

# Citizen Access to Information in Papua New Guinea 2014



## Foreword

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

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

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

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

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

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



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

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

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

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

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# Glossary

## **BASE**

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

## **BOOMBOX**

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

## **GARAMUT**

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

## **HAUS PIKSA**

House Picture (A village cinema house).

## **MEDIA ACCESS**

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

## **MEDIA CONSUMPTION**

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

## **NATIONAL**

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

## **REACH**

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

## **TRIBE FM**

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

## **YOUTH**

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

## **YUMI GO WER?**

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

# Acronyms and Abbreviations

**ABC**

Australian Broadcasting Corporation

**ABC ID**

Australian Broadcasting Corporation  
International Development

**BBC**

British Broadcasting Corporation

**DFAT**

Department of Foreign Affairs and Trade

**FM**

Frequency Modulation

**IMF**

International Monetary Fund

**NBC**

National Broadcasting Corporation  
of Papua New Guinea

**NGO**

Non-Government Organisation

**NRL**

National Rugby League

**PACMAS**

The Pacific Media Assistance Scheme

**PNG**

Papua New Guinea

**SMS**

Short Message Service

**SW**

Short wave

**US**

United States of America

**WHO**

World Health Organization

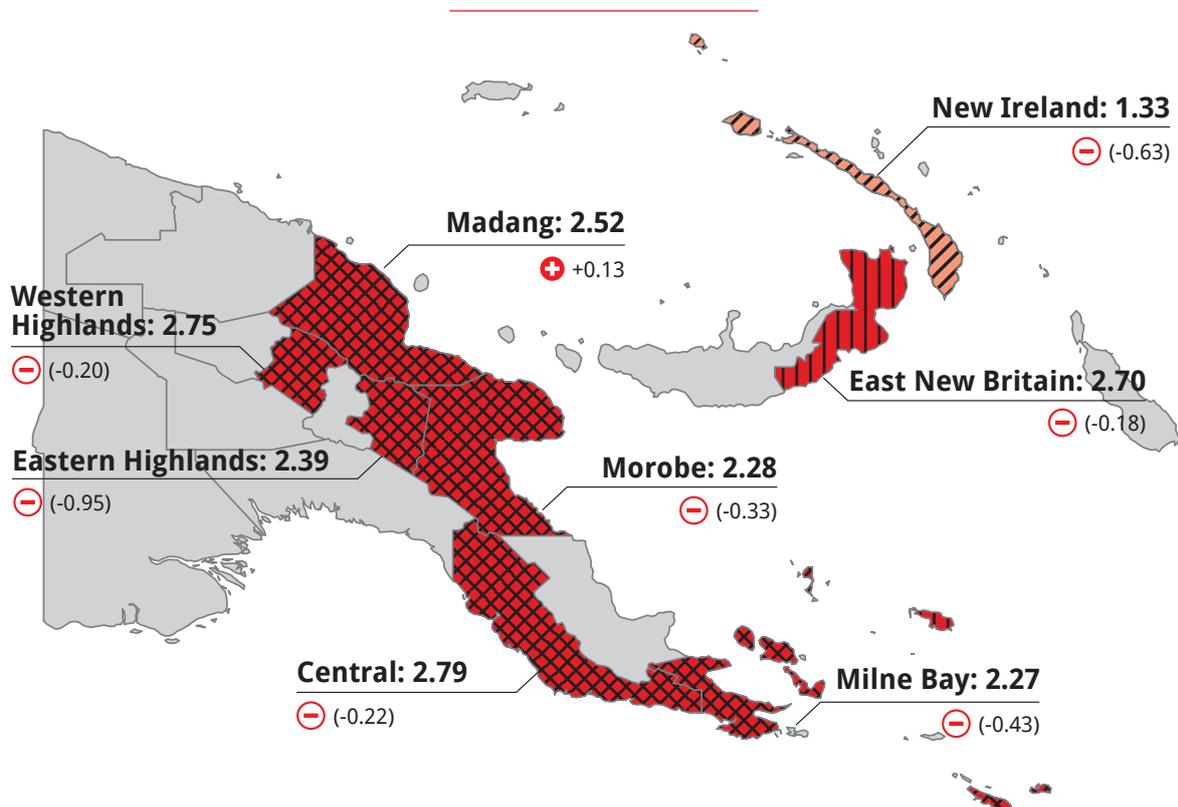
# Executive Summary

## NEW DEVELOPMENTS

### FALL IN THE OVERALL MEDIA ACCESS AND USE

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

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



**Bold Index Score:**

The Total Media Index Score (based on Media Access Index and Media Use Index)

**Un-bolded score in brackets:  
The change in Total Media Index Score since 2011/12**

- ⊖ Negative change
- ⊕ Positive change

**Media Access Index:**

0-1.00	Very Low
1.00-2.00	Low
2.01-3.00	Medium
3.01-4.00	High
4.01-5.00	Very High

**Media Use Index:**

0-1.00	Very Low
1.01-2.00	Low
2.01-3.00	Medium
3.01-4.00	High
4.01-5.00	Very High

