



PNG Citizen Perceptions of Governance and Media Engagement Report 2019

Contents

Acronym glossary	2
Caveat.....	3
Executive summary	4
Background, research objectives and methodology	8
Citizen perceptions of governance in PNG.....	9
The changing media landscape – the past 5 years	21
Overall media access, usage and trust	24
Detailed findings on media consumption habits	31
Cross-cutting issues	43
Methodology	50
References	53

Acronym glossary

DCP – Decentralisation and Citizen Participation

DCPP – Decentralisation and Citizen Participation Partnership

FGDs – Focus group discussions

GSMA – Global System for Mobile Communications Association

MDI – Media Development Initiative

MP – Member of Parliament

NCD – National Capital District

NICTA – National Information and Communications Technology Authority

NBC – National Broadcasting Corporation

NGO – Non-governmental Organisation

PGK – Papua New Guinea Kina

PNG – Papua New Guinea

PSU – Primary Sampling Unit

TV – Television

WHP – Western Highlands Province

WNB – West New Britain

1. Caveat

This report presents a combination of key insights from the quantitative and qualitative studies that were concurrently conducted between 3rd April 2019 and 11th June 2019. The quantitative survey provides an overview of citizen perceptions from urban, rural and peri-rural areas across six provinces in Papua New Guinea (PNG). The data was collected through a paper-based survey. The qualitative phase of the research sought a nuanced understanding of the attitudes and opinions of a small group of urban based citizens of PNG. It comprised of focus group discussion-based research facilitated by a moderator posing a series of open-ended interview questions.

Each component of the research offers insights into governance and media engagement that originate from different issues and contexts and varying sampled groups of citizens in different provinces. Where appropriate, the report identifies areas of overlap across quantitative (survey) and qualitative (focus group discussion) findings. However, the insights obtained from both are supplementary (rather than iterative and/or correlational) towards creating a broad picture of citizen perceptions of governance and media engagement. Given the methodological differences across both the quantitative and qualitative components of research and the respective nature of their inquiries, findings from both studies should not be unequivocally conflated.

2. Executive summary

The 2019 PNG Citizen Perceptions of Governance and Media Engagement Study* aims to identify citizen attitudes and perceptions of PNG governance, citizen engagement with social and political issues, and understand where citizens are accessing information and how they are consuming media.

This report includes findings from a quantitative survey of PNG citizens across six provinces: Central, Morobe, Western Highland Province (WHP), West New Britain (WNB), West Sepik, and Manus, with a sample of 1,539 respondents. Gender was recorded by sight by the interviewer and not asked directly. There was roughly an equal portion of males and females sampled in this survey.

These findings are presented alongside the findings of a qualitative research study comprised of twelve focus group discussions (FGDs). The focus groups were comprised of males and females aged 18 to 55 from urban locations in PNG (Port Moresby, Mt Hagen, Lae, Kimbe, Vanimo, and Lorengau).

The entire study was conducted at a time of ministerial transition with former Prime Minister, Peter O'Neill, leaving office towards the end of the survey period.

2.1 Citizens' perceptions of governance

The study revealed general mistrust and dissatisfaction with government at the national level and a sense that the country is heading in the wrong direction. Key issues driving these perceptions include concerns around corruption and the misuse of public funds, poor leadership performance, poor economic performance and poor delivery of basic government services. Distinct local issues were evident across each of the provinces surveyed, with poor infrastructure, health and law and order concerns common across all provinces. Further to the above, respondents highlighted problems around personal safety with 52% of those surveyed indicating that crime and violence relating to domestic violence, sexual assault, and drug/alcohol-fuelled street crime, has worsened over the last few years. Those living in urban areas more commonly perceived increases in violence relative to rural/remote zones (60% vs 49%).

While citizens generally regard provincial and local level government performance to be significantly better than that of the national government, the research indicated that there is opportunity for improvement. It should be noted that in PNG, there is general public scepticism over the leadership qualities of most leaders at all levels, who are afforded low levels of trust and respect. Church leaders remain the exception to this overarching trend in public sentiment.

The qualities of a good leader as identified by the FGD participants are as follows: inspires confidence and trust, exercises self-control, Christian or operates within Christian values, is humble, is a good listener, is objective, patient, and kind, has a vision (goals and objectives), is transparent and honest, is not corrupt, makes good decisions based on knowledge, information, and experience, and delivers on promises.

* The study was commissioned by Australian Broadcasting Corporation International Development (ABCID) through the Media Development Initiative (MDI) grant in support of the PNG-Australia Partnership for Improved Decentralisation and Service Delivery.

2.2 Citizens' voice and influence on decision making

The research revealed that while perceived citizen influence improves at more local levels of government, very few citizens feel they have the power to exert much influence on government decision making at any level. Some citizen groups were consistently found to have less 'voice' and influence over decision making, including women, those with less education, those living under greater financial hardship, and citizens living outside urban areas. Notably, women in the survey were less likely than men to agree that women were free to express their opinions (58% agreement for women vs 76% for men). This evidence is corroborated by findings from the FGD, where the general sentiment amongst women is that their freedom of expression outside family is impeded.

The results revealed a high level of recognition of the importance of participating in democracy and participating in civic engagement. 85% of survey respondents agreed or strongly agreed that it is important to participate in elections and vote and 84% that they were able to vote for their preferred candidate in the last election. However, a majority of citizens are sceptical that the outcomes of elections have any discernibly positive impact on their community.

Amongst the most dominant methods of grassroots engagement is discussion with community elders, with whom 57% of respondents reported consulting within the last 12 months, followed by church leaders (55%) and ward councillors (43%).

2.3 Media access and consumption

The report offers granular data on media access, trust, and consumption patterns at the national level, across province and by key demographic sub-segments. The survey showed that mobile phone and internet access and usage have increased significantly in the last five years. While smart phone ownership and internet access has increased overall, some groups remain disadvantaged when it comes to digital access, namely residents outside of urban areas, women and older citizens (45 years and over).

Newspaper and radio consumption have decreased slightly relative to findings from the 2014 Citizen Access to Information in Papua New Guinea survey (from 56% to 53% in weekly use of newspapers and 53% to 50% for radio), while television consumption has remained steady. This decline can be attributed to the increased cost of newspapers and lack of access to radio due to poor reception or lack of operation in an area.

Within urban localities, the survey findings highlighted two distinct audience segments; there were consumers who were more predisposed to read, listen or watch traditional media (majority of sampled respondents), and a growing minority of digitally-enabled consumers who were more inclined to curate what they engage with predominantly across new media platforms like social media and the internet (mostly younger citizens under 25 years).

TV consumption

Sixty per cent of respondents reported watching television at least occasionally. News and current affairs are by far the preferred programming citizens consume followed by sports and movies. Specifically, men reported a stronger preference for news, sports, and documentaries, whilst women preferred TV drama. The most popular TV channels amongst respondents were TvWan, EMTV, and Kundu/NBCTV.

Radio consumption

Three quarters of respondents reported listening to radio from time to time, with 50% tuning in at least weekly. Mobile phones are the most popular device for radio listening (69%), followed by radio set/receiver (54%). Ninety three per cent of reported radio listeners prefer the news, while 85% cited music as their preferred program type. NBC and Yumi FM are tied as the radio channels having the highest proportion of listenership amongst respondents (42%). NBC National news and NBC Government Talkback were cited as the top two most listened to programs on a weekly basis.

Newspaper consumption

The survey indicated that over half of PNG adults (53%) read the newspaper weekly. The most popular newspaper is *The National* (56% weekly reach), followed by *Post Courier* (41% weekly reach). Apart from cost, low levels of literacy continue to challenge greater newspaper consumption.

Mobile and digital media

Mobile phone usage differs considerably across provinces, with West New Britain and Morobe reporting the highest proportion of non-mobile users (32% and 30% respectively). Of active mobile phone users, 94% of respondents use it primarily for phone calls during the week, followed by sending and receiving text (90%). In terms of internet usage, 43% of survey respondents reported using the internet at least occasionally, with only 10% including the internet as part of their daily media consumption. Most internet users are social media users, with Facebook being the most popular platform (93% of respondents who use the internet weekly use it for Facebook). While women are less likely to use the internet as frequently as men, active female users are more likely to go online for a range of diverse activities such as file sharing (70% vs 56% for men) and applying for jobs (40% vs 28% for men).

Trust in media

The church stands out as the single most trustworthy source of information for most citizens. The next most trusted information sources are traditional media, specifically newspapers (80% rated it as very or quite trustworthy), radio and television. Social media platforms were generally not regarded as trustworthy, with only 39% of respondents classifying the platform as very or quite trustworthy. As an overarching point, citizen respondents spoke about journalism as a trusted and respected profession in PNG.

2.4 Cross-cutting issues

The research explored cross-cutting issues including women's influence on and participation in decision making, and issues for people with a disability. Neither of these issues emerged spontaneously in the qualitative FGDs. However, when prompted, the research confirmed that gender inequality is perceived as a major issue in PNG with concerns on people with disabilities regarded as equally salient. More than half of surveyed citizens identified as experiencing moderate household financial hardship.

Gender issues

Across the board, women reported less freedom to voice their opinions, less knowledge across important social issues, and less access to media across the board. The latter point reinforces a greater reported reliance of women on word of mouth sources of information. The survey showed that women have poorer perceptions of governance in PNG than men and are more dissatisfied with government performance at the national, provincial and district levels. In addition to the above, the FGD sessions showed that women find it more difficult than their male counterparts to access education services and police help.

People with disabilities

The survey also showed that people with a disability are more likely to be dissatisfied with the government and have less opportunity to contribute to decision-making. The key issues for these citizens relate to the provision of government services, including access to medical care, housing, and the provision of utilities (electricity, water, and sanitation).

People experiencing financial hardship

The survey captured citizen views on the degree of household financial hardship they experienced. It was found that 51% of surveyed citizens identified as experiencing moderate household financial hardship, while approximately one third (35%) identified as experiencing extreme household financial hardship and 14% identified as experiencing low household financial hardship. Respondents experiencing extreme financial hardship had a weaker sense of civic duty, were less engaged with politics, and had weaker perceptions of freedom of expression in PNG.

3. Background, research objectives, and methodology

3.1 Background

The 2019 PNG Citizen Perception of Governance and Media Engagement study was commissioned by ABC International Development as part of the Media Development Initiative (MDI). MDI managed two previous national media audience surveys in 2012 and 2014 to provide information and insights about citizen access to information (as well as insights on other topical issues).

3.2 Research objectives

The research was designed to understand and measure citizen attitudes and perceptions of PNG governance as well as media access and consumption patterns of PNG citizens. These findings informed key evaluation questions around citizens' media access and consumption habits, general access to information, information needs and interests, and perceptions of trust in media.

3.3 Research method

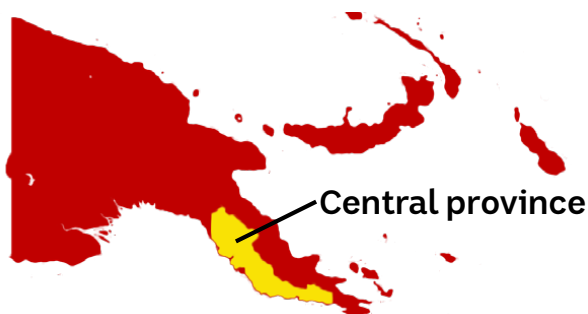
The two-part research study comprised of a large-scale quantitative survey and a small-scale qualitative focus group discussion, executed concurrently. A total of n=1,539 respondents aged 18 years and over completed the paper-based quantitative survey. Twelve single-gender FGDs were conducted in six urban locations across PNG. They comprised of citizens of PNG aged 18 – 55 years. A detailed method and sample configuration can be found in the methodology (Chapter 12) section of this report.

4. Citizen perceptions of governance in PNG

The qualitative findings determined that PNG citizens generally view PNG as a country undergoing transformation. Fundamental changes have been observed by citizens in the past five years. Specifically, the respondents reported decline in overall quality of life (including personal safety, access to services) and an increase in the cost of living. There was also a perceived decline in the economic management and performance of the country, often associated with a sense of pervasive corruption amongst those in power. Citizens expressed strong beliefs that there has been a lack of investment in the development of PNG, especially in rural areas and away from Port Moresby and Mount Hagen. This resulted in perceptions about a loss of opportunity, a lack of growth in the economy, and the absence of employment pathways (particularly for young people and women), contributing to dissatisfaction amongst citizens of PNG. The FGD findings identified ten (10) key themes.



80% of citizens surveyed said
PNG is heading in the **wrong** direction



28% of citizens surveyed in Central province
said PNG was headed in the **right** direction.

Each of these themes contribute to what is generally considered to be the 'direction' the country is moving in. These qualitatively derived perceptions are supported by 80% of citizens surveyed, who believe the country is going in the "wrong direction". Results on this metric were consistent across demographic groups and regions, with the exception of Central province, where significantly more people indicated the country is going in the right direction (28% vs 12% for national average). Nonetheless, on balance, many more people feel the country is going in the wrong, rather than the right direction.



4.1 The dominant patriarchal mindset / system

Except in the matrilineal areas of PNG, the dominant patriarchal mindset and systemic gender inequality was perceived as a key barrier to equal opportunity for women. This includes women's participation in local decision-making and representation in leadership positions at any level. Women are reportedly often marginalised. Men predominantly occupy leadership roles and make development decisions across all levels of government, including the community level. While some women and a few men believe women can be legitimate and representative leaders, the current dominant mindset and system remain barriers to women's participation. Physical and sexual abuse or violence against women emerged as a key barrier to women's participation in the community in all of the women's FGDs and a minority of men's group discussions.

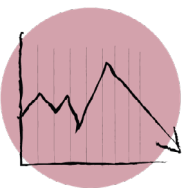
4.2 High perceived levels of corruption



The issue of corruption was a spontaneously raised and robust topic of discussion in the group discussions. Across the board, high levels of corruption were perceived to exist in PNG across all levels of decision-making and positions of power (except for some individuals and church leaders). Corruption was reported to lead to citizens' generalised distrust and frustration with leaders and the state of the country. Citizens also exhibited a feeling of powerlessness and resultant apathy towards engagement in decision making. There was a strong sense that these issues need to be addressed for the country to head in the 'right' direction.

The survey also confirmed the dominant view (and one of the key themes of this research) that corruption is pervasive in PNG. Eighty seven percent of citizens indicated that corruption is worse than a few years ago. Corruption is perceived to be increasing in Morobe particularly, where 92% of citizens believe it to be worsening. Interestingly, women were more likely to perceive corruption to be worsening than men (91% of women feel it's becoming worse, compared to 82% of men).

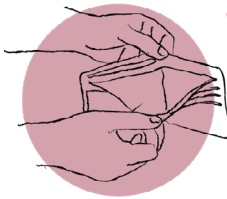
4.3 Poor economic management



Many in the FGDs demonstrated a good understanding of the economic position of PNG. It was expressed that this understanding had been largely acquired via media and personal experience. Unemployment and lack of funding for public services were viewed as indicators of how well the economy was performing. At the time of the study, most citizens considered the economy to be regressing. Citizens expressed the view that the declining economic performance of the country was negatively impacting the provision of essential government services, especially across education, health, and policing. It was believed that this was contributing to homelessness, youth unemployment, and a lack of investment in job creation. Several citizens expressed frustration about the lack of benefits that citizens receive in exchange for the sale of PNG's natural resources to foreign countries and held that it contributed to worsening economic conditions.

Amongst participants (largely those living in Port Moresby, Manus and Mt Hagen), there was concern about the perceived reduction in foreign aid to support valued and desirable programs and services. A few were concerned about an increased reliance on foreign government loans (particularly from China), perceived to be placing the country at risk of losing ownership of sovereign land and resources.

Results from the survey confirm that economic issues are a concern of citizens (mentioned by 43% as a top national concern), and economic growth is not perceived to be improving. Specifically, 69% feel that economic growth is currently worse than a few years ago. Poor economic growth perceptions are particularly strong among those in Morobe (81% feel it has worsened in recent years) and among women (80% feel it has worsened).



4.4 High cost of living and daily economic pain

The high cost of living was a major concern for all participants especially those who struggle to meet basic needs such as providing food for the family. High cost of living was considered to directly impact citizens' quality of life, access to services, and participation in decision making. Many in the FGDs discussed daily struggles that translated into compromising on everyday expenses such as the daily purchase of newspapers. The cost of technology such as mobile communications, internet, and Pay TV – now considered communications necessities – is also placing greater pressure on some household and personal budgets.



