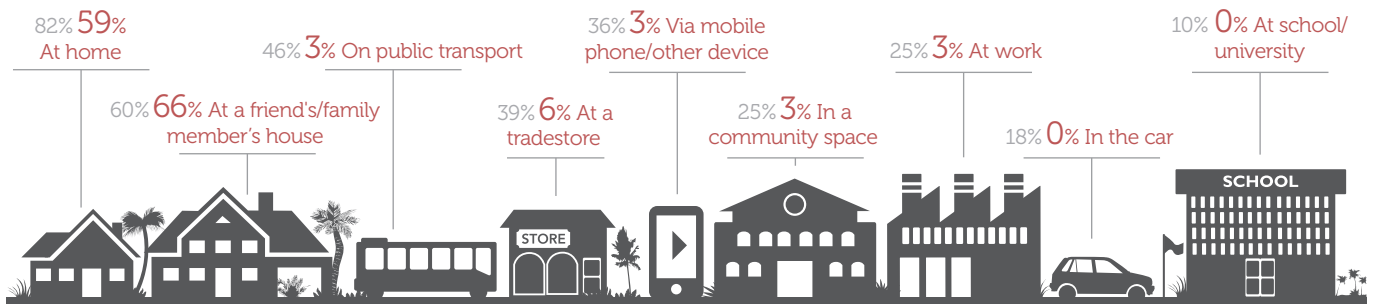


Base: 154 respondents in Torba, 15+

Locations of radio listening

The share of weekly radio listeners who listen to the radio at each location

■ National average figure is displayed in light grey colour



Base: 64 weekly radio listeners in Torba, 15+

About InterMedia



InterMedia is an independent non-profit research centre, providing insights-driven research in developing countries. InterMedia's mission is to deliver research and advice to foundations, bi-lateral and multi-lateral agencies and organisations committed to freedom of expression, the power of an informed citizenry, and the liberating potential of media and technology. InterMedia conducts applied research, technical training and knowledge sharing workshops globally.

Clients include AusAID, ABC International Development, BBC World Service, The Bill & Melinda Gates Foundation, Deutsche Welle, euronews, Polish Radio, Population Reference Bureau, Popular Engagement Policy Lab, Radio Netherlands, Search for Common Ground, Sesame Workshop, Small Media Foundation, UNDP, UNESCO, USAID, U.S. Department of State, The World Bank and major U.S. public international broadcasters.

In 2010, InterMedia created AudienceScapes, an integrated online research-based knowledge centre for the international development community focusing on media and communications and their impact on development.

InterMedia website:
www.intermedia.org

AudienceScapes website:
www.audiencescapes.org

About ABC ID



ABC International Development is the international development branch of Australia's national public broadcaster, the Australia Broadcasting Corporation (ABC). It offers support, advice and expertise to communications and media organisations in the Asia-Pacific region and globally. Based in Melbourne, Australia, ABC International Development has designed and delivered communication and media initiatives to support development objectives with a presence in Cambodia, Papua New Guinea, Vanuatu and the Solomon Islands.

ABC International Development's research focuses on generating insights and impact assessments on Communications for Development and Media Development programs implemented across the Asia-Pacific region. The focus of the research is on monitoring and evaluation with a view "towards understanding and improving", taking into consideration the local context and sustainability. The insights and impact team works with local staff and a range of partners locally to ensure capacity building, sustainability and local relevance.

ABC ID website:
<http://www.abcinternationaldevelopment.net.au/>

About AusAID



The Australian Agency for International Development (AusAID) is the Australian Government agency responsible for managing Australia's overseas aid program. AusAID is an Executive Agency within the Foreign Affairs and Trade portfolio and reports to the Minister for Foreign Affairs.

The fundamental purpose of Australian aid is to help people overcome poverty. This also serves Australia's national interests by promoting stability and prosperity both in our region and beyond. Effort is focused in areas where Australia can make a difference and where the resources can most effectively and efficiently be deployed.

AusAID provides advice and support to the Minister for Foreign Affairs on development policy, and plans and coordinates poverty reduction activities in partnership with developing countries. AusAID leads and coordinates Australia's responses to humanitarian disasters and represents Australia in international development forums. AusAID is strongly committed to evaluating and improving Australia's aid program and to collecting, analysing and publishing development data and other information. AusAID's head office is in Canberra. AusAID also has representatives in 37 Australian diplomatic missions overseas.

AusAID's website:
www.ausaid.gov.au/