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

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

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

### **IN URBAN CENTRES TV SURPASSES RADIO AS AUDIENCE PREFERENCE**

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

### **MOBILE PHONE USE DECLINES IN SOME PROVINCES**

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

## **CONTINUING CHALLENGES**

### **MEDIA CONSUMPTION STILL LARGELY DICTATED BY MEDIA ACCESS**

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

### **HOUSEHOLD MEDIA DEVICES REMAIN CONTROLLED BY MEN**

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

### **SIGNAL STILL ONE OF THE MAIN BARRIERS TO NBC RADIO LISTENING**

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

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

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

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

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

### **TRIBE FM WITH LIMITED RECOGNITION AMONG THE TARGET AUDIENCE**

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

## **EMERGING FINDINGS**

### **CHURCHES EMERGE AS THE MOST TRUSTED SOURCE OF INFORMATION**

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

### **STRONG INTEREST IN YUMI GO WER?, BUT AWARENESS LOW**

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

## **FUTURE TRENDS**

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

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

### **TRUST IN NEW MEDIA TO IMPROVE WITH INCREASING USE**

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

### **RAPID RISE OF SOCIAL MEDIA**

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

### **CONTINUING GROWTH OF MOBILE INTERNET USE**

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

## **DISASTER BROADCASTING**

### **LOW OVERALL PREPAREDNESS FOR NATURAL DISASTERS**

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

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

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

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

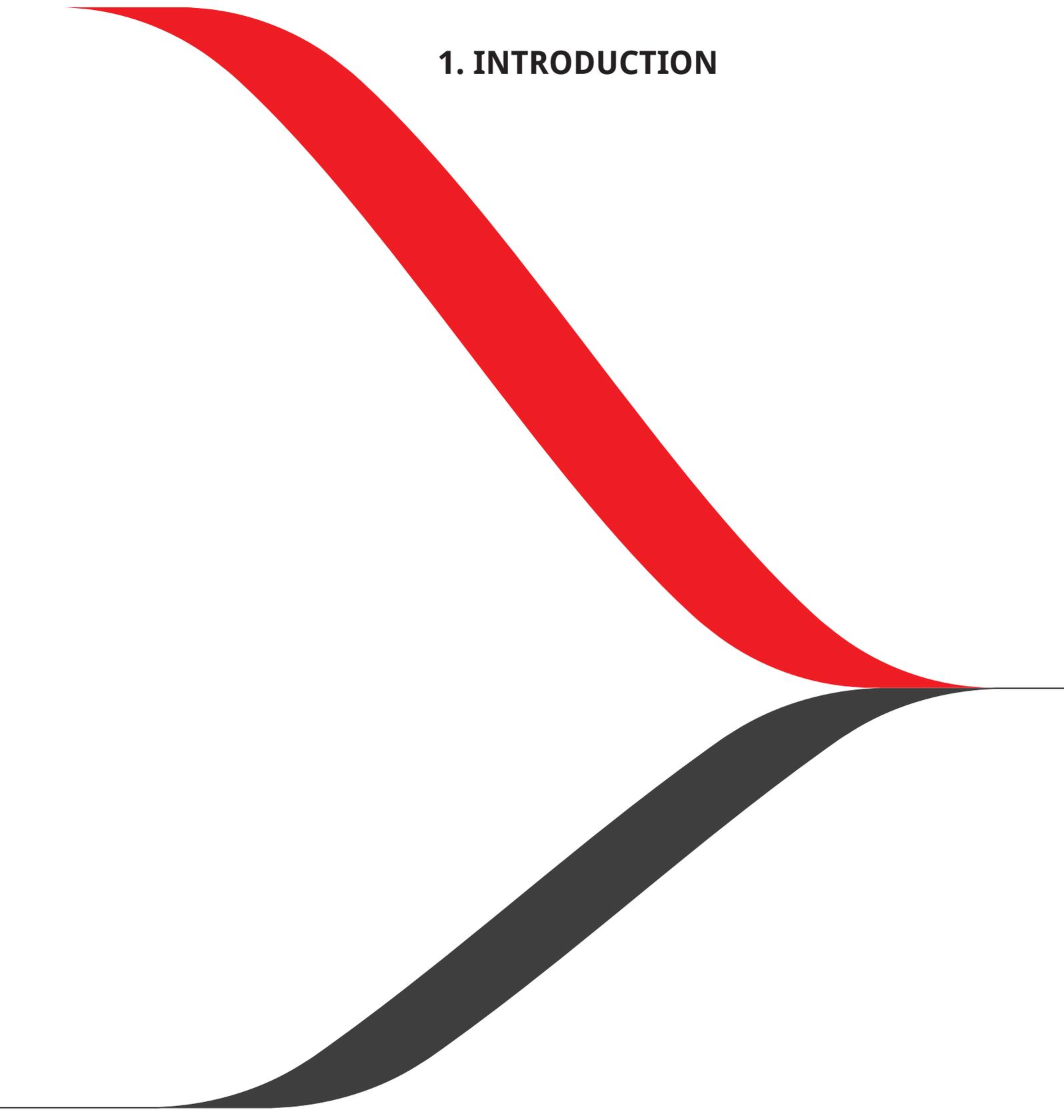
Radio is the main source of information on natural disasters for about three quarters of all PNG citizens, followed by friends and family with 56%<sup>1</sup>. However, information provided by radio stations is typically limited to warnings about impending natural disasters during weather reports and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

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

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

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<sup>1</sup> n = 1,303 respondents

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

# 1. INTRODUCTION

| The 2014 Citizen Access to Information in Papua New Guinea study was conducted between April and August 2014, as a follow-up to a similar research study implemented in 2011/12.<sup>2</sup> The 2014 study had the following key objectives:

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

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

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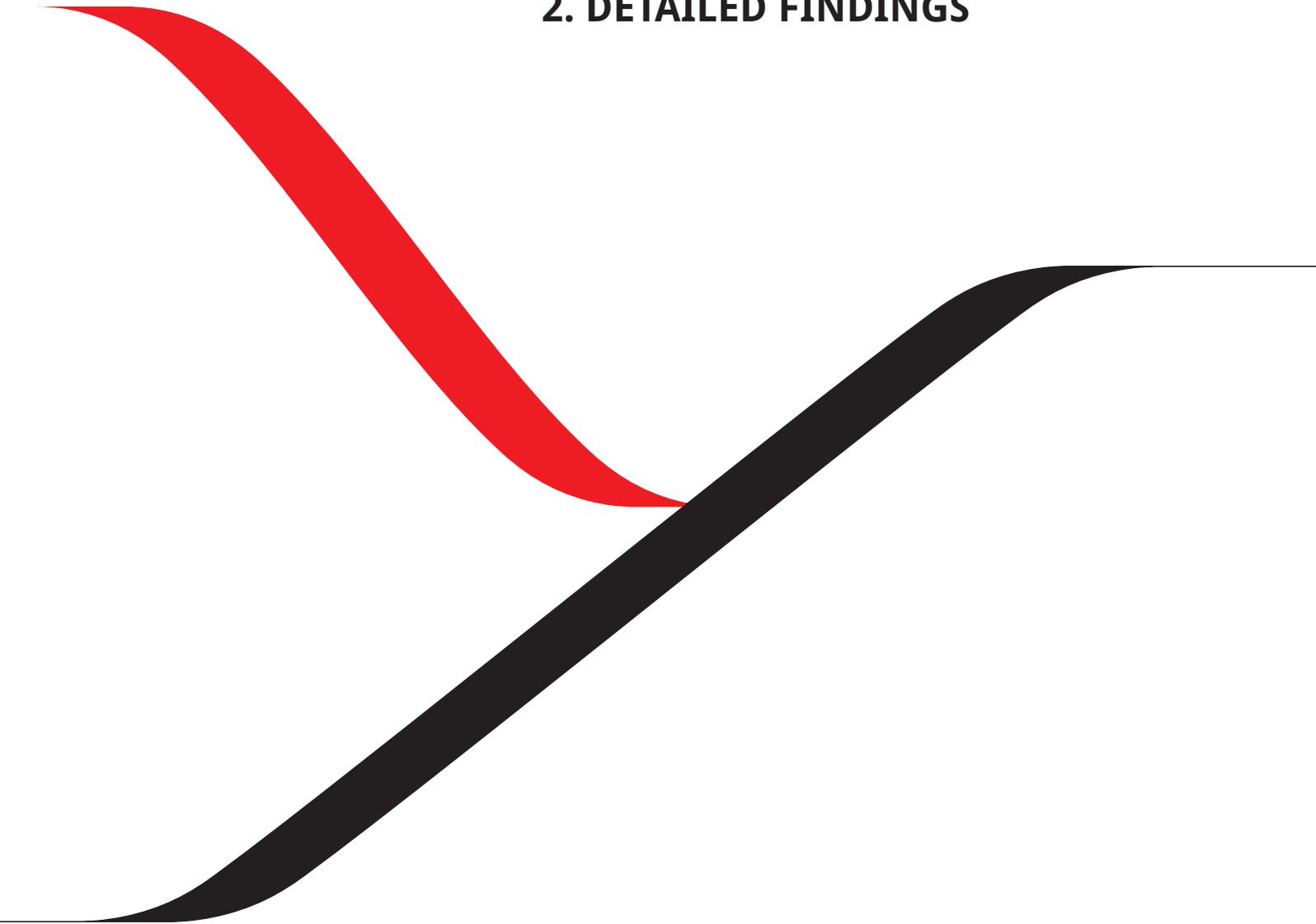
2 ABC International Development, InterMedia. (2012). *Citizen Access to Information in Papua New Guinea 2012*. Retrieved November 9, 2014, from ABC International Development: <http://www.abcinternationaldevelopment.net.au/activities/citizen-access-informati%20on-papua-new-guinea-2012>

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

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

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

## 2. DETAILED FINDINGS



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

### 2.1.1. MEDIA ACCESS AND CONTROL

| The period between 2011/12 and 2014 saw significant changes<sup>3</sup> in the level of household access to different media types in Papua New Guinea, led by a considerably reduced dominance of **radio** as the most widely owned mass media device in the country (see Figure 2). This significant fall may be linked to three factors: a worsening signal in several provinces, falling interest in radio among the youth, and increased overall access to TV and internet in some provinces. For example, Western Highlands, which recorded a 13% drop in household access to the radio since the 2011/12 study, at the same time saw a 19% increase in home access to TV and a 9% increase in access to the internet.

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

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

| The most significant change was observed in **New Ireland** which saw a reduced household access to all media devices, except the internet. This is particularly concerning as the province had already been identified as the most media poor part of the country in the 2011/12 study, with its residents having the least access to different media devices among all eight provinces included in the research. In 2014 only 36% of all respondents<sup>6</sup> from New Ireland reported having a radio in the household, compared to 64% or more in each of the other provinces. Only 2% of New Ireland residents own a TV, which is the lowest share among all parts of PNG.

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

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

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

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

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

6 n = 161

which overall produces 37% of all coffee in PNG,<sup>7</sup> has likely been affected by two important developments since the 2011/12 study – a significant reduction in the overall production of coffee in PNG and falling coffee prices in the global market. According to International Coffee Organization, the average coffee price fell from 210.49 US cents per pound of coffee in 2011, to 156.34 US cents in 2012, and decreased further to 119.51 US cents in 2013, representing an overall fall of 43% since 2011.<sup>8</sup> Furthermore, the overall coffee production in Papua New Guinea halved from 2011 to 2012 (from a record 1.4 million bags in 2011 to 0.7 million in 2012) and has failed to rise back to the previous record level in 2013, with 0.8 million bags produced in 2013.<sup>9</sup> Lastly, citizens' disposable incomes were further affected by the rising inflation, which on a national level rose from 2.2% in 2012 to 6% in 2014<sup>10</sup>.