4.5 Lack of real listening

Several FGD participants expressed that leaders in PNG do not appear to have developed a "listening culture". This is largely attributable to the pervasive hierarchical norms of gender and age and status inequity. As mentioned earlier, women experience fewer opportunities to voice their opinions and more frequent opposition or dismissal of their views. Young people defer to their elders and consequently do not feel they are able to express their needs and opinions. As such, the leadership group, comprised of mature men, may be operating within an echo chamber.

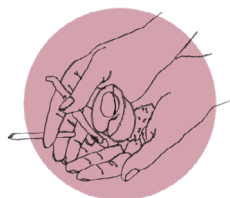
Citizens measure listening by visible and tangible outcomes of improvement. Participants perceived a decline in the "extent to which MPs listen to people" (60% believing listening has worsened) and weakened "access to help from the government to solve problems" (56% believing this). Access to help from the government was perceived to be poor across all regions and was seen to be decreasing, particularly among citizens in Morobe and Manus.



4.6 Decline in access to key services (education, health care, medicines, roads, policing, and basic services)

Across the board, participants in the FGDs complained about the decline in the funding, resources, and operations of public services. For instance, citizen access to education is impeded by cost-barriers, and access to health services is impeded by under-supply of pharmaceuticals. Lack of law and order enforcement also appears to be a major systemic issue in PNG. Citizens commonly expressed concern about the under-staffing and low pay of the police force, as well as widespread corruption. The general view was that police resources and standards have reportedly declined so drastically that many do not seek help from police primarily due to reservations about their professional conduct. Women commonly cited corruption as the key barrier to police engagement.

4.7 Personal safety (crime, violence, sexual assault) and co-morbidity with prevalence of drugs and alcohol



During the FGDs, citizens were asked to discuss what they consider to be major issues for people of PNG. Women demonstrated a high degree of awareness and/or personal experience of domestic violence, sexual assault, and street crime. The apparent easy access to drugs (marijuana) and alcohol appear to be of great concern to many. Parents and community elders expressed concerns about substance abuse amongst young people and women spoke of negative outcomes associated with adults using these substances.

The survey findings also reiterate that personal safety problems are not improving. Fifty two percent of those surveyed indicated that their personal safety from crime and violence has worsened over the last few years (compared to 22% saying that it has improved). Citizens in Western Highlands province particularly felt their personal safety had decreased (69%), as did those residing in Manus (59%). Women were also more likely to indicate that their personal safety had worsened (56% vs 49% for men). Those living in urban areas more commonly perceived increases in violence (60% vs 49% among those in rural/remote zones).

4.8 Rise of social media (and fake news)



Amongst some of the more financially secure sectors of PNG's society, social media is highly aspirational, readily accessed, and enjoyed by most. Social media has created an avenue for young people to access new viewpoints, become informed about global and local issues, and form their own beliefs. While a few users of social media said they could express their opinions and be heard at a community level, most do not have an avenue for expressing their opinions in the current analogue, 'non-listening', hierarchical context. This appears to be restricting their input into decision-making and problem solving in relation to youth, gender, and disability issues.

The personal choices presented by social media platforms provide youth who can afford and have access to data with the opportunity to access a range of content. This includes content that is incompatible with the expectations of the older generations e.g. pornography. This informational schism between the content accessed across different generations was found to exacerbate generational divisions.

Fake news is news that is predicated on dubious information/evidence. Most traditional news sources were considered to consistently report real news. However, citizens agreed that with the rise of social media and tabloid-style newspaper reporting, fake news is now a normal aspect of life. Some citizens felt that they could quickly recognise fake news, but others revealed that they had been fooled by fake news and only become aware of the real situation through family, friends, or traditional news media channels after the fact. Overall, most citizens felt they had strategies to detect and navigate this phenomenon.



4.9 Lack of opportunities for youth

Citizens commonly perceived a lack of opportunities for youth to influence social change and to pursue educational and employment opportunities. Younger people were most likely to express these views in FGDs while the older males were less likely to acknowledge the issue.

The FGDs identified perceptions amongst young adults that many older males enjoy their position of power and status within their community and resist change of the status quo.

Younger participants felt that many older men are not open to listening to the issues of young people, or willing to permit youth councils or representation from young people to have a seat at the table. Overall, young people expressed that they feel unheard outside of their immediate families and have little to no influence in meaningful community decision making.

Several young people also expressed the cost of education is a barrier to continuing secondary education. The lack of educational and youth employment opportunities, particularly for young women, are considered to contribute to a widening of the generational, economic, and opportunity gaps – especially in urban areas. Youth disengagement from education, employment and other activities was believed to contribute to loitering and, at times, anti-social behaviour. In addition, it appears that young adults, particularly those out of education or employment, have easy and affordable access to alcohol (particularly steamed beer) and drugs (particularly marijuana). Intoxication was perceived to result in young people becoming involved in crime (to gain funds to support their substance use) and violence (especially against women). This is a significant concern to many adults who feel powerless to influence positive change in these areas.

4.10 Past experience with government shapes perceptions of mistrust



As mentioned, the general consensus was that the country is moving in the wrong direction, and that the government has largely failed to deliver on promises to develop the country. Thus, a high degree of mistrust in government policies, programs, and reform systems exists.

It is important to acknowledge that the prevailing systemic lenses and past experiences shape satisfaction with the direction the country is going and leadership at all levels. Experience is a key driver of perceptions – particularly more negative experiences; outcomes or lack of outcomes, reports of corruption, misappropriation of funds, not delivering on promises and incompetent leaders- impact heavily on how government and leaders' performances are assessed and viewed. Keeping of promises (and delivering of essential services and opportunities) shapes public perception. Across this FGD sample, the general view was that promises are rarely kept and issues tend to 'disappear' due to inaction on behalf of leaders. This was expressed at a range of levels, from local to national.

As most participants measure the level of real listening of leaders by tangible outcomes, there was a hope that promises will be delivered via improvements in accountability, transparency, and active listening on the part of leaders. The evidence of these attributes is currently low. The apparent lack of government leadership appears to provide fertile ground for church groups to act in a de-facto leadership and public service roles, and to deliver some programs at the community level such as disability care homes. However, the key function of the church was perceived by FGD participants as Christian teaching and spiritual guidance, and while many respect church leaders, the participants considered service delivery a government responsibility.

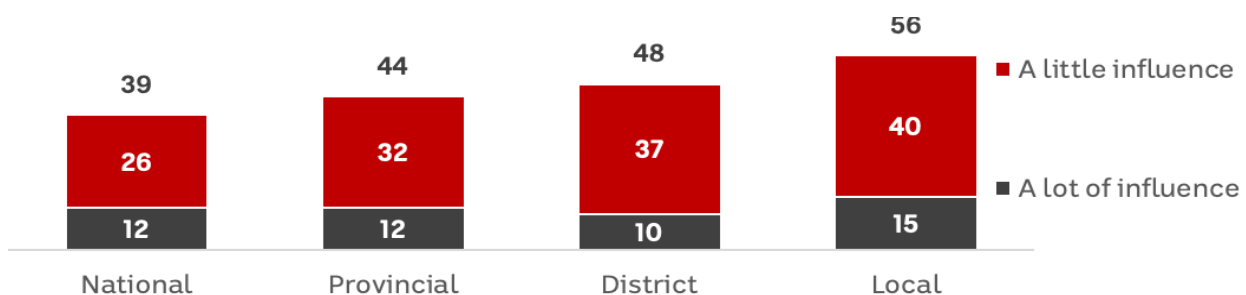
5. Citizens' voice and influence on decision making

This chapter provides an overview of the citizen voice and influence on decision making based on both the survey findings and FGDs. It also delves into the key social and political issues facing citizens and their level of knowledge on such issues.

5.1 Citizens' level of influence over government decisions

While perceived citizen influence correlates positively with the locality of government, very few citizens feel they have "a lot" of influence on government decision making at any level (see Figure 1). Nonetheless, some citizen groups felt they have greater ability to influence government decision making. This includes men, those with higher education levels (i.e. at least some secondary schooling), those who are more financially secure (i.e. can comfortably afford to buy food and/or clothes), and citizens in urban areas. Some provincial differences were also evident, with Morobe citizens indicating they had more influence across all levels of government than other citizens, and Western Highlands province residents indicating that they had more influence at national, provincial, and district levels.

Figure 1. Level of personal influence over government decision making



(%)Base: All respondents (n=1,539)

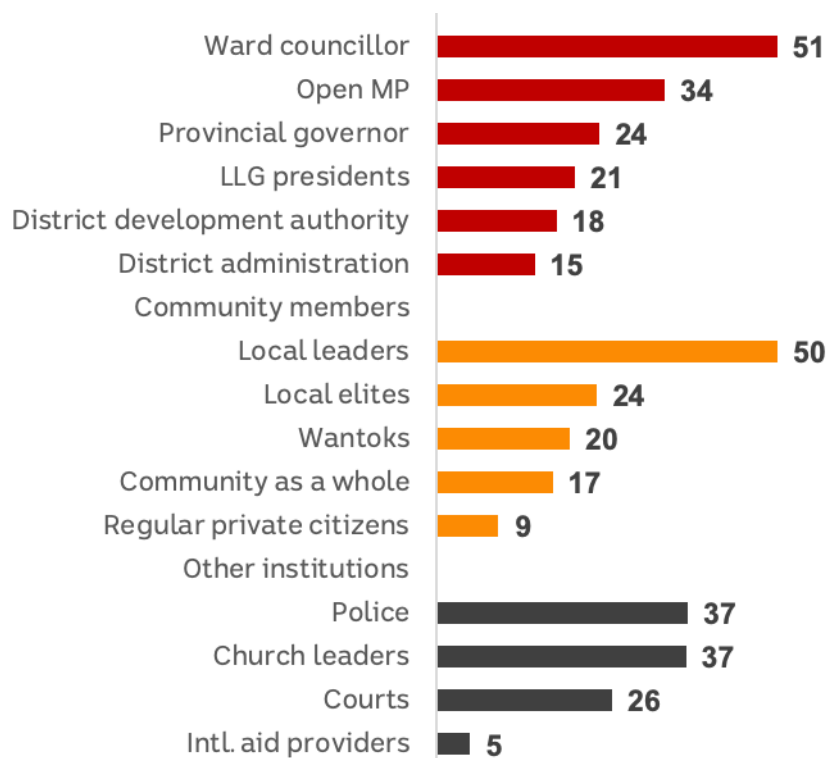
5.2 Where citizens go with problems

The key people and institutions on whom citizens rely to fix problems in their local districts are ward councillors, local leaders, police, church leaders, and their Open MPs (see Figure 2). The research indicated significant provincial differences in who citizens rely on, as follows:

- Central province citizens are relatively more likely to rely on government/administration and courts
- Western Highlands citizens are more likely to rely on church, police, courts, local elites/private citizens, and the community as a whole
- West New Britain citizens more likely to rely on provincial/district governments and administration and their community as a whole
- West Sepik citizens, on the other hand, are more likely to rely on their Open MP and (DDA)/administration
- Residents in Morobe and Manus rely on fewer groups and individuals than other provinces

Citizens in urban zones rely more on police, courts, their provincial governor, and the DDA, than to those in rural/remote zones. Women also nominated fewer groups and individuals that they rely on to fix problems, mentioning an average of three (3) individuals/institutions, compared to almost five (4.7) for men. This may reflect broader gender inequalities, with women feeling less able to influence decision making, thereby being less active in their local community when it comes to trying to address problems. Consistent with this, women reported taking fewer civic actions about important issues than men (as discussed in the next section).

Figure 2. Institutions, groups, and individuals relied on to fix local problems (% of responses)



Base: All respondents (n=1,539)

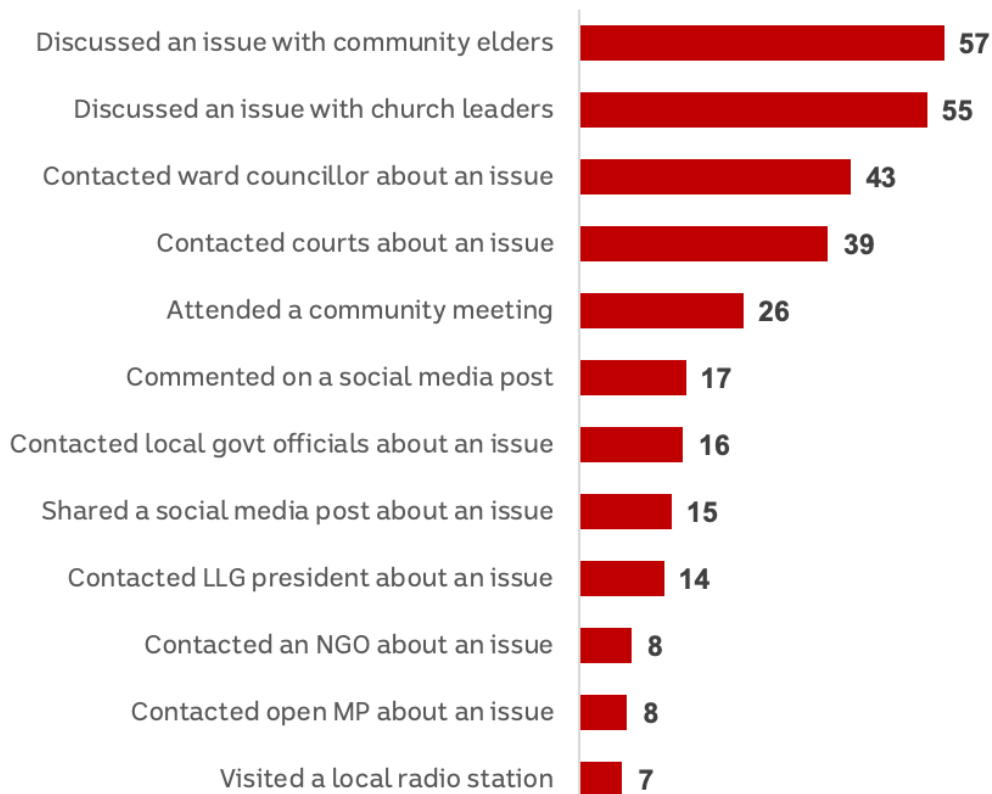
5.3 Civic engagement

Citizens reported using a wide range of methods to express their opinions and engage with important issues. Discussions with elders and church leaders topped the list of civic actions (see Figure 3). Different patterns of expressing opinions were evident across different citizen groups:

- Those living in Morobe and Western Highlands province were more active across a range of activities;
- Urban citizens were more likely to use social media and contact radio stations compared to their rural/remote counterparts;
- Men were more active across almost all means of expressing opinions than women;
- Younger people (under 25 years) were more likely to comment on social media, while older people were more likely to talk to community elders and use official channels (courts, local level government (LLG) President, Open MP);
- Tertiary educated citizens were more likely to use social media, write blogs and engage with radio stations and newspapers

Those under more financial hardship (i.e. who struggle to buy food and/or clothes) tended to engage with issues across fewer media and platforms.

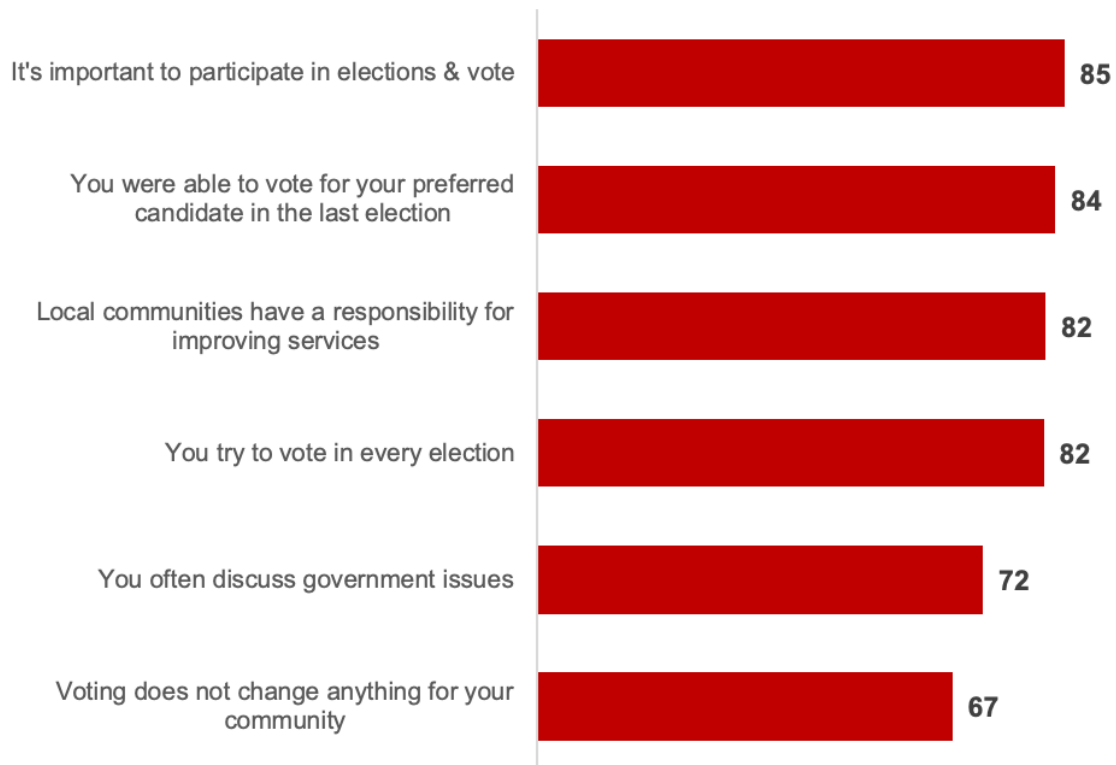
Figure 3. Top civic actions taken in last 12 months (%)



Base: All respondents (n=1,539)

The study also assessed civic engagement by asking citizens for their opinions about participating in elections. The results revealed strong civic engagement and high levels of recognition of the importance of participating in democracy (see Figure 4). When discussing participation in elections during the FGDs, citizens were quite passionate about the importance of democracy and the ability for citizens to exercise their democratic rights. However, there was some suggestions that the outcomes of elections are not having a positive impact on the community (around two thirds of survey participants agreed that voting does not change anything for them). This is consistent with results discussed earlier around poor satisfaction with government performance. A large proportion of respondents (four in five) also believed that the community itself has a responsibility for improving services.

Figure 4. Attitudes towards civic issues (% Strongly agree or agree)



Base: All respondents, excluding 'don't know' (n=1,532)

Attitudes towards participation in elections differed somewhat by province. Belief in the importance of elections was highest in West Sepik and Central province (92% and 90% agreement respectively), and lowest in Western Highlands (73% agreement). Citizens in West Sepik, Central province, and Manus were also more likely to discuss political issues than other residents.

5.4 Citizen voice-freedom of expression

Overall, while agreement with the idea that citizens "have the right to seek information with authorities" was high in the survey (84%), perceptions of freedom of expression were more modest (73% agreed they were "free to express opinions on any issue") (see Table 1). Notably, women in the survey were less likely than men to agree that they were free to express their opinions (68% agreement for women vs 76% for men). This is consistent with the FGD research, in which there was a general feeling among women that while views can be freely expressed among family, freedom of expression outside the family is impeded for most women.

Perceived media freedom in PNG is poor, with only 43% of survey respondents agreeing that "media in PNG are independent and free". Again, this finding is consistent with the qualitative research. Focus group discussions indicated that while print journalism remained highly regarded, some citizens perceived a decline in press freedoms in recent years due to external pressures on journalists. For example, some believed journalists are threatened by people in power and pressured to publish biased news. It is important to note that citizens generally held the sentiment that limited media freedom diminishes the ability of citizens to make informed decisions.

Table 1. Civic engagement and perceptions of freedom of expression in PNG (% of survey responses agree)

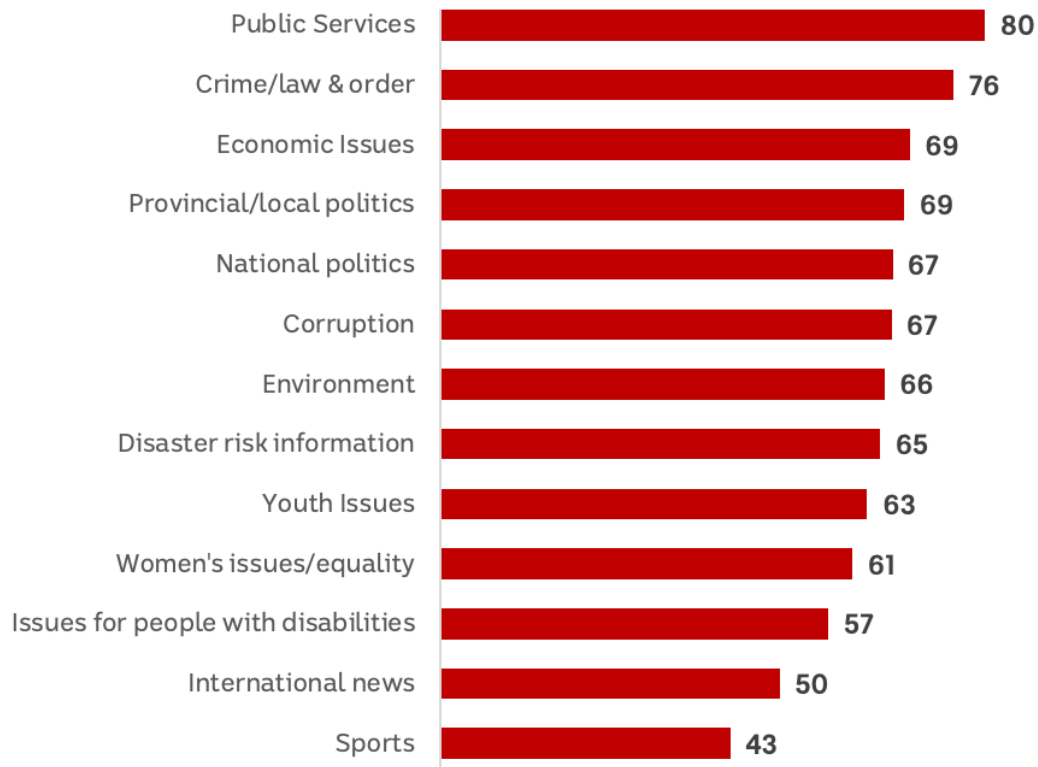
Civic engagement						
	Morobe	Central	WHP	WNB	West Sepik	Manus
It is important to participate in elections and vote	86	90▲	73▼	87	92▲	84
You were able to vote for your preferred candidate in the last election	84	87▲	65▼	86	95▲	85
Local communities in PNG have a responsibility for helping to improve services	91▲	88	76▼	66▼	89	83
You try to vote in every election	81	86	78	79	87	81
You often discuss government issues with other people	63▼	76▲	62▼	70	83▲	79▲
Voting does not change anything for you/your community	65	70	71	62	66	70
Freedom of expression						
	Morobe	Central	WHP	WNB	West Sepik	Manus
You have the right to seek information from local and national authorities	93▲	87	67▼	84	86	88
You are free to express your opinions on any issue	80▲	76	54▼	74	76	79
Media in PNG are independent and free	33▼	47▲	41	38▼	47	50▲

Base= All respondents, excluding 'don't know' (n=1,532)

5.5 Key social and political issues

The surveys identified that the most important issues for citizens were public services and crime/law and order (see Figure 5). Notably, while political and economic issues were also relatively important, issues facing vulnerable and marginalised groups (young people, women, and those with disabilities) were relatively less important.

Figure 5. Importance of social and political issues (% rating 'Very important')



Base: All respondents (n=1,539)

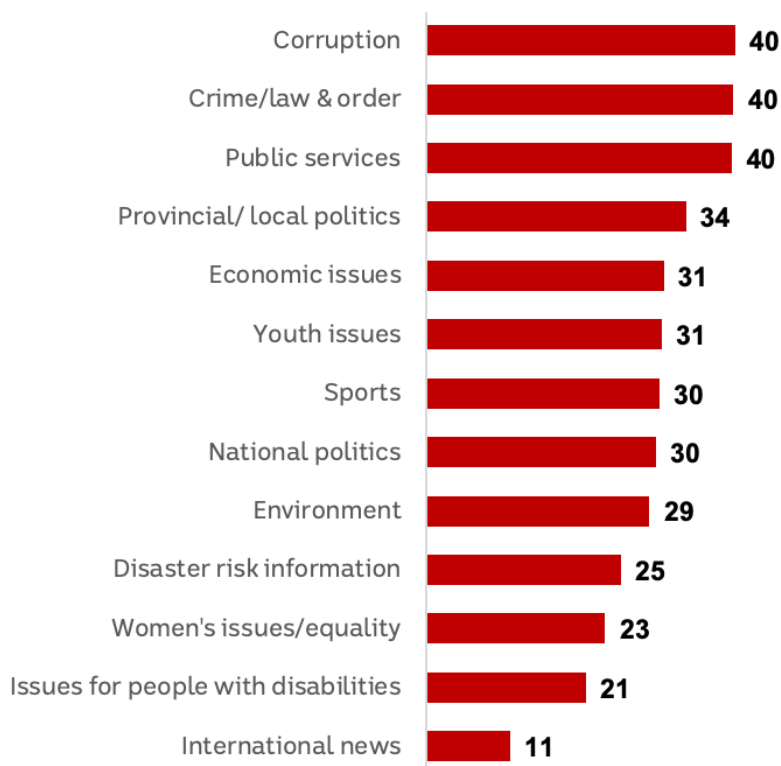
A very high degree of consistency was observed in issue importance across citizen groups, with a few exceptions:

- Environment and international news were perceived to be relatively more important in Morobe
- Crime/law and order was relatively more important in Western Highlands province
- Corruption was more important in West Sepik
- International news was more important in Manus
- Public services were relatively more important in rural/remote zones, whereas crime/law and order were more important in urban zones
- Women's issues were relatively more important to women, whereas sport was relatively more important to men

5.6 Knowledge of social and political issues

The survey measured self-reported knowledge of key social and political issues (see Figure 6). The results indicated moderate levels of knowledge overall, with stronger knowledge for high profile issues (corruption, crime/law and order and public services). There were knowledge gaps around women's issues/equality and issues for people with disabilities, as well as disaster risk information and international news. This is consistent with the lack of spontaneous mention of these issues within the FGDs.

Figure 6. Level of self-reported knowledge about social and political issues (%)



Base: All respondents (n=1,539) How to read this chart: A higher percentage indicates higher self-reported level of knowledge and vice-versa

A number of citizen groups have lower knowledge across the board: women, those living with high degree of financial hardship (i.e. cannot afford food and/or clothing), those living in rural/remote zones, and those living in West New Britain, West Sepik, and Manus provinces.

6. The changing media landscape – the past 5 years

The insights derived from the FGDs indicate that the media landscape is dynamic with many changes observed over the past five years. Specifically, four changes were raised, as discussed below.

6.1 Emerging media divide

The urban FGDs suggested that increasingly, two separate audience groups are emerging in PNG:

1. The traditionalist: The majority of these citizens are consumers of traditional media, tending to habitually read, listen, or watch media, and are less actively seeking content. As a consequence, traditionalists may be less actively engaged.
2. The digitally enabled: A growing minority are curators of their media and actively select, manage, and engage with media content, and favour new media channels over traditional media. For instance, digitally-enabled citizens may consume news online via computers or phones rather than via newspapers and television or radio.

The urban FGD participants, suggested that in many areas of PNG, the introduction of Digicel Play, the internet, and to a lesser extent smart phones has resulted in a segmenting of the audience. Those who can afford to pay for media and communication access (e.g. digital TV, internet data, phone handsets) have more and easier access to a range of media. This group tend to feel more engaged, informed, or entertained than others. Amongst some younger adults, phone handsets have replaced radios for portable and individualised radio listening, moving away from the home-based radio consumption behaviour of the past. Listeners also may access a phone-based playlist instead of listening to a radio station. “Second-hand information”, delivered via word of mouth, church services, or community meetings, fill any gaps caused by a lack of data credit for phones or computers, or if TV, radio and newspapers are not accessible.

6.2 Changing media platforms and access to media

The quality and accessibility of some media remains poor for many, resulting in unsatisfactory experiences and reduced access to some forms of media.

Radio transmission has been increasingly unreliable, impacting citizens' ability to access their usual programs.

Television viewing of EMTV has declined where the signal is poor. Share has also been taken by Digicel Playbox, EMTV online and Facebook feeds where transmission and internet connectivity are accessible.

FGD participants explained that DVDs are no longer used, having been replaced with phones, memory cards and flash drives as well as pay TV (Digicel Play) and movie programs.

"In the past when EMTV was introduced we've received all coverage and it's clear and very easy and we don't spend too much on that. But after the introduction of Digicel Play Box it cost more"

Kimbe, Male, 40+ years

"After 5 years I don't read newspapers that much or it's less because I don't like to go and buy newspaper. I used to get my news updates from radio or television, so now it's more of TV and radio and less of newspapers."

Mount Hagen, Female, 25-39

"A variety of age groups use social media, but in the past, it was just young people"

Port Moresby, Female, 18-24

"It's a big change because before that it was just newspaper and radio"

Port Moresby, Male, 40+ years

"Since Digicel Play Box introduction - radios, TV, CDs or cassettes aren't on sale"

Kimbe, Male, 40+ years

6.3 Cost of media and data is a barrier for some

The FGD participants revealed that newspaper sharing occurs but purchase of and access to printed newspapers appears to be diminishing due to the cost as well as a shift to consuming news via digital channels.



Pay to view TV, phone and internet data is expensive which limits engagement. Some citizens are priced-out of quality news access, further marginalising the financially vulnerable. Lack of data credit / money are barriers to the use of the internet, Facebook, or other digital platforms.

6.4 Benefits of digital and social media

Social media is aspirational and was specifically cited in the FGDs as the best way to operate in the contemporary context. Social media was praised for providing a group network experience, automatically linking citizens to a broader community and to collective feedback rather than one-way communication. The benefits of digital and social media included seeing what other people have said, verifying the authenticity of information, and watching or commenting as a dialogue unfolds. Applications such as ShareIt permit content sharing amongst families and peer groups.

Discussion about the pros and cons of digital media showed that for those with access, digital media is typically favoured as a medium of choice, and the associated benefits outweigh any concerns. Table 2 displays the attitudes of citizens from the FGDs towards various aspects of digital media.

Table 2. Attitudes towards digital media

Love 	Don't love 
<ul style="list-style-type: none">• Convenience (“Everything in the palm of your hand” (Port Moresby, female, 18-24)• Immediacy and instant gratification• Personal and private devices• Mobile (network permitting)• Newsfeeds from reputable news brands are current and informative• Improved access to information about issues around politics, governance, local community, and announcements• Aids to education• Access to movies and entertainment (outer provinces especially)• Social connection with friends and family• Ability to make new friends• Free downloads (music, videos) for young people	<p>For all:</p> <ul style="list-style-type: none">• The cost• Slow connection <p>To a lesser extent:</p> <ul style="list-style-type: none">• The “second-hand” news aspect of Facebook (several)• Fake News i.e. untrue stories• Family issues being publicly shared e.g. domestic violence (a few)• Personal criticism / bad comments on posts and low mention of cyber bullying by younger women• Lack of parental control over content (older people)• Access to pornography (mostly via the internet)• Distracts students from school / study (parental concern)• Demand for more data can result in family conflict, stretching of the family budget or loans from friends or family member to pay for data• The decline in personal contact “people are looking more at their phones and less at each other” (Port Moresby F 18-24) – Minor mention• Jealousy in a marriage (minor mention)

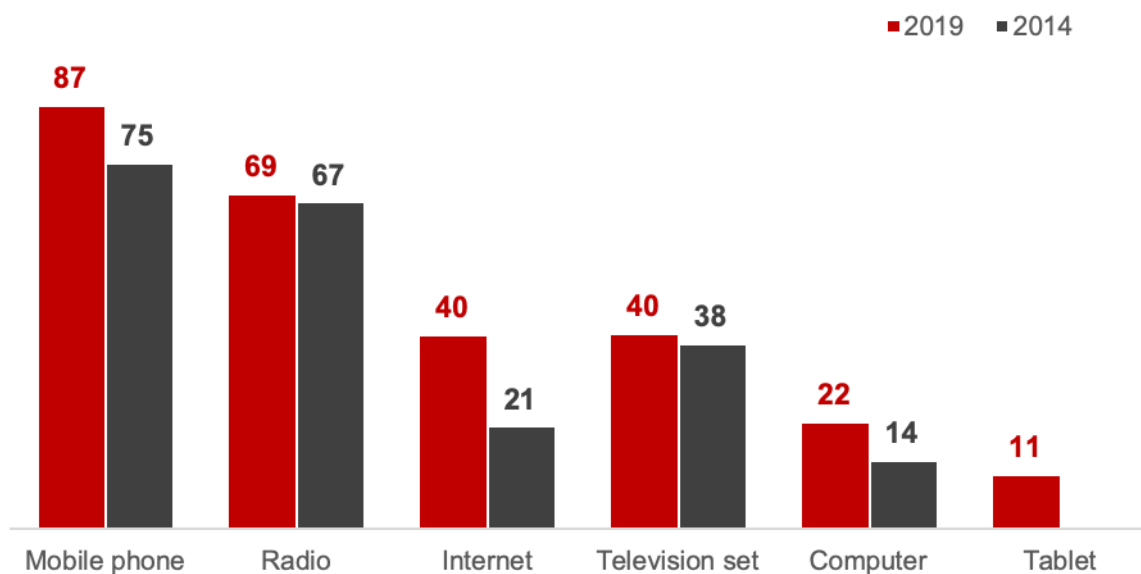
7. Overall media access, usage, and trust

This section of the report discusses survey and FGD findings in relation to household media and device access, the growth of mobile phone ownership, internet usage, and media consumption habits, as well as barriers to consumption of particular media channels.