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

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

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

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

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

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

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

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

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

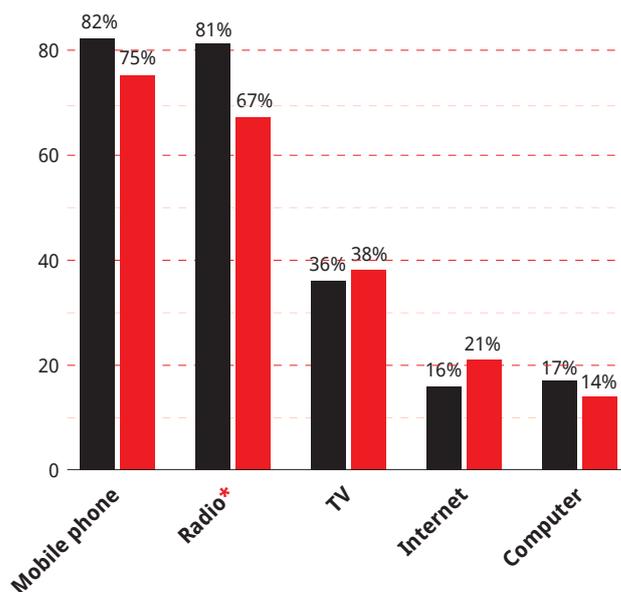
11 n = 84 respondents in Morobe who personally own a mobile phone

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

13 n = 842 respondents who personally own a mobile phone

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

**Figure 2:  
Household media access**



■ 2011/12

■ 2014

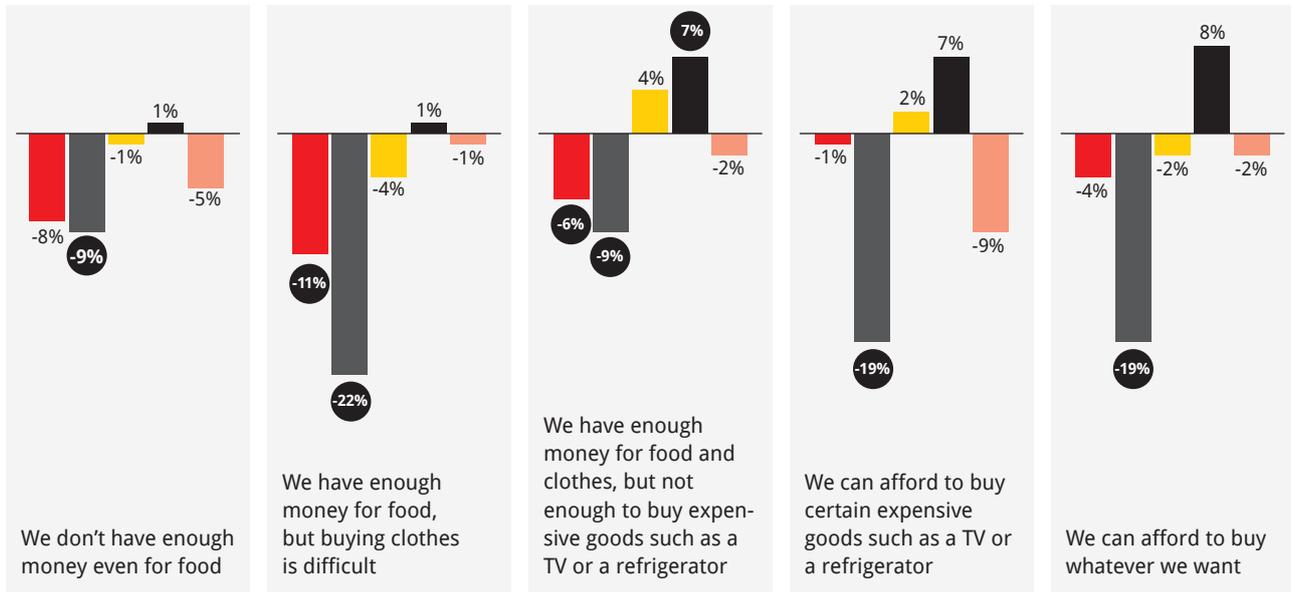
\* This includes a radio set in the household, radio on a mobile phone and car radio.

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

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

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

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



■ Mobile phone   
 ■ Radio   
 ■ TV   
 ■ Internet   
 ■ Computer

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

x% Statistically significant changes

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

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

| Interestingly, the only media device that saw a notable change in this area since 2011/12 is the internet. In 2014, both men and women reported an improved level of control over how the internet is used in their home compared to 2011/12. However, the gender gap in internet control within the household narrowed significantly. In the 2011/12 study, only 49% of all women with internet in their household<sup>14</sup> reported that they control its use; in 2014 this share increased to 80%.<sup>15</sup> Men reported

14 n = 99

15 n = 128

a similar, but smaller increase from 79% in 2011/12<sup>16</sup> to 91% in 2014.<sup>17</sup> This also suggests that more respondents – men and women – now use more personalised devices with access to the internet (e.g. internet enabled mobile phones rather than computers) than three years ago, which gives the users greater freedom over how and when they access the internet.