7.1 Overall media access

Media access figures (see Figure 7) reveal that the majority of PNG citizens surveyed had access to a mobile phone in the household. Access to mobile phones has increased significantly in the last five years (up 13% since 2014¹). Access to the internet and a computer in the household also increased significantly since 2014 (up 19% and 8% respectively). Radio remains the second most common media device (steady at 69%) in the household. Access to television in the home remains steady at 40%. Around one in ten households have access to a tablet (tablet use was not measured in the 2014 study).

Figure 7. Household media and device access (%)



Base: All respondents (2019: n=1,539; 2014: n=1,303)

¹ Data from 2014 is taken from Debeljak, K (2014). Citizen Access to Information in Papua New Guinea, conducted by M&C Saatchi World Services Research & Insight. Retrieved from <https://www.abc.net.au/cm/lb/9080250/data/report-citizen-access-to-information-in-png-2014-data.pdf>. Note, while the methodology across studies was broadly the same, the 2014 study included somewhat different regional coverage and data should be interpreted with caution. Specifically, the 2014 study was conducted across the following provinces: Central Province, Milne Bay, Morobe, Madang, WHP, EHP, ENB and New Ireland.

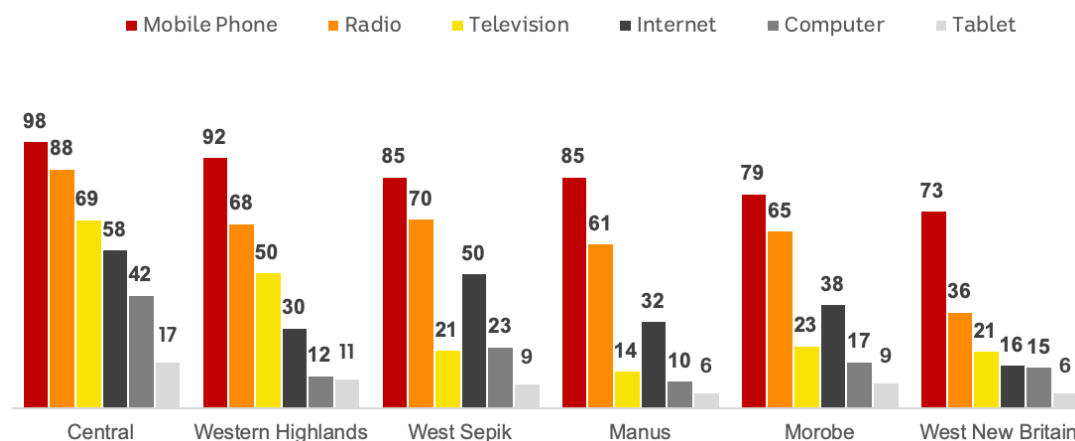
Further analysis revealed that the growth in internet and mobile phone access was driven largely by improved access among the least affluent households surveyed. Those who "don't have enough money even for food" (9% of the sample) showed an increase of 20% when it came to internet access and a 16% increase in access to mobile phones. Those who "have enough money for food, but buying clothes is difficult" (24% of the sample), showed increased access of 25% for the internet and 22% for mobile phones. In contrast, the most affluent households – households who "can afford to buy whatever they want" (9% of the sample) or "can afford certain expensive goods" (5% of the sample) – showed an increase of 10% for internet access and no increase for mobile phone access.

According to the Global System for Mobile Communications Association (GSMA), the growth in mobile access (and corresponding growth in internet access) in PNG can be explained by a number of factors: the emergence of new mobile providers and partnerships, recent deployment of new mobile infrastructure, improvements in network quality and the formation of a telecommunications regulatory body – National Information and Communications Technology Authority (NICTA). Based on international comparative data in GSMA reports, PNG has relatively low mobile penetration relative to other Pacific countries. Less than a third of residents were unique subscribers (i.e. not accounting for household subscriptions), meaning the nation has some way to go towards achieving digital inclusion for all². It is noted that despite low levels of individual ownership, household access was revealed to be at 90% in this survey.

Reported household media access differed substantially across provinces (see Figure 8). Notably, while household mobile penetration is relatively high across all provinces, there is wide variation in access to other media, with Central Province being the most media rich and West New Britain, the least media rich province. Of note, is the finding that internet access was higher than television access in three of the six provinces (West Sepik, Manus, and Morobe).

² Hight, C., Nique, M., Watson, A. H. A. & Wilson, A. (2019). Digital Transformation: The Role of Mobile Technology in Papua New Guinea. GSM Association. Retrieved from <https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2019/03/Digital-Transformation-The-Role-of-Mobile-Technology-in-Papua-New-Guinea.pdf>

Figure 8. Household media and device access by province (%)



Base: All respondents (n=1,539)

Unsurprisingly, households in more urban areas have better access to media than those in rural/remote areas (where rural areas include rural peri-urban, rural accessible, and rural remote zones). Table 3 shows that rural households are particularly disadvantaged when it comes to access to internet and television.

Table 3. Household media and device access by zone (%)

	Urban households	Rural households
Mobile phone	93	84
Radio	79	65
Internet	53	35
Television	65	31
Computer	40	16
Tablet	21	8

Base: All respondents (n=1,539)

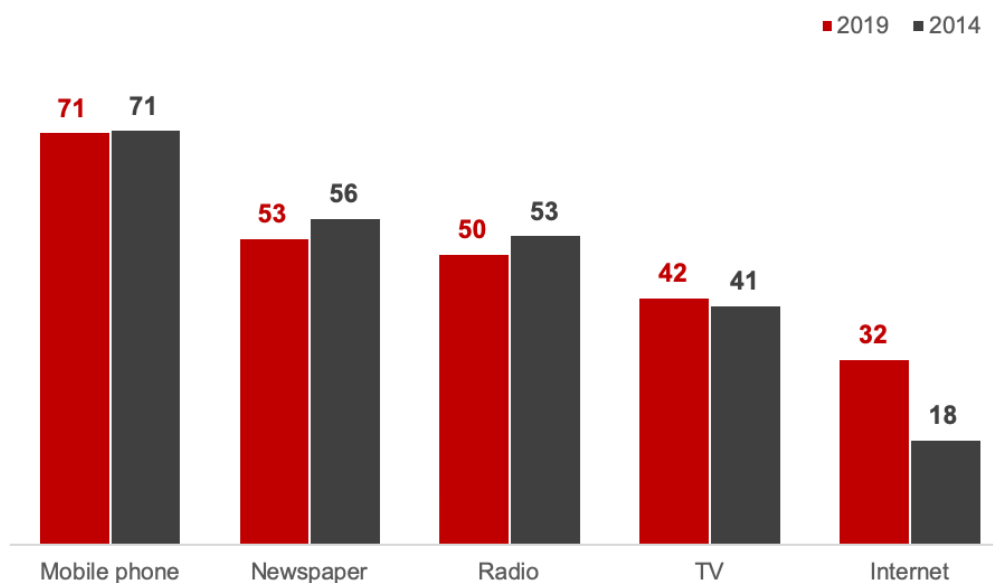
On average, PNG households have three screens available to them in the home (including any of the following: television, smart phone, tablet and computer). Nearly one in five (18%) have no screens at all, and nearly a quarter (23%) have five or more screens in their household (although not all of them may be operational). Central province households have the greatest number of screens (with a mean of 4.2), and over a third of households owning five or more screens. Similarly, urban households have more screens on average (4.6) than their rural/remote counterparts (2.5).

The survey also evaluated research participants' perceived level of control over different media devices within the household. This was assessed by asking citizens to indicate which of the household devices they could "personally use whenever they wanted to". Overall, perceived personal control was high, ranging from 91% among those with access to a mobile phone, to 70%, among those with access to a computer. While the differential is not large, women tended to report less autonomy over media device use in the household than men. Significant differences were observed between women and men in the following areas: 89% vs 94% respectively for mobile phones, 85% vs 90% respectively for radio, and 67% vs 79% respectively for the internet. Similarly, differences across age groups in media control were relatively modest, apart from the oldest household members, who tend to have least control over internet use (65% of those over 45 years reported having personal control vs 76% for younger householders). This can be largely attributed to the lack of computing skills and habituated use of non-digital processes and products.

7.2 Overall media usage

Media usage figures showed that regular internet consumption in PNG has increased significantly since 2014³ (see Figure 9). As supported by the FGDs, weekly newspaper and radio consumption have decreased slightly (but not significantly), while mobile phone and television use remain steady. The top stated sources of information and news were highly consistent with weekly consumption patterns: citizens nominated newspapers as the top source (mentioned by 69%), followed by radio (mentioned by 58%), and television (mentioned by 43%).

Figure 9. Weekly media use (%)



Base: All respondents (2019: n=1,539; 2014: n=1,303)

Some citizen groups consistently consumed more media across the board: men, urban residents, better educated citizens (i.e. those with at least some secondary education), people in white collar occupations, and students, those living in larger households (with more than seven members), and those under less financial strain (i.e. those who have at least enough money for food and clothes and can save a bit). This finding likely reflects a lack of access among vulnerable citizen groups. Availability (including infrastructure), affordability and limited literacy (including digital literacy) remain key barriers to access to media for women, those in rural/remote communities and other vulnerable groups.

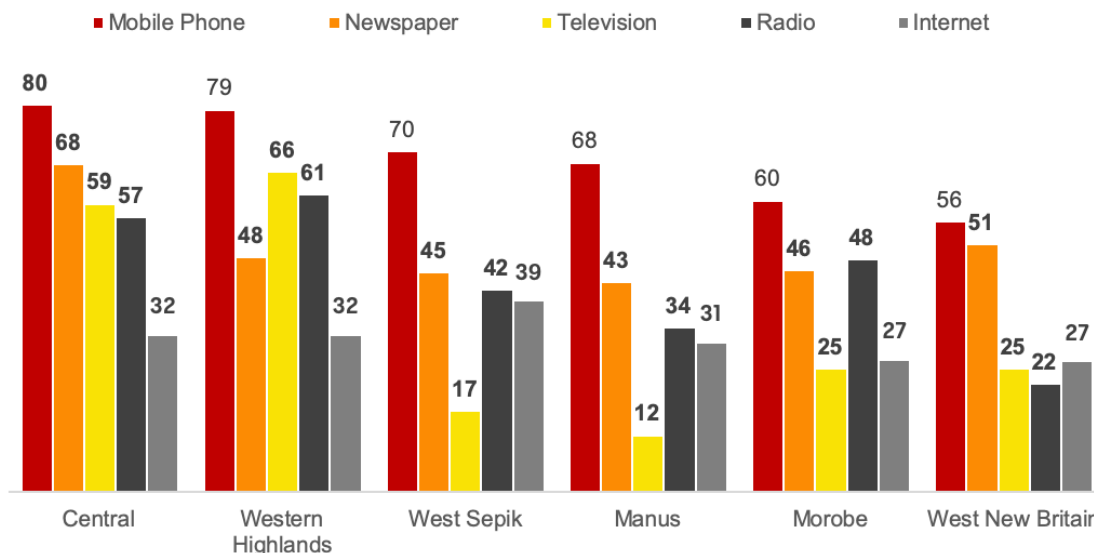
As a corollary to this, men, more educated/affluent citizens and those in urban areas tended to nominate newspapers, radio, television, and the internet/social media as their top sources of information and news. On the other hand, women, less educated/affluent citizens, and those in rural zones were relatively more likely to rely on word of mouth sources (church, family/friends, local leaders, and colleagues).

Other differences in weekly consumption patterns of note are that younger citizens (under 25 years) were more likely to watch television regularly (50% vs 39% for older people) and more likely to use the internet regularly (41% vs 28% for older people). Households with a male head were also more likely to be consuming radio and newspapers regularly compared to those with a female head.

3 Debeljak, K (2014). Citizen Access to Information in Papua New Guinea. Retrieved from <https://www.abc.net.au/cm/lb/9080250/data/report-citizen-access-to-information-in-png-2014-data.pdf>.

Media consumption patterns across provinces (see Figure 10) largely reflect access to media, with higher regular usage in more media rich provinces (Central and Western Highlands). As we saw with media access, internet usage has outstripped television usage substantially in West Sepik and Manus where reception is reportedly poor.

Figure 10. Weekly media use: By province (%)



Base: All respondents (n=1,539)

The FGD participants offered further details around media consumption. In terms of social media, a wide range of page types were "liked" including those of friends, defence force, sporting teams (especially rugby), PNG government and individual members of parliament (e.g. Kramer and Kramer Report, National newspapers, Aim Global, PNG anti-corruption organisations, PNG News, PNG Job seek, Crime Alert, NCD Alert, Disaster Alert, PNG Happenings, Celebrities).

Favourite radio programs varied across the sample, and, while people felt well-served by the range on offer, they requested more sport, humour, timely disaster alerts, and educational programs that support the school curriculum.

Key barriers to listening to the radio included: no transmission, poor reception, lack of transmission, unreliable power supply, lack of radio ownership and no time. Amongst digitally-enabled citizens, the switch to social media was the key barrier to time spent listening to the radio.

When asked about TV viewing behaviour in the community, FGD participant responses were consistent across the sample, although life stage appeared to impact behaviours and choices. Young females tend to mostly watch TV at home only when parents give permission. They were less interested in televised news broadcasts compared to older citizens and younger men. EMTV is largely watched by households and individuals because it is free to air. However, the general feeling was that TV Wan has better programming and content for entertainment and major sporting events, although is deficient in news reporting. Many lamented the lack of 6pm news bulletin on TV Wan.

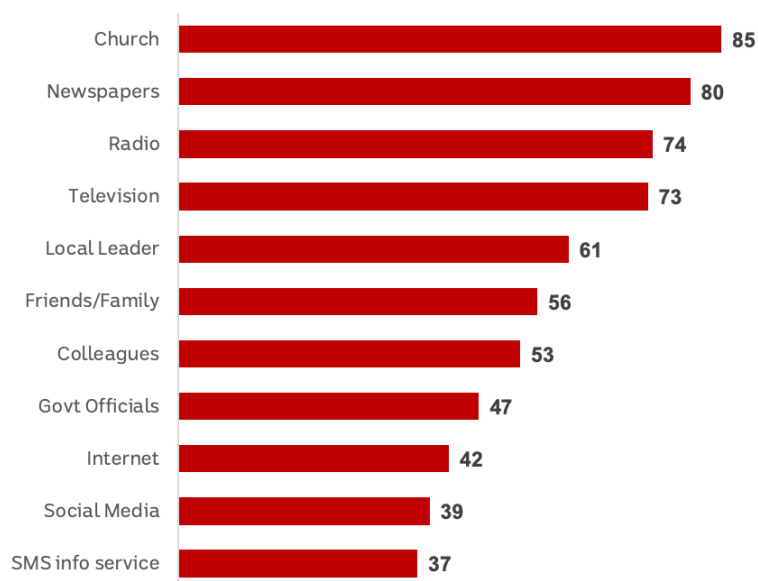
Participants without a TV at home often engage in communal viewing at a friend's house or a community centre. Communal viewing is often centred around movies (preferred by women), news (watched by men and women), and sport (mainly watched by men). The FGDs indicated that there is often a requirement for people to exchange goods or services to watch TV at a friend's house (especially TV Wan).

When asked to nominate barriers to consuming TV, participants offered the following explanations: no antenna, lack of TV ownership (too expensive), prohibitive cost of Digicel Play (K600 + data plans), poor reception, unreliable power supply, no time, and parental controls (young people). Social media was cited as a better alternative by those with access to this type of media as it is more reliable, immediate, interactive, on demand, and is driven by the individual.

7.3 Trust in information sources

The research survey results revealed that the most trusted sources of information for PNG citizens were the church, newspapers, radio, and television (see Figure 11). The church was universally the most trusted source in all provinces surveyed and among all citizen groups, and this is consistent with results from the FGD. While among the lowest trusted sources, newer digital sources of information (including social media) enjoy relatively higher trust among regular users (men, young people, those in urban areas, those with white collar occupations, and more affluent households). The FGDs found that social media platforms have a satisfactory trust premium among users as the views expressed can be challenged, commented upon, and quickly checked against other sources for authenticity and truth.

Figure 11. Trustworthiness of information sources (% very or quite trustworthy)



Base: All respondents (n=1,539)

The FGDs obtained a more nuanced response around trusted sources of information. It is important to note that citizens spoke about journalism as a trusted and respected profession in PNG. Journalists are considered the guardians of freedom of the press and truthful reporting. As identified earlier, the survey results indicated that belief in freedom of expression has diminished. This represents a challenge for the country, media stakeholders, and its citizens.

The most trusted sources and forms of media in PNG as mentioned by urban group discussion participants are as follows:

Newspaper

Print journalism is well-respected in PNG with *The National* considered the standard bearer. Newspapers were especially considered critical in rural areas where TV and radio access may be limited. However, this is also where they are most likely to be delivered late and be cost prohibitive. Those who are digitally enabled, reported trading off the price of newspapers for phone credit. While some read newspapers online (mostly older men), younger people tend to spend their data credit consuming entertainment and other non-news content. The areas for improvement cited for newspapers was to resist political pressure, report "both sides of the story objectively", reduce the price, and improve distribution so newspapers can remain current.

Radio

From the focus groups, it was clear that radio is fairly ubiquitous across PNG and is a valued source of information and entertainment. Of all radio brands, NBC had the highest trust premium. Interestingly, talkback radio appears to have positive trust credentials, as it operates as a truth barometer for some listeners to hear from other ordinary citizens.

Television

Television reporting also enjoyed a high degree of trust amongst participants. This is partly due to the use of live /audio-visual footage to substantiate reporting. Another success factor is the presence of local reporters who can draw on primary sources for information.

Family and friends

Word of mouth amongst one's network remained a key source of information for participants and this translates well to social media, although not all information on social media is deemed "factual".

Church

Churches emerged as the most trusted sources of information. However, this was largely limited to communication of important weekly news or events and guidance on how to view and act on the news through a Christian understanding. Generally, church leaders are a well-regarded source of information for citizens, particularly in areas where people do not have good access to information via media channels e.g. villages.

The high trust in church leaders as a source of information can be partially attributed to the strong religious faith that some hold. However, as noted from the FGDs, the commitment to delivering news and information appears to vary by church. The type of information provided by church leaders, usually via an announcement at the end of a sermon, is often secondary information sourced from news reports. It is also often concerned with programs and services provided by non-government organisations operating in the local community, rather than genuine community interest. The news is reportedly, delivered in a headline format and is often presented in the context of a bible teaching.

Finally, traditional media channels were reported as the key sources of information for disaster alerts (except in Kimbe, where radio is unreliable), and the following are listed as disaster alert sources in order of frequency of mention in the FGDs:

- Radio (FM stations and NBC) reports from the National Disaster Office
- Social media (disaster alert messages)
- Newspapers

8. Detailed findings on media consumption habits

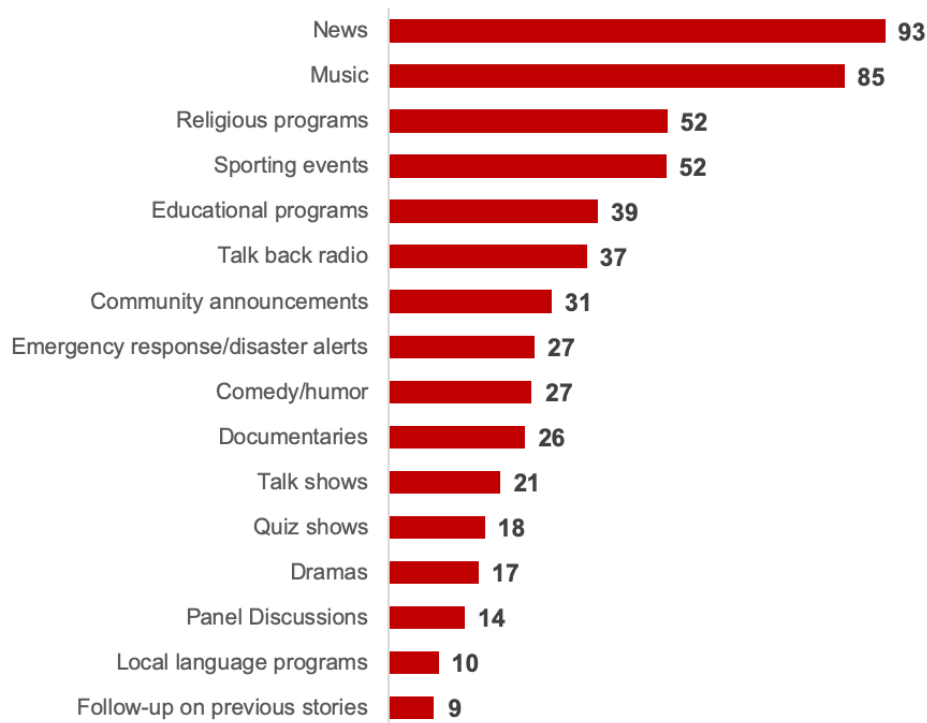
Media usage and preferences were explored in detail in both the survey and FGDs. This section of the report considers the reported consumption of radio, television (TV), haus piksas, newspaper, mobile phones and the internet. Each are discussed below.

8.1 Radio consumption

Three quarters of PNG adults reported listening to the radio from time to time, with 50% tuning in at least weekly. Mobile phones are the most popular device for listening to the radio (69%), followed by radio set/receiver (54%) and car radio (24%). The research showed that radio consumption is often a communal activity. Common communal listening areas (after the home) were public transport (61%), friend's or family's houses (41%), tradestores (30%) and community spaces (26%).

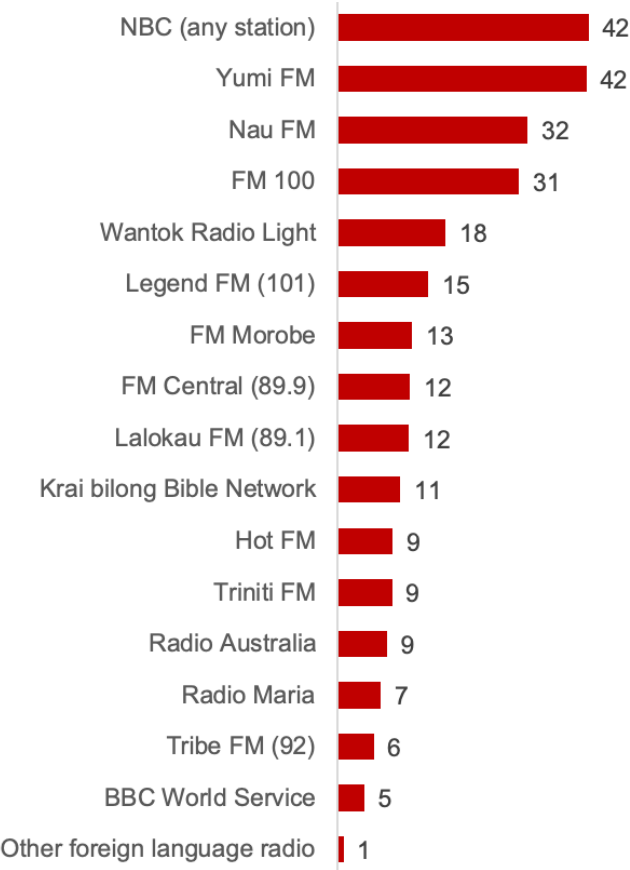
Radio listeners prefer a wide range of program types, with news the most popular, followed by music, religious programs and sports (see Figure 12). Preferences reflect overall radio consumption patterns, with groups who are heavy radio listeners preferring a wider range of programs. This includes men, better educated citizens (those with at least some secondary education), people in white collar occupations, students, and households under less financial strain (i.e. those who can afford buy expensive items/whatever they want).

Figure 12. Preferred styles of radio programming (%) Base: Radio listeners (n=1,058)



NBC and Yumi FM are tied as the leading radio stations nationally, followed by Nau FM and FM 100 (see Figure 13). Of the radio programs evaluated, the most popular were NBC National news (36% weekly reach), NBC Government Talkback (22% weekly reach), FM 100 Talkback (21% weekly reach) and NBC Current Affairs (20% weekly reach). FM 100 Komuniti Kona has a weekly reach of 12% and Stori Bilong Yumi (an NBC program that focusses on issues affecting people living in rural areas) has a weekly reach of 6%.

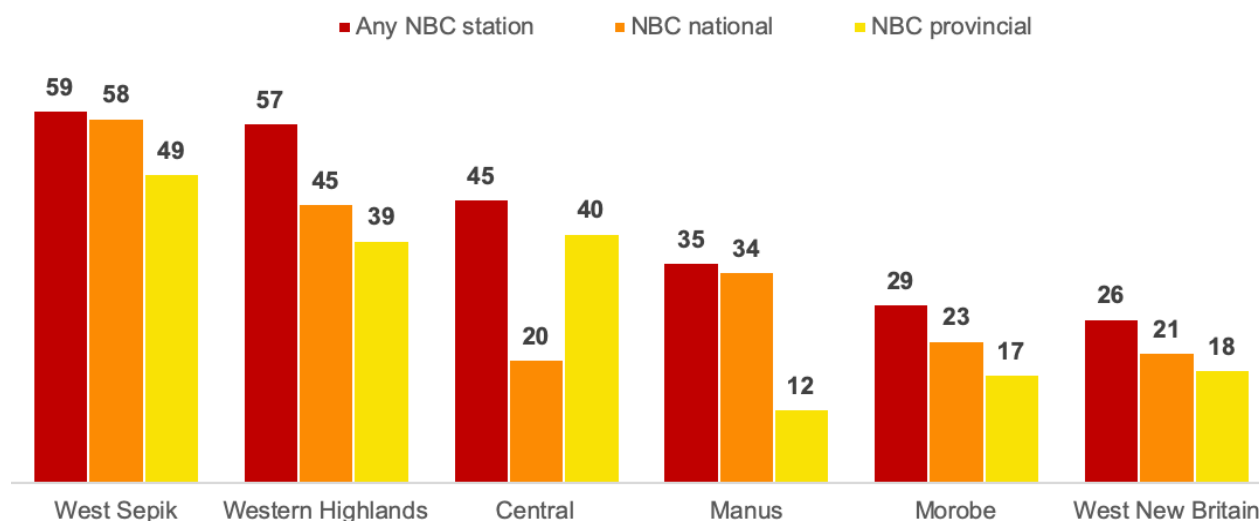
Figure 13. Weekly reach of radio stations (%)



Base: All respondents (n=1,539)

NBC's reach varies substantially by province (see Figure 14), with highest reach in West Sepik (where there are very few other options) and Western Highlands. In Western Highlands, Central province and Morobe, Yumi FM has higher reach than NBC (see Table 4).

Figure 14. NBC weekly reach, province



Base: All respondents (n=1,539)

The relatively low reach of NBC in Central province indicates that when listeners' media consumption is not limited by access issues, NBC becomes less appealing than some of its competitors. In Central province, NBC National lags behind not only Yumi FM, but also Nau FM, Lalokau FM and FM 100.

Table 4. Weekly reach of radio stations (other than NBC): By province

WHP	Central	Morobe	Manus	WNB
Yumi FM – 54%	Yumi FM – 58%	Yumi FM – 44%	Yumi FM – 28%	FM 100 – 17%
Nau FM – 45%	FM Central – 48%	FM Morobe – 41%	Nau FM – 24%	Yumi FM – 15%
FM 100 – 38%	Nau FM – 46%	FM 100 – 31%	FM 100 – 14%	
Triniti FM – 33%	Lalokau FM – 45%	Nau FM – 30%		
Krai Bilong Bible Network – 32%	FM 100 – 43%	Wantok Radio Light – 11%		
Wantok Radio Light – 29%	Wantok Radio Light – 31%	Legend FM – 10%		
Legend FM – 27%	Hot FM – 21%			
Radio Maria – 14%	Radio Aus – 17%			

Base: All respondents (n=1,539)

8.2 Television consumption

The majority of those who watch TV do so in their own home (68%), and around half (49%) watch in friend's and/or family's houses. Women were more likely to report watching at friend's/family's houses than men (56% vs 43%), citing enjoyment of the company of other women while watching their favourite programs (e.g. soap opera dramas or movies in particular).

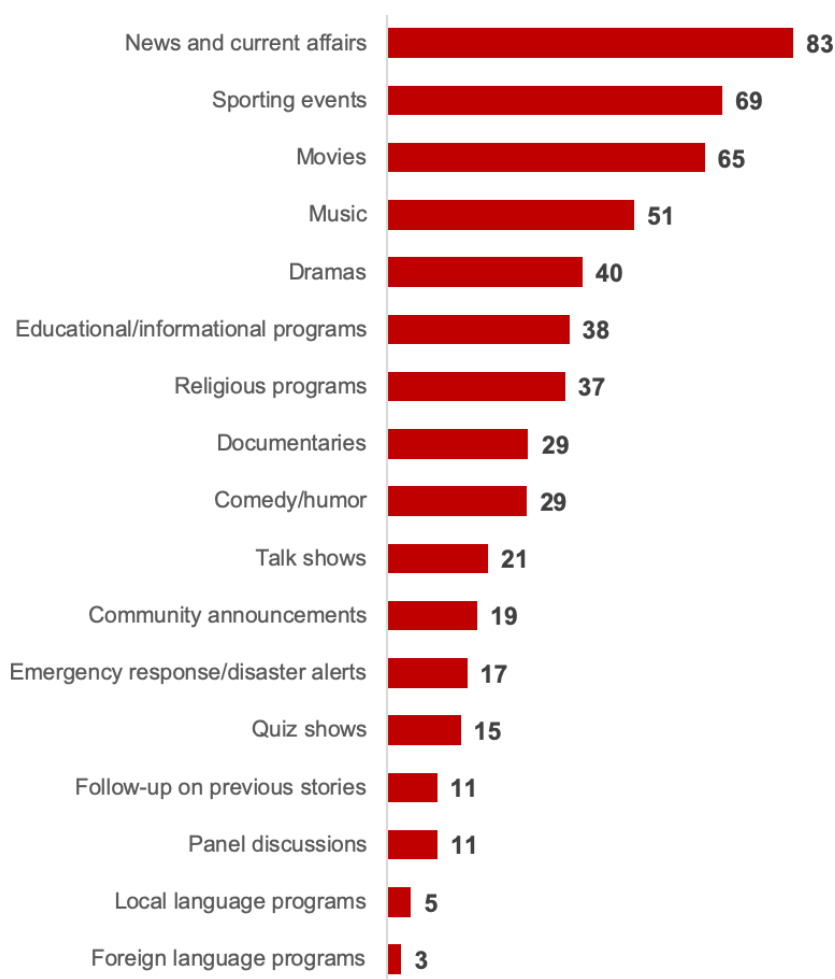
News and current affairs were by far the preferred programming participants reported consuming, followed by sports and movies (see Figure 15). Distinct preferences across demographic segments were also observed. Specifically, men reported relatively stronger preference for news, sports, documentaries, and community announcements, whereas women reported stronger preference for drama. Urban citizens reported a relatively strong preference for news, educational programs, and documentaries compared to rural/remote residents. Younger citizens (under 25 years) reported a stronger preference for sport than those over 25 years.