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

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

Female
  Male

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

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

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

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

16 n = 113

17 n = 140

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

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

Most media control  Least media control

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

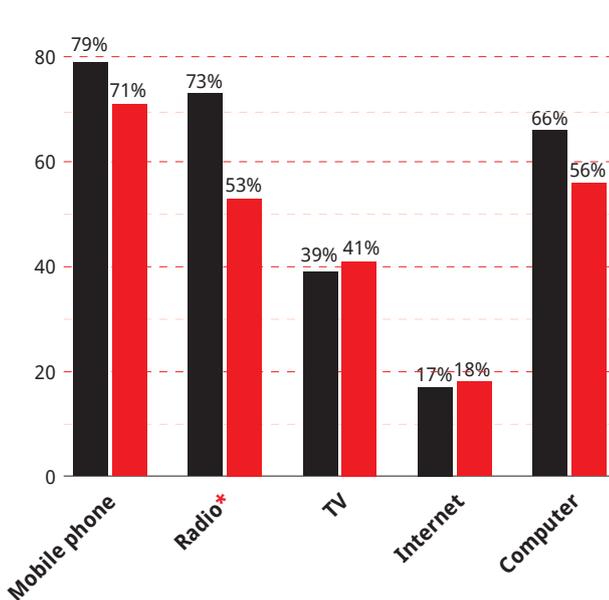
## 2.1.2. MEDIA CONSUMPTION PATTERNS

### 2.1.2.1. OVERALL MEDIA USE

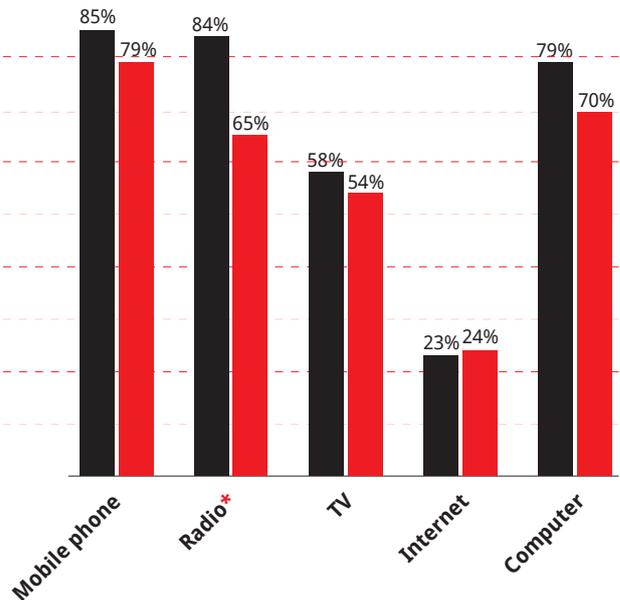
| In line with the findings of the 2011/12 PNG audience study, consumption of different media continues to remain largely a function of media access, rather than choice. This is the case particularly in rural areas, where media access remains limited by poor infrastructure and weak signals (for radio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

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

**Figure 4:  
Weekly media use**



**Figure 5:  
Annual media use**



18 TV use significantly decreased only on the annual level.

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

### INFRASTRUCTURAL CHALLENGES

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

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

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

Morobe, male non-listener, 18–24

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

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

### FALLING INTEREST IN RADIO AMONG YOUTH

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

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

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

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

Mount Hagen, male non-regular listener, 25+

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

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

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

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

Port Moresby, female regular listener, 18–24

### **COST**

Finally, qualitative research also suggests that cost may be another factor contributing to these trends, and may explain the decline in newspaper readership and regular mobile use. As reported by the IMF,<sup>21</sup> PNG’s inflation rose repeatedly over the last three years, with average consumer prices rising 2.2% in 2012, 3.8% in 2013 and 6% in 2014.<sup>22</sup> In light of the rising cost of living, some PNG citizens may have cut down on non-essential expenses, including the funds allocated to the purchase of print media and talk time for mobile phones.

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

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

Mount Hagen, male regular listener, 25+

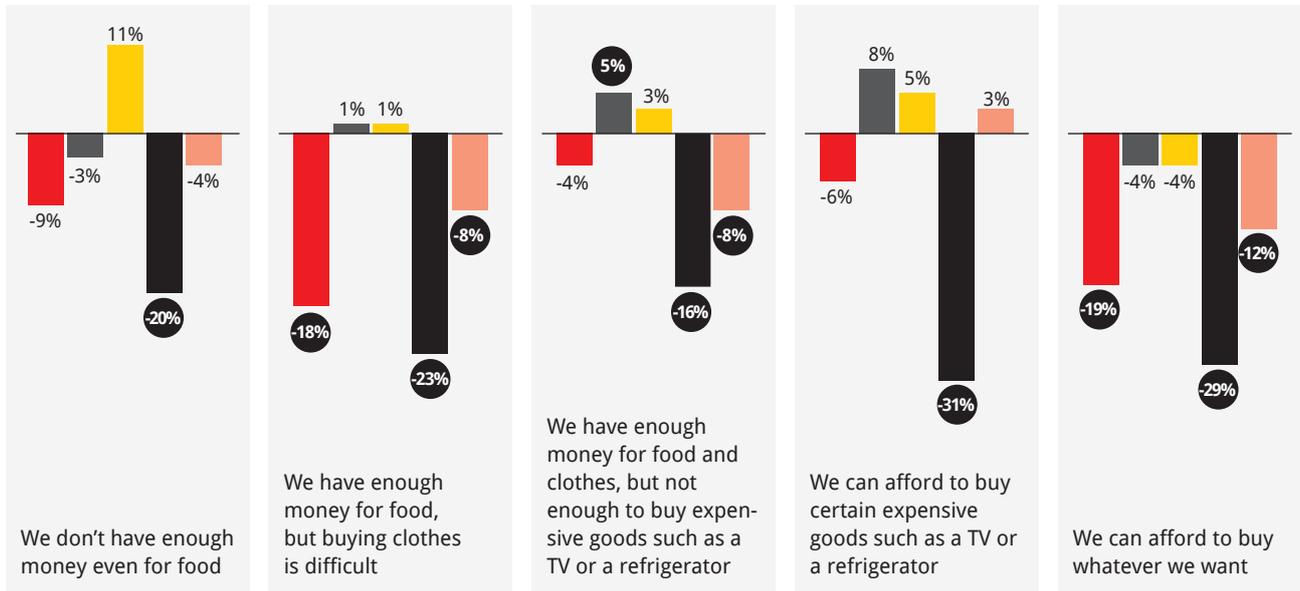
| Regular mobile use and newspaper readership fell across all income levels (Figure 5A – only the changes shown in red are statistically significant). Weekly radio use recorded a significant drop among all income classes, while regular TV and internet use remained stable among all these groups.