The insights obtained in the FGDs support the program genre preferences captured in the survey. However, some nuanced insights, did emerge in the groups around TV viewing behaviour and choice. Filipino movies and soap operas /dramas (both dubbed and sub-titled) appear to be very popular amongst women. News and sport appear to perform this function for men. There was a single mention of watching Bollywood and Chinese movies (Vanimo, female, 26-39 years) while the consensus amongst the urban sample was that Chinese TV is not viewed, as "they talk in their language, so we wouldn't understand" (Morobe, female 18-24 years).

EMTV is largely watched by households and individuals because it is free to air. However, TV Wan is considered to have better programming and content for entertainment and offers coverage for major sporting events, although as mentioned earlier, it's reportedly deficient in news reporting.

While TV enjoys around 60% of reach in PNG, those with access to digital media may have reduced the frequency of their TV viewing because their needs are met through new media: "For me TV is a thing of the past and I'm so hooked up to gadgets" (Port Moresby, male, 40-58 years).

Figure 15. Preferred styles of TV programming (% of respondents)

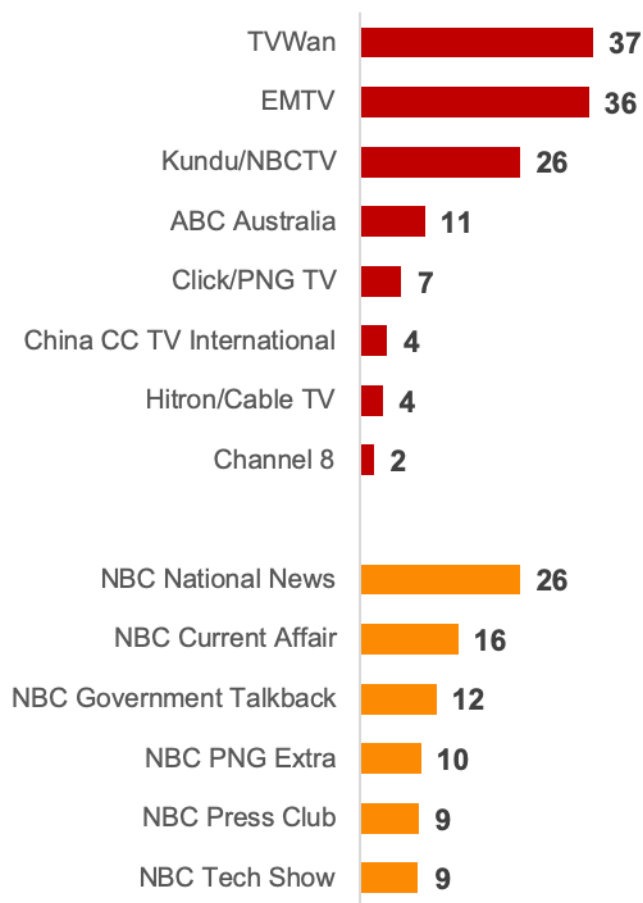


Base: TV watchers (n=773)

The most popular TV channels amongst participants were TVWan, EMTV, and Kundu/NBCTV (see Figure 16). As expected, all stations performed much better in urban centres where TV infrastructure is better developed and more reliable than in rural areas. Overall, the incidence of TV viewing was low outside of Central provinces and Western Highlands province. The top channels tuned into in Western Highlands province were TVWan (63%), EMTV (63%), and Kundu TV (26%). In Central province, the top channels tuned into were similar, with slightly lower penetration overall: TVWan (50%), EMTV (51%), Kundu TV (36%), and Click/PNG TV (14%). ABC Australia's reach across province is as follows: 13% for Central, 11% for Western Highlands, 8% for West New Britain, 3% for Morobe and West Sepik, and 2% for Manus.

Across the NBC programs evaluated, National News had the highest reach (viewed weekly by 44% of Western Highlands respondents and 41% of Central province respondents). Outside of Western Highlands province, there was very low viewership across the remaining NBC programs included in the research.

Figure 16. Weekly reach of TV channels and programs



Base: All respondents (n=1,539)

8.3 Haus piksa

The survey measured the incidence of attending a haus piksa or village cinema (an informal system of media distribution and screening established in the Highlands). Results indicate national attendance is low at 16%, but this peaks in the Western Highlands province (36%) and Manus (29%). Haus piksa attendance was also more common in rural/remote areas, than in urban areas (20% vs 9% respectively), and are not attended by any of the FGD participants based in urban who had low awareness of this form of entertainment.

8.4 Newspaper consumption

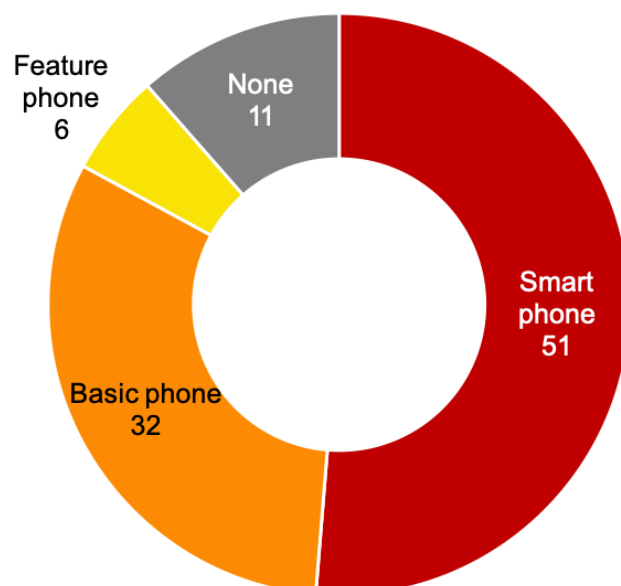
The survey indicated that a little over half of PNG adults (53%) read the newspaper weekly, and a further 29% read at least occasionally. Overall, the most popular newspaper is *The National* (with 56% weekly reach), followed by *Post Courier* (41% weekly reach). Thirty seven percent of those surveyed read both titles weekly. Wantok Niuspepa has a weekly reach of 2% and *Sunday Chronicle* has 1% reach. Regular newspaper readership is higher among men (67% vs 38% of women), urban residents (71% vs 46% for rural/remote residents), better educated residents (72% among tertiary-educated people), and households under less financial strain (73% among those can buy expensive items/whatever they want).

Findings from the FGDs indicated that increasing prices for newspapers in recent years has been a barrier to purchase for some. Low levels of literacy are also a continuing challenge to greater newspaper consumption, with more than a third (37%) of the population illiterate and the majority of these people living in rural/remote areas⁴.

8.5 Mobile phone usage

Four in five respondents (80%) reported using a mobile phone at least occasionally, with 56% using them daily. About half of mobile phone users amongst sampled participants have a smart phone (see Figure 17), with a basic phone the next most common phone type owned by participants. Smart phone ownership has increased substantially since 2014. The equivalent of 58% of phone owners now have a smart phone, compared to 29% in 2014⁵. Of those who do not have own their own mobile phone, the majority borrow one from both friends and family (89%) or from friends only (26%).

Figure 17. Mobile phone ownership (% of respondents)



Base: Mobile phone users (n=1,206)

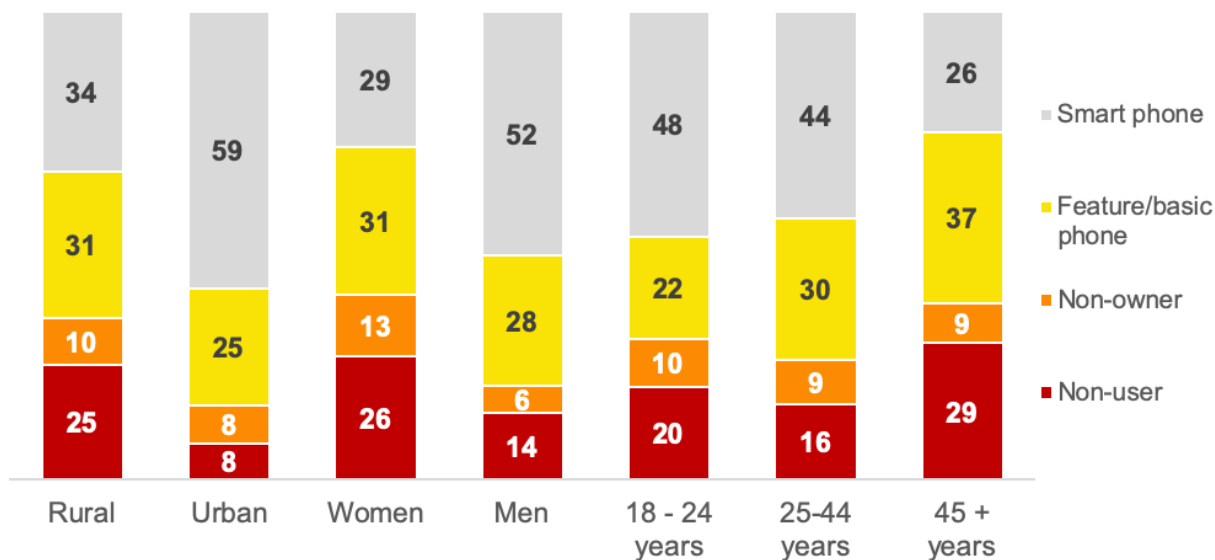
Mobile phone usage differs substantially across provinces, with West New Britain and Morobe reporting the highest proportion of non-mobile users (32% and 30% respectively). Usage of mobile phones (particularly smart phones) is also more limited among rural residents (i.e. those in rural peri-urban, rural accessible, and rural remote zones), women, and older citizens (see Figure 18).

⁴ World Bank (2016). Papua New Guinea: Reading for a Better Future. Retrieved from [//www.worldbank.org/en/results/2016/05/12/papua-new-guinea-reading-for-a-better-future](http://www.worldbank.org/en/results/2016/05/12/papua-new-guinea-reading-for-a-better-future)

⁵ Debeljak, K (2014). Citizen Access to Information in Papua New Guinea. Retrieved from <https://www.abc.net.au/cm/lb/9080250/data/report-citizen-access-to-information-in-png-2014-data.pdf>.

GSMA notes that while two thirds of the PNG population now have access to mobile phone coverage, a large number of citizens in rural remote areas remain unconnected because of the difficulty involved in extending mobile networks to remote mountainous areas. Furthermore, the gender gap in mobile phone ownership and usage is typical of many developing countries and is attributable to poor affordability and accessibility (including limited access to identity documents, electricity, and network coverage), safety concerns, usability issues, and a lack of skills⁶. Lack of digital literacy is also likely to be a major barrier to use among older citizens.

Figure 18. Mobile phone usage and ownership in survey respondents



Base: All respondents (n=1,539)

The division in access to mobile phones among rural/remote vs urban population and women vs men means that these already disadvantaged groups are less able to benefit from the economic and social change that these devices bring. This includes everything from the benefits of having a digital identity, to better access to health information, banking (which many appear to conduct on their phones), education, employment opportunities and agricultural information to benefit farmers (e.g. real-time weather data and crop prices)⁷. There is talk of an app being developed to report crimes electronically⁸. Women are disadvantaged when it comes to access to these emerging systems.

6 Highet, C., Nique, M., Watson, A. H. A. & Wilson, A. (2019). Digital Transformation: The Role of Mobile Technology in Papua New Guinea. GSM Association. Retrieved from <https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2019/03/Digital-Transformation-The-Role-of-Mobile-Technology-in-Papua-New-Guinea.pdf>

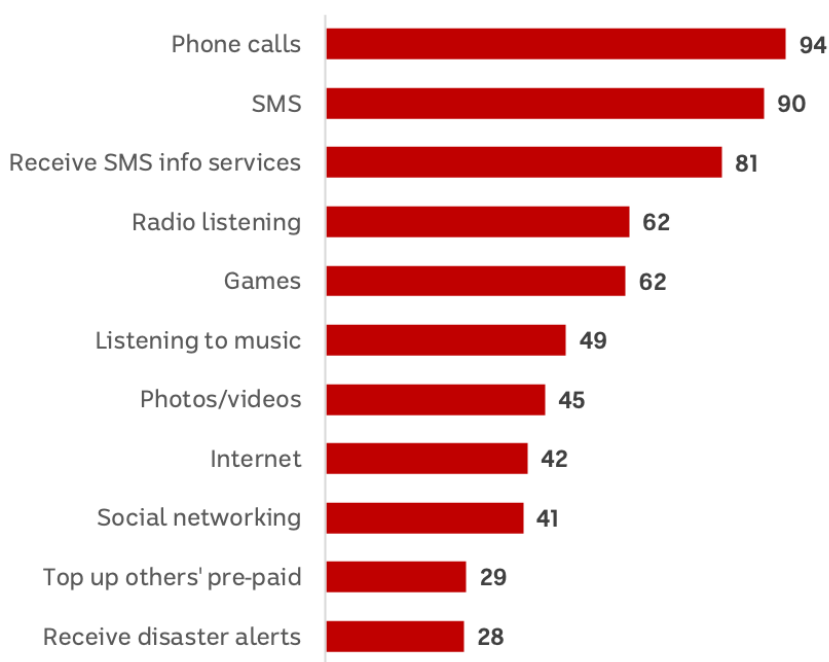
7 Curry G.N., Dumu E., Koczberski G. (2016). Bridging the Digital Divide: Everyday Use of Mobile Phones Among Market Sellers in Papua New Guinea. In: Robertson M. (eds) Communicating, Networking: Interacting. Springer Briefs in Global Understanding. Springer, Cham

8 Lyons, K. (2019). I will eventually be killed: Meet Bryan Kramer, Papua New Guinea's anti-corruption tsar. Retrieved from <https://www.theguardian.com/world/2019/aug/11/i-will-eventually-get-killed-meet-bryan-kramer-papua-new-guineas-anti-corruption-tsar>

Figure 19 shows the activities of weekly mobile phone users. While making and receiving phone calls and texts tops the list, around four in ten are using their phone to access the internet regularly (and the vast majority of these internet users are accessing social media). Around three in ten are topping up pre-paid credit for a friend and/or family-member. Those topping up for others tend to be male and under less financial hardship (i.e. are able to buy expensive things or whatever they want).

FGD participants reported that they mostly use their phones to make and receive calls, send texts, play games, watch movies, listen to music and the radio, engage with social media, read newspapers, news feeds and other feeds on Facebook, and Instagram, post to friends, and take photos and short videos. Most use free applications and those pre-installed on their phones. Payment for applications is offered as the key barrier to uptake of other applications.

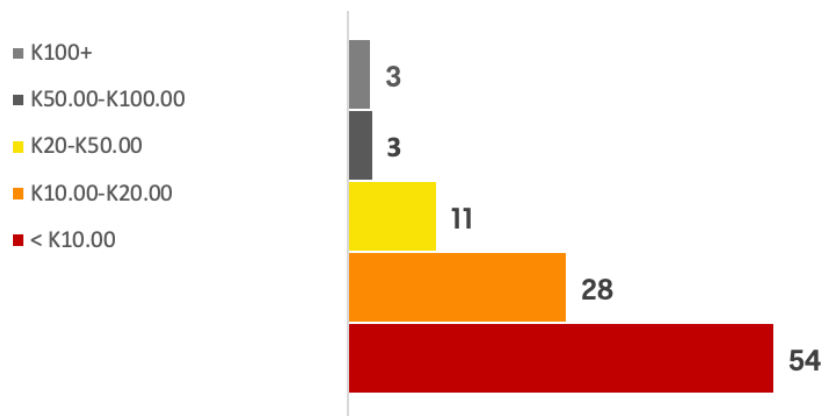
Figure 19. Weekly use of mobile phone for different activities (% of respondents)



Base: Weekly mobile phone users (n=1,060)

Figure 20 shows most internet users (54%) spend less than K10.00 per week on data for their mobiles, while 28% spend between K10.00 to K.20.00. Only 16% spend more than K20.00 per week on data.

Figure 20. Weekly data spend (%)



Base: Internet users (n=638).

8.6 Internet usage

Around four in ten (43%) participants reported using the internet at least occasionally. The proportion using the internet daily was small (10%), and about one third use the internet at least a few times a week. The vast majority (99%) of those using the internet access it via a mobile phone. Use of computers and tablets for accessing the internet is much lower (13% and 11% respectively).