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

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

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



■ Newspaper   
 ■ Internet   
 ■ TV   
 ■ Radio   
 ■ Mobile phone

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

x% Statistically significant changes

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

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

Morobe, male non-listener, 18–24

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

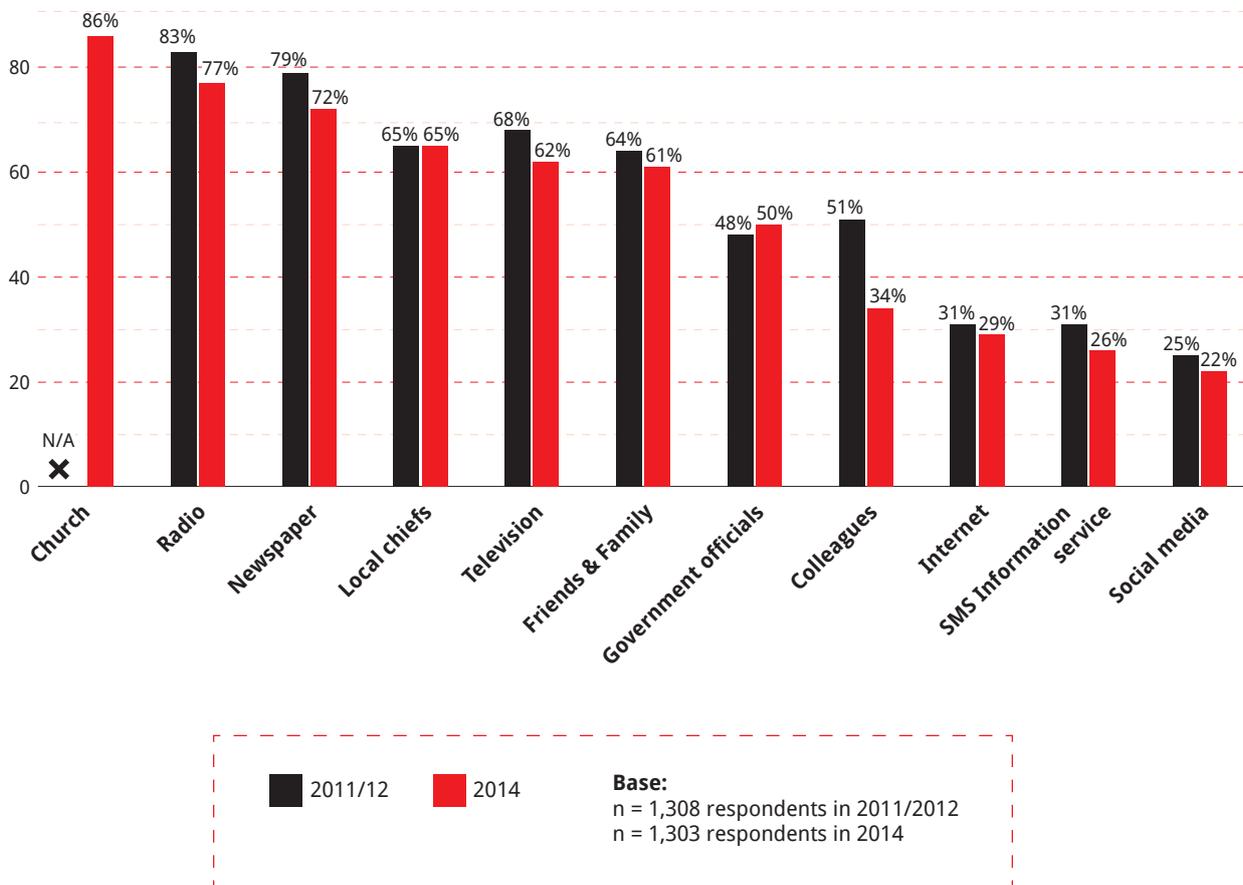
*“Because my form of work is on a hire basis, if I’m hired to do something, I just get up [in the morning], have a small bite and then I’m gone. And [for] the rest of the day, if I have nothing to do, I just [sit] around the house, looking for things to do or looking for nothing to do. I try to read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

Port Moresby, regular male listener, 25+

## 2.1.2.2. TRUST IN INFORMATION SOURCES

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

**Figure 6:**  
**Trust in information sources**



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

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

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

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

Port Moresby, male regular listener, 25+

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

Mount Hagen, female regular listener, 18–24

| Conversely, PNG citizens continue to put the least trust in “newer” sources of information, such as the **internet**, **social media** and **SMS information services**. This is likely a consequence of their lack of familiarity with these sources. For example, trust in the internet among those who use it regularly<sup>24</sup> is considerably higher than trust among the PNG citizens overall (70% compared to 29%, respectively). As research from many other developing countries suggests, this picture is likely to shift significantly as access to and use of these sources increases.