Consistent with findings around access to mobile phones, the survey showed that rural/remote residents, women and older citizens are less likely to be regular (weekly) internet users. Specifically:

Fifty per cent of urban residents reported using the internet weekly, compared to 25% for rural/remote residents;

Forty one percent of male respondents report using the internet weekly, compared to 22% of female respondents;

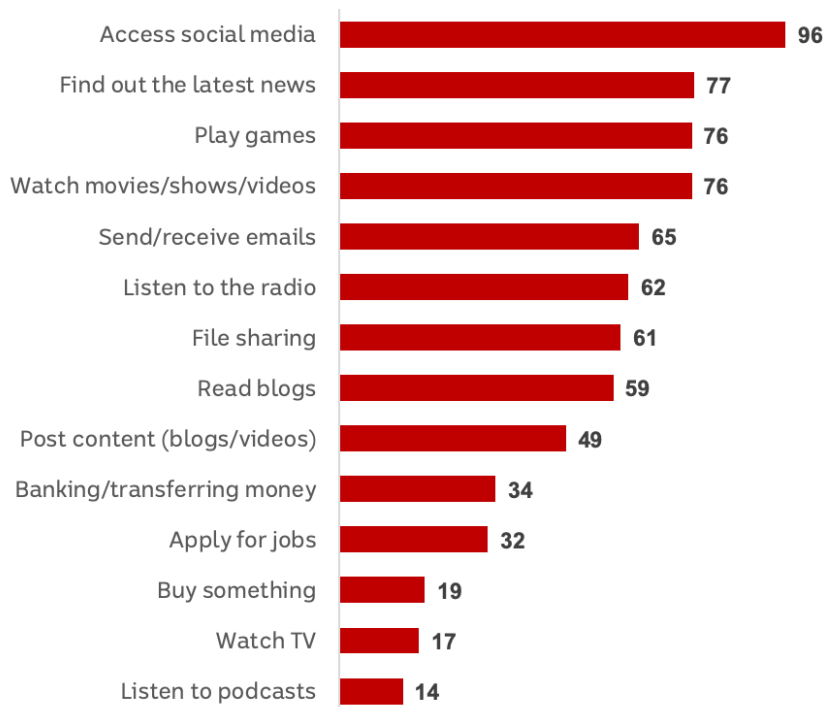
Thirty seven percent of respondents under 45 years reported using the internet weekly, compared to just 17% of those 45 years and over.

Most internet users (see Figure 21) are social media users, with Facebook being the most popular platform (93% use Facebook weekly, compared to 65% for WhatsApp, 29% for Instagram and 13% for Twitter).

A large proportion of respondents also use the internet as a means of accessing the latest news. *Loop PNG* is the most popular source of news, with a weekly reach of 29% among regular internet users, followed by *The National* website (17%), TVWan (14%), EMTV Online (14%), *Post Courier* (13%) and the NBC News Facebook page (13%).

File sharing is also very popular, with six in ten respondents doing this weekly. The top platforms and methods for file sharing were: Shareit (with 90% using weekly), Bluetooth (81% using weekly), and CShare (57% using weekly).

Figure 21. Weekly internet activities (%)



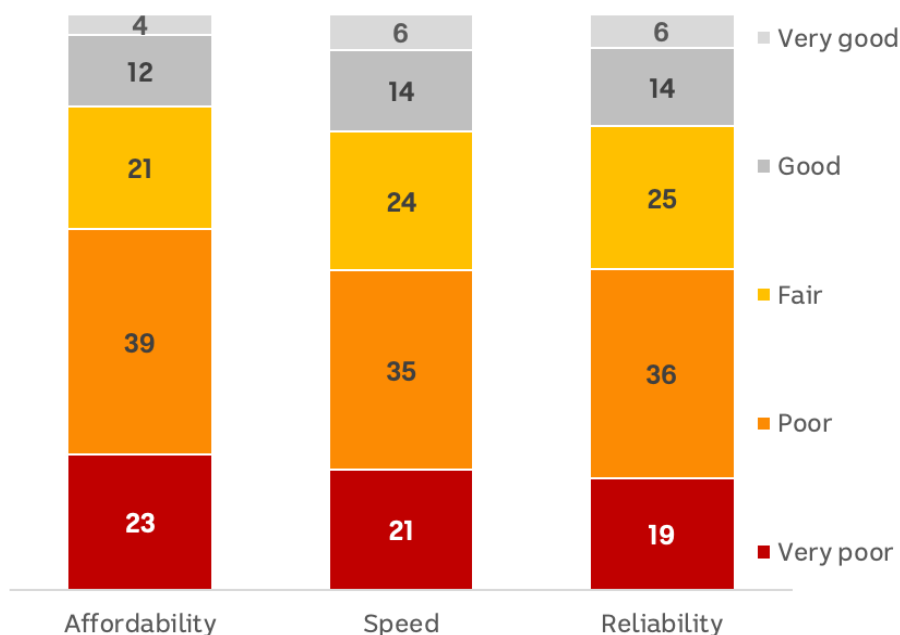
Base: Weekly internet users (n=486)

The results also show that a substantial number of internet users are banking/transferring money (34%) and applying for jobs (32%) online, confirming that internet access is assisting with opening up economic opportunities for at least a segment of the population.

Interestingly, while female participants were only half as likely to access the internet as men, they were more likely to report using the internet across a wider range of activities, including file sharing (70% vs 56% for men), posting content (55% vs 45% for men), applying for jobs (40% vs 28% for men), and shopping online (25% vs 15% for men).

PNG citizens have negative perceptions about their internet service performance. Figure 22 shows that only 16% believe affordability is very good or good, while 20% feel speed and reliability is very good or good.

Figure 22. Evaluation of internet performance (%)



Base: Internet users (n=638)

PNG currently ranks 150th out of 200 countries in the Global Broadband Speed Survey⁹. However, the Coral Sea Cable System project, a submarine fibre optic cable linking Sydney (Australia) to Port Moresby and Honiara (Solomon Islands), is expected to dramatically improve internet access, speed and reliability upon completion in 2019.¹⁰ Additionally, the Kumul Domestic Submarine cable (also due for completion at the end of 2019) will provide high speed internet capacity to more remote coastal centres in PNG.¹¹

While not mentioned by any FGD participants, these improvements are expected to have a number of follow-on effects including increased economic growth and innovation, as well as improved education and health outcomes. World Bank research estimates that improvements to internet access and reliability will create GDP growth in excess of US\$5 billion and around 300,000 new jobs in the Pacific by 2040. Most of these gains will accrue to PNG, due to the combination of large gaps in mobile usage, and the relatively large size of the economy.¹² GSMA notes that questions remain around the probable impact on internet affordability for PNG end-consumers, to recover the cost of this substantial infrastructure investment.¹³

9 Cable (2018). World Broadband Speed League. Retrieved from <https://www.cable.co.uk/broadband/speed/worldwide-speed-league>

10 Coral Sea Cable System (n.d.). Retrieved from <https://www.coralseacablesystem.com.au/>

11 PNG DataCo (n.d.). Retrieved from <https://www.pngdataco.com/project/kumul-submarine-cable/>

12 Utz, R (2017). Assessment of the Potential Impact of the ICT Revolution in the Pacific on Economic Growth, Employment, and Government Revenue. Retrieved from <http://pubdocs.worldbank.org/en/471591499149365351/pp-ICT-Revolution.pdf>

13 Hightet, C., Nique, M., Watson, A. H. A. & Wilson, A. (2019). Digital Transformation: The Role of Mobile Technology in Papua New Guinea. GSM Association p 53-54. Retrieved from <https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2019/03/Digital-Transformation-The-Role-of-Mobile-Technology-in-Papua-New-Guinea.pdf>

9. Cross-cutting issues

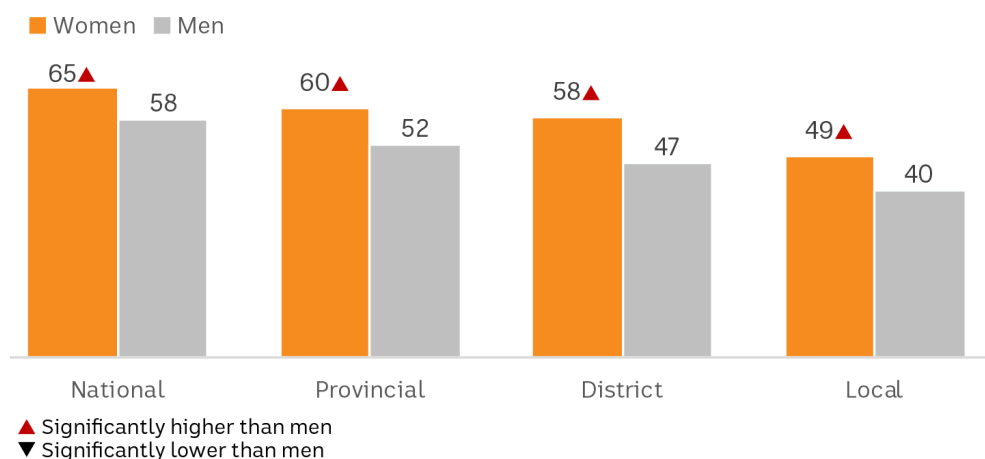
The study aimed to understand and measure cross-cutting issues of gender, youth and people with disabilities. Youth issues have been extensively discussed in the body of this report and to avoid duplication, are not reiterated in this section. A discussion around gender issues, people with disabilities and financial hardship follows.

9.1 Gender issues

As mentioned in earlier sections of this report, the study confirms that gender inequality remains a major issue in PNG. The key challenges for women that were identified in both the survey and the FGDs are summarised as follows:

- Women are less free to voice their opinions and discuss political and social issues
- Women lack influence in local decision-making and have poor representation in leadership positions at any level
- Women have poorer knowledge about important social issues and lower levels of civic engagement than men
- Women find it harder to access education services and police help
- Women have poorer access to media than men across the board
- Lack of access to mobile phones means women stand to gain less from the social, economic, health and education benefits of emerging digital technology

Figure 23. % of women and men surveyed who said they feel they have no influence on government



In addition the study found women have poorer views of governance in PNG. They are more dissatisfied than men with government performance at the national, provincial, and district level, and have lower confidence in elected officials. They also have a stronger perception of 'things worsening' across a range of important issues, from corruption, to economic growth, law and order, opportunities for women and other vulnerable groups (youth and those with disabilities), and the protection of the environment. The FGDs uncovered perceptions that women are susceptible to domestic violence (perpetrated by husbands and sons), threats of physical and sexual violence out of the home, a lack of financial independence and poverty, as well as the consequences of unplanned and unwanted pregnancy. However, respondents showed a reasonably high level of agreement aligned with men when it comes to equality of access to education and employment (see Table 5).

Table 5. Attitudes to gender equality (% strongly agree or agree)

	Women	Men
"Girls and boys have equal access to education"	84	88
"Women and men have equal opportunities to earn a wage"	76	86

Base: All respondents (n=1,539)

It is important to understand that in the FGDs, gender issues were not spontaneously mentioned as a big issue impacting people in PNG. Specifically, the unequal opportunities and share of voice that women generally experienced in PNG were not raised without prompting. Prompting revealed that dominant patrilineal and patriarchal attitudes and structures are perceived within areas beyond Milne Bay and the majority of the New Guinea Island Region. In these areas, it is believed that men are generally more likely than women to:

- Enjoy the majority of status and decisions-making rights in the community;
- Be treated with respect and authority and engage with leaders;
- Offer their personal opinions without fear of reprisals;
- Have access to education and employment;
- Have access to other public services.

Hence, it is only after probing about the role and rights of women that gender issues (beyond personal safety and violence against women) emerged as significant amongst women specifically, and to a lesser extent, amongst men. It is important to note that some men expressed concerns about the lack of opportunity for women's share of voice, participation and access and the lack of safety for women.

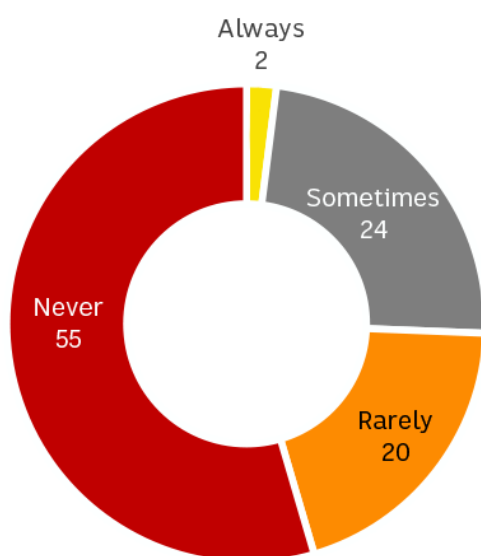
9.2 Issues for people with disabilities

The challenges faced by people with disabilities in PNG were also not spontaneously mentioned as a key issue impacting people in PNG, even by people with a disability. Most people in the sample were aware of, or could empathise with, the challenges faced by the community. People with a disability were generally considered to face many challenges while participating in daily life e.g. mobility, access to services, medical and personal care needs, stigma, lack of access to social opportunities and for some, social exclusion. The study revealed that people with a disability have relatively poorer perceptions of governance at the national level. They expressed concern about the provision of government services (particularly medical care) and housing affordability.

Ten per cent of survey respondents reported with a disability. Vision impairments were the top reported disability (54%), followed by hearing (24%), mobility (24%), and mental health conditions (9%). Fifty-seven per cent of those with a disability also reported that another household member had a disability (compared to an incidence of 19% for the entire sample). Most living with a disability were men (59%), living in Western Highlands province (40%) and in rural accessible/ rural remote zones (59%). Participants with disabilities had less education than the typical participant (18% have no schooling compared to 10% for the entire sample), were more likely to be employed in informal work or subsistence farming/fishing (60%), and were more likely to be living under extreme financial hardship (51% struggle to buy food and/or clothes).

The survey revealed higher dissatisfaction with national government among those with a disability (45% are very unhappy with the government’s performance, compared to 37% of the general sample), as well as lower confidence (54% of those with a disability have "a lot" or "some" confidence in the national government, compared to 66% for the general sample). Three in four (75%) people with a disability felt that they "never" or "rarely" have opportunity to contribute to local decision making.

Figure 24. % of how frequently people with disabilities feel they have a say in local decision making



Key issues for those with a disability were around the provision of government services. The ability to get medical help as well as housing was perceived to be worsening disproportionately for people with a disability. The FGD research also pointed to poor access to public services for those with disabilities (except for church groups that provide dedicated support services for this group). Compounding the above, the findings showed cultural barriers to the inclusion of people with disabilities, including the prevalence of stigma and myths around disabilities (e.g. black magic as a cause of disability). However, media consumption appeared to be similar amongst participants with a disability to that of the majority of the study participants, with no discernible differences found in the survey or arising from the FGDs. Further research is recommended with this important priority group, to delve deeply into issues, information needs, and media accessibility for people with a disability.

9.3 Issues pertaining to financial hardship

The survey captured citizen' views on the degree of household financial hardship they experienced. These findings were then cross tabulated with citizen access to and engagement with media. The purpose of this was not to establish direct causality but to statistically map out how citizens' reported financial hardship could potentially influence their media engagement and consumption patterns.

The metrics utilised for measuring financial hardship were:

Extreme: A lack of money for buying basic necessities (e.g. food, clothes)

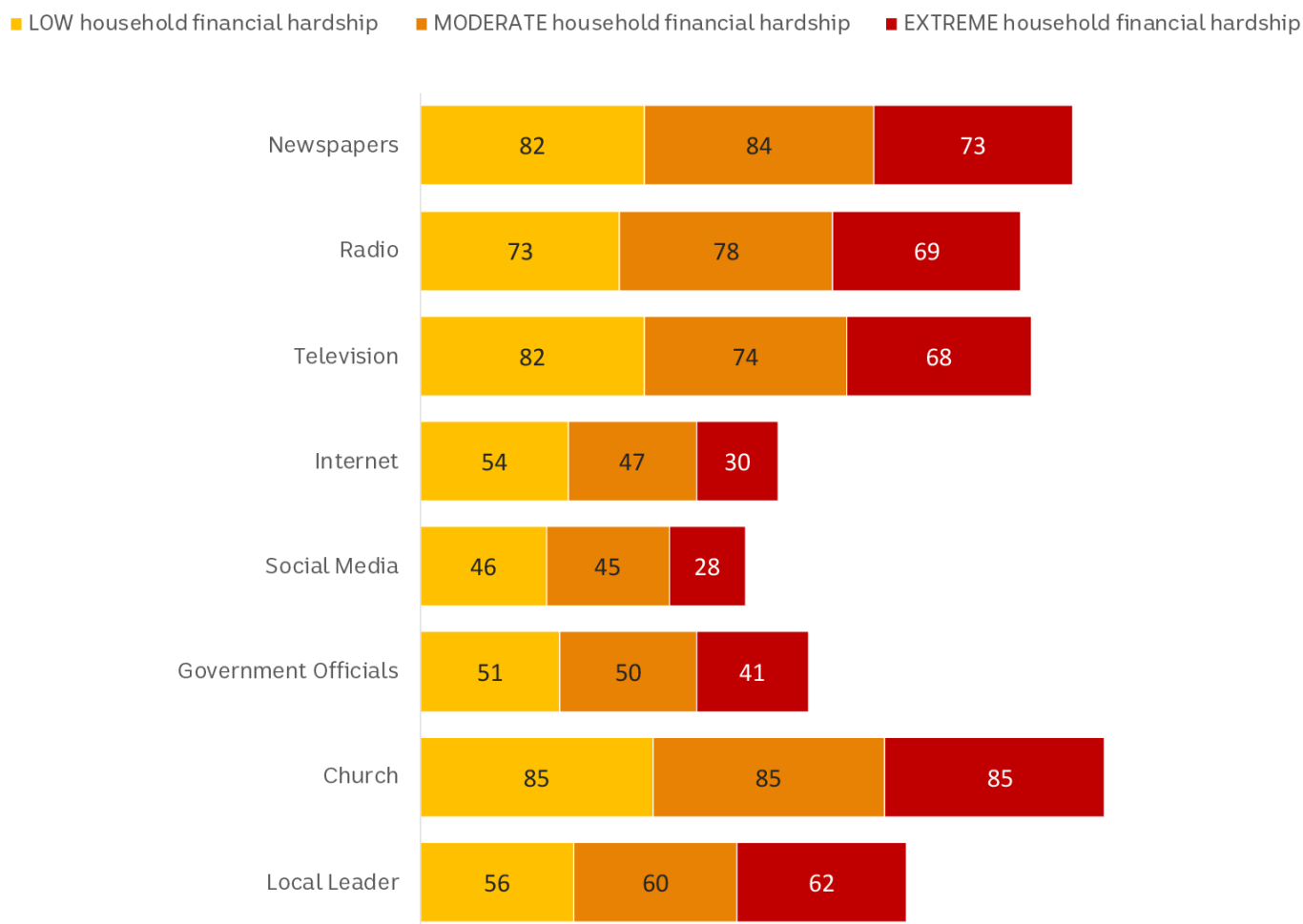
Moderate: Sufficient money for food and clothes but not enough to buy any items outside those which are required for survival (e.g. TV set or refrigerator)

Low: Able to afford modern conveniences such as a TV/refrigerator, and in some cases able to buy anything desired without restriction.

Half (51%) of surveyed citizens identified as experiencing moderate household financial hardship while approximately, one third (35%) identified as experiencing extreme household financial hardship, and 14% of respondents identified as experiencing low household financial hardship.

The findings showed that those living under extreme household financial hardship have less trust in traditional media (newspapers, radio, television) and in digital media (internet, social media) than to those facing low and moderate financial hardship. The church remains the most consistent trusted source of information regardless of financial situation. In contrast, there is significantly low levels of trust in local leaders (relative to other platforms) across all three reported financial situations.

Figure: 25. "Very"/"quite trustworthy" sources of information



Base: All respondents: n=1,539

Respondents residing in households of extreme financial hardship were less likely to be using different sources of media regularly and were less likely to be phone users (27% were non-users compared to 16% of respondents living in moderately financially vulnerable households and 11% of those residing in households with low financial hardship). The lack of cross-platform usage amongst those facing extreme financial hardship, reinforces their propensity to engage with only one or two information sources (e.g. church and newspapers).

Further to the above, from a governance perspective, the findings also suggested that most financially vulnerable people are less happy with government performance at all levels of government and are generally less engaged with politics. Compounding this sense of political detachment, financially vulnerable participants also reported a weaker sense of civic duty.

10. Considerations

The following considerations are based on the reports' findings to inform initiatives that might apprise and engage audiences in PNG.

The implementation of formalised listening mechanisms by government institutions at grassroots/community level

The survey data revealed citizens face a lack of listening from leadership and poor access to government leaders. There were no concerted measures in place to register voices from different groups in society. Leveraging on the popularity of talk-back radio in PNG, formalised consultative platforms hosted by national radio broadcasters could be initiated to encourage citizen engagement with key government officials. This service could be diversified to cater to marginalised sectors of society including women, youth, people with disabilities, and rural residents in locations not typically serviced by broad national-scale consultation platforms.

Aligning the church with media campaign initiatives to capture authentic citizen voices

The survey data showed that the church stands as the most trustworthy source of information for all surveyed citizen groups. Canvassing citizen opinion on bi-partisan community issues through church media (church radio, tv programs and outreach) would give these opinions a sense of credibility, potentially urging key stakeholders and leaders in government to take notice and respond. This recommendation stems from the idea that the church, according to the report, is regarded as the top source of credible information and news, but not necessarily the most frequently used source (i.e. eclipsed by newspapers, radio, and television).

Incorporating new technology to traditional media

Traditional media are considered to provide a quality experience and command a high degree of trustworthiness. However, they need to reinvent themselves to meet the changing needs of a diverse audience market within the context of digital platforms. They need to allocate the resources to facilitate audience engagement across multiple platforms.

Digital and mobile media as tool to enforce transparency and accountability on key government processes

Despite a strong sense of civic engagement, survey findings showed widespread scepticism over governance processes (e.g. elections) and the delivery of services. Media could perform a central function in educating citizens on the objectives and mechanisms behind these processes/services with the intention of upholding transparency. In light of the growing use of digital media and mobile phones in less affluent communities, a low-cost mass messaging system could provide periodic updates to the public on specific government services and processes as they are being formulated and implemented.

Using media (including social media) to mobilise support and raise public awareness around gender inequality and disability

Given that 85% of respondents rated church networks as trustworthy, followed by traditional media forms such as newspapers (80%) and radio (74%), public awareness initiatives could be run across these platforms to convey information around gender inequality and disability. A suite of consistent messaging across church communication networks and mass media would achieve considerable levels of national reach, whilst retaining information credibility. Survey findings also showed that access to social media forms 96% of average citizen activity online. Social media platforms such as Facebook could be used to feature/showcase (1) narratives of empowerment i.e. women's participation in decision making, and (2) disability inclusion in civic participation. Given that Facebook is predominantly used by citizens to post life stories, a similar concept could be formulated to capture slice-of-life narratives of inspirational people who have navigated their way through challenging circumstances due to gender inequality or a disability.

Prioritising infrastructural development around internet performance, connectivity, and reliability

With continued heavy reliance on the internet for communication and news, more work could be done to ensure that internet connections undergo sanctioned periodic testing. This would ensure that there are no reception or bandwidth issues amidst rising national usage.

Investing in youth driven-content on TV around civic issues

Strategies are required to keep younger people engaged with important issues. The findings showed that younger participants (under 25 years) were more likely to consume TV than any other generational group. News and current affairs were the most frequently accessed content types across all demographic groups for people this age. TV presents an ideal platform to bring young people to the fore of public discussion and civic engagement. More investment could be directed towards the production of youth-targeted current affairs and news content that addresses key social issues faced by young people. Youth presenters could also be utilised to engage with young people as a way of including them in national debates and conversations. Online publications or affordable print newspapers with youth-oriented topics can also be explored as potential media platforms to engage youth.

Iterative research approach

Ideally, this study would further benefit from an iterative research approach, where the FGDs insights inform the development of a survey instrument. If time and budget permit, this would be the recommended approach for future studies of this type

Length of interviews

It is noted that while the length of interview for the survey was piloted to ensure it did not exceed 30 minutes, in the field, many interviews exceeded the allocated time. This was due to a range of issues including interruptions, the need to repeat each question at the research participants rather than request, and in some instances, the slow pace of responses.

Migrating paper surveys to online and smart phone-compatible surveys

While considerable investment is required to develop a reliable database of PNG citizens' mobile phone and email addresses, we would recommend consideration of a national research-specific database (with strict privacy protection) to enable the gradual migration away from paper-based interviews toward online surveys (administered via mobile phone and email) where available. This migration to a new technology-based method will initially produce methodological challenges that would require reconciling. However, the long-term trade-offs would be a reduction in interviewer errors and biases (present in all face-to-face studies), the potential to be more specific when sampling for surveys, and would be more time and cost effective in the longer term.

11. Methodology

Due to time and budget imperatives, this two-part research study was comprised of a large-scale quantitative survey plus a small scale qualitative FGD research, designed and executed concurrently. Stancombe Research + Planning worked closely with ABCID and DCPD to design a discussion guide for the FGDs and a quantitative questionnaire to address the key research objectives. The method and sample for each research approach are discussed in the following section.

11.1 Quantitative survey

The 30-minute, paper-based, quantitative questionnaire was administered face-to-face across six provinces: Central, Morobe, Western Highland Province (WHP), West New Britain (WNB), West Sepik and Manus. Most interviews (85%) were conducted in Tok Pisin, 10% were conducted in English, 3% were conducted in both Tok Pisin and English, and 2% were conducted in local languages. Fieldwork was conducted by Anglo Pacific Research (APR), after briefing, training and piloting under Stancombe Research + Planning. A list of primary sampling units (PSUs) were selected for each location to ensure broad population coverage. Each respondent was quasi-randomly selected on the basis of age and sex within each of the randomly located PSUs. The fieldwork team comprised two supervisors (a male and a female) and six interviewers (three female and three male) to ensure same-sex interviewing was conducted.

A total of n=1,539 respondents were sourced across the included provinces (the sample was designed to be equally distributed between regions, provinces, and zones: urban, peri-urban, rural accessible and rural remote). All citizens aged 18 years and over were eligible to participate, and the respondent profile is representative of the PNG population by age and gender¹⁴.

Survey data was weighted to reflect the actual population size of each province¹⁵. The margin of error for the survey at the total sample level was $\pm 2.5\%$ (Table 6).

A note on figures reported in this document: where data for a chart appears to total 99% or 101% (rather than 100%), this is due to rounding error (i.e. figures reported are rounded to the nearest whole number, and without decimals may appear to sum to 99% or 101%, when in fact they sum to 100%).

¹⁴ National Statistical Office Papua New Guinea (2011). National Report. Retrieved from <https://www.nso.gov.pg/>

¹⁵ Webster, T., Kutan, L., Somo, M. & George, M. (2010). Papua New Guinea District and Provincial Profiles. The National Research Institute. Boroko, PNG

Table 6. Quantitative survey sample profile

		% (unweighted)	% (weighted)
Province	Morobe	17	30
	Central	17	24
	Western Highlands	17	24
	West New Britain	17	10
	West Sepik	17	10
	Manus	17	2
District	Talasea	17	10
	Mul-Buiyer Lumusa	2	3
	Nawaeb	2	3
	Manus	9	2
	Other	71	82
Zone	Urban	26	26
	Rural peri-urban	25	25
	Rural accessible	24	24
	Rural remote	25	26
Age	18 to 24 years	25	25
	25 to 34 years	28	28
	35 to 44 years	23	23
	45 to 54 years	17	17
	55 years plus	7	7
Sex	Female	50	50
	Male	50	50
Languages	Tok Pisin	99	99
	English	71	67
	Hiri Motu	12	17
	Other	49	49

11.2 Qualitative focus group discussions

The qualitative research component adopted a micro-focused approach in seeking a nuanced understanding of the attitudes and opinions of urban-based citizens of PNG, facilitated by a series of open-ended questions. The FGD research included twelve (12) two-hour FGDs conducted across the same provinces, although the sample was confined to urban areas only. The qualitative research sample is schematised below:

Table 7. Qualitative FGD research sample

Group #	Province	Location	Age	Sex
1*	NCD / Central	Port Moresby	18 - 24	Female
2	NCD / Central	Port Moresby	40+	Male
3	Western Highlands	Mt Hagen	25 - 39	Female
4	Western Highlands	Mt Hagen	18 - 24	Male
5	Morobe	Lae	40+	Female
6	Morobe	Lae	25 - 39	Male
7*	West New Britain	Kimbe	18 - 24	Female
8*#	West New Britain	Kimbe	40+	Male
9	West Sepik	Vanimo	25 - 39	Female
10	West Sepik	Vanimo	18 - 24	Male
11^	Manus	Lorengau	40+	Female
12	Manus	Lorengau	25 - 39	Male

* These group discussions included one respondent with either a physical disability, vision impairment, or hearing impairment.^ One participant was treasurer for the local Ward Council. # One participant was a Ward Council in Kimbe Town.

The FGDs were exploratory and the majority of the FGDs were conducted in Tok Pisin; the two group discussions conducted in Port Moresby were largely conducted in English, with some Tok Pisin spoken. The researchers conducting the group discussions were the same sex as the participants.

Audio from Tok Pisin group discussions was recorded and transcribed into English for analysis. The translations may have resulted in some minor adjustments to the original meaning of the comment, yet all care has been taken to ensure accuracy of translation.

The reader is advised to be aware that the qualitative FGD sample is a small-scale sample and does not include citizens who reside outside of urban areas of the six provinces sampled, and as such, does not directly reflect the quantitative survey sample. The insights generated from this phase of research need to be treated as indicative rather than definitive. Where any discrepancies between the insights derived from qualitative phase and the quantitative phase of research, this can be attributed to differences in method, sample size, and sample composition.

12. References

Cable (2018). World Broadband Speed League.

Retrieved from <https://www.cable.co.uk/broadband/speed/worldwide-speed-league>

Coral Sea Cable System (n.d.). Retrieved from <https://www.coralseacablesystem.com.au/>

Curry G.N., Dumu E., Koczberski G. (2016). Bridging the Digital Divide: Everyday Use of Mobile Phones Among Market Sellers in Papua New Guinea. In: Robertson M. (eds) Communicating, Networking: Interacting. Springer Briefs in Global Understanding. Springer,

ChamDebeljak, K (2014). Citizen Access to Information in Papua New Guinea.

Retrieved from <https://www.abc.net.au/cm/lb/9080250/data/report--citizen-access-to-information-in-png-2014-data.pdf>

Highet, C., Nique, M., Watson, A. H. A. & Wilson, A. (2019). Digital Transformation: The Role of Mobile Technology in Papua New Guinea. GSM Association. Retrieved from

<https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2019/03/Digital-Transformation-The-Role-of-Mobile-Technology-in-Papua-New-Guinea.pdf>

Lyons, K. (2019). I will eventually be killed: Meet Bryan Kramer, Papua New Guinea's anti-corruption tsar. Retrieved from

<https://www.theguardian.com/world/2019/aug/11/i-will-eventually-get-killed-meet-bryan-kramer-papua-new-guineas-anti-corruption-tsar>

Lyons, K. (2019). Papua New Guinea's prime minister, Peter O'Neill, resigns. Retrieved from

<https://www.theguardian.com/world/2019/may/26/papua-new-guineas-prime-minister-peter-oneill-resigns>

National Statistical Office Papua New Guinea (2011). National Report. Retrieved from <https://www.nso.gov.pg/>

Ombudsman Commission of Papua New Guinea (2018). Retrieved from

<https://asopa.typepad.com/files/alleged-improper-borrowing-of-au1-239-billion-loan-from-the-union-bank-of-switzerland-ubs-report.pdf>

Pacific Islands Forum Secretariat (n.d.). Retrieved from <https://www.forumsec.org/>

PNG DataCo (n.d.). Retrieved from <https://www.pngdataco.com/project/kumul-submarine-cable/>

Trading Economics (n.d.). Retrieved from <https://tradingeconomics.com/papua-new-guinea/corruption-rank>

Utz, R (2017). Assessment of the Potential Impact of the ICT Revolution in the Pacific on Economic Growth, Employment, and Government Revenue. Retrieved from <http://pubdocs.worldbank.org/en/471591499149365351/pp-ICT-Revolution.pdf>

Webster, T., Kutan, L., Somo, M. & George, M. (2010). Papua New Guinea District and Provincial Profiles. The National Research Institute.

Boroko, PNG World Bank (2019). Papua New Guinea – Slower Growth, Better Prospects.

Retrieved from <https://www.worldbank.org/en/country/png/publication/papua-new-guinea-slower-growth-better-prospects>

World Bank (2016). Papua New Guinea: Reading for a Better Future. Retrieved from <https://www.worldbank.org/en/results/2016/05/12/papua-new-guinea-reading-for-a-better-future>