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24 n = 238 weekly users of internet

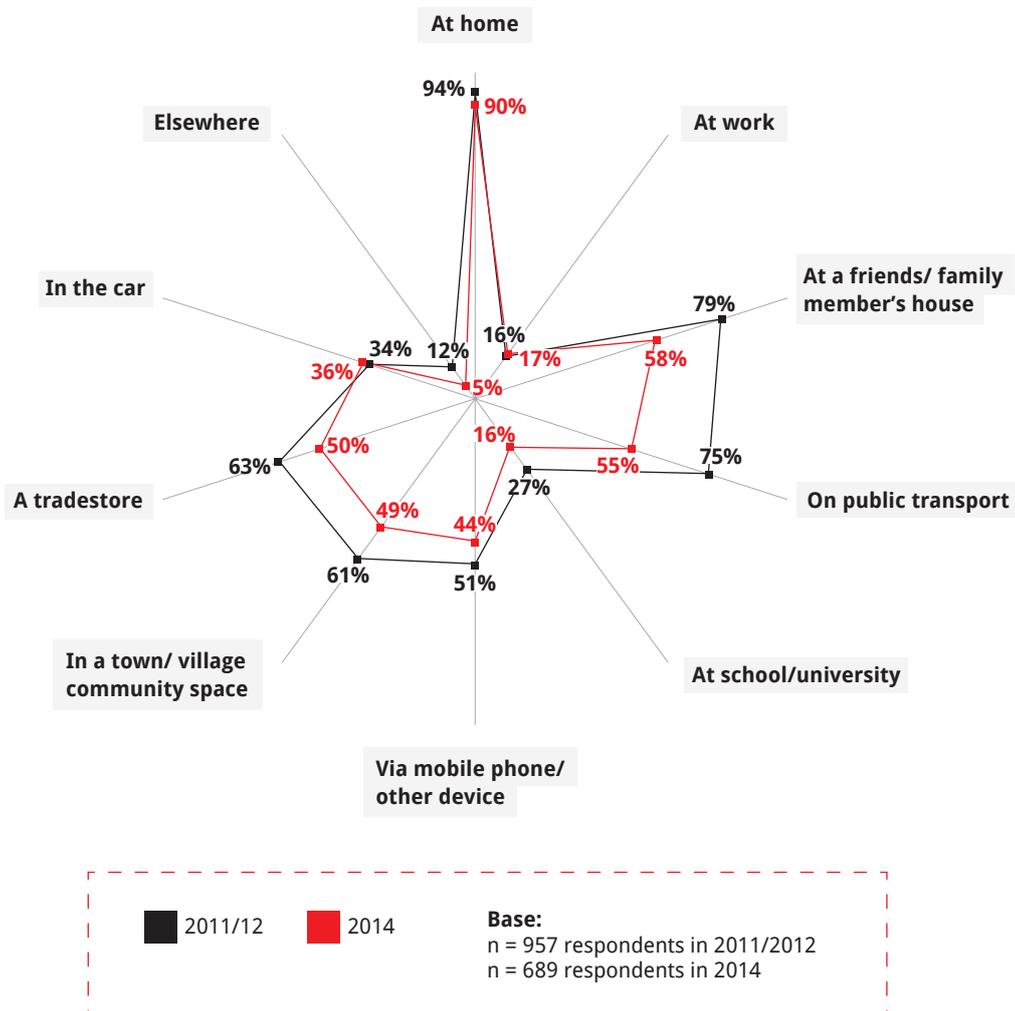
### 2.1.2.3. RADIO LISTENING HABITS

#### REDUCED EXPOSURE AMONG REGULAR LISTENERS

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

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

**Figure 7:  
Locations of radio listening**



| The home remains the primary place for regular listeners to tune into the radio,<sup>25</sup> while communal radio listening among the weekly audience declined significantly. Public transport now represents an opportunity to listen to the radio for only 55% of all weekly radio listeners<sup>26</sup>, compared to 75% in 2011/12.<sup>27</sup> Similarly, 58% access the radio at a friend or family member’s house, down from 79% in 2011/12.

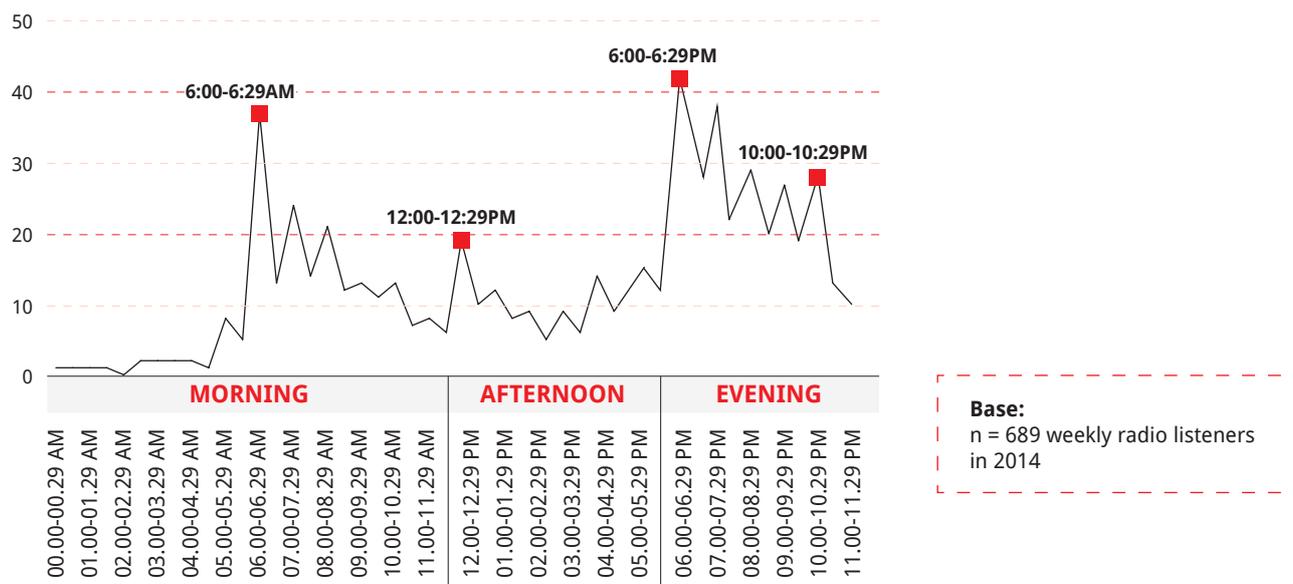
| Listening at school or university, trade store or in a public space also fell, albeit to a lesser extent. The slight drop in listening to the radio on mobile phones can be linked to somewhat reduced overall ownership of mobile phones across the four regions.

### EARLY MORNING AND EARLY EVENING PEAK LISTENING TIMES

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

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

**Figure 7A:  
Radio listening times**

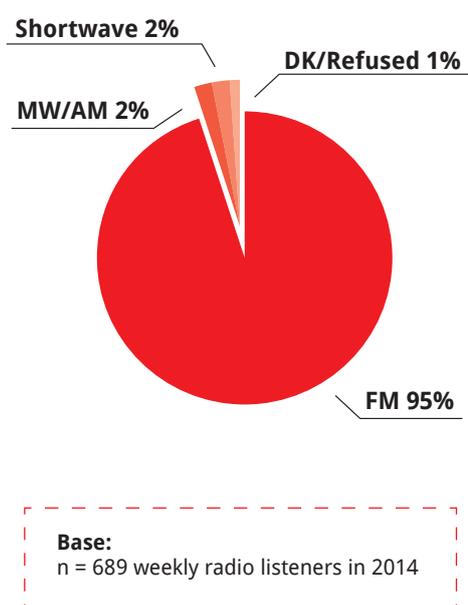


25 The share of those who listen at home remained broadly unchanged, however, please note that the drop from 94% to 90% from 2011/12 to 2014 is statistically significant.  
 26 n = 689 weekly radio listeners in 2014  
 27 n = 957 weekly radio listeners in 2011/12

### FM RADIO STATIONS CONTINUE TO DOMINATE PNG RADIO MARKET

FM radio remains the dominant waveband in the PNG radio space, with less than 5% of all weekly radio listeners tuning into radio programming on any other frequency band (Figure 8). This confirms the results from the 2011/12 study, where 94% of the regular radio audience<sup>28</sup> noted they listen to their preferred stations on an FM frequency. It is important to note that this is most likely the result of limited availability of different frequencies, rather than listeners' choice.

**Figure 8:  
Wavebands of radio listening**



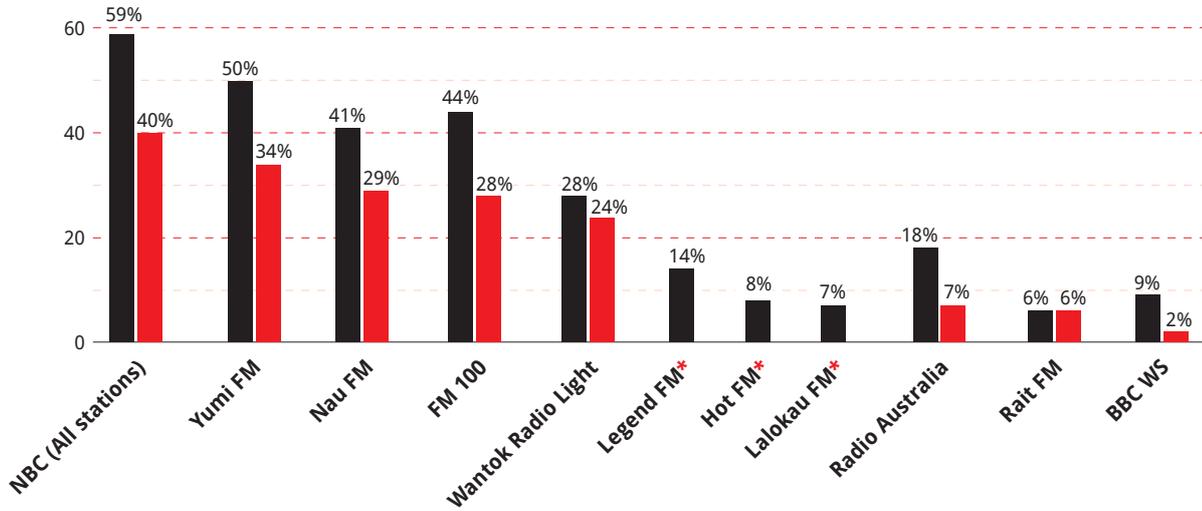
### NBC STILL THE RADIO LEADER NATIONALLY, BUT LAGGING BEHIND COMPETITORS IN CENTRAL, MOROBE AND WESTERN HIGHLANDS

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

28 n = 957 weekly radio listeners

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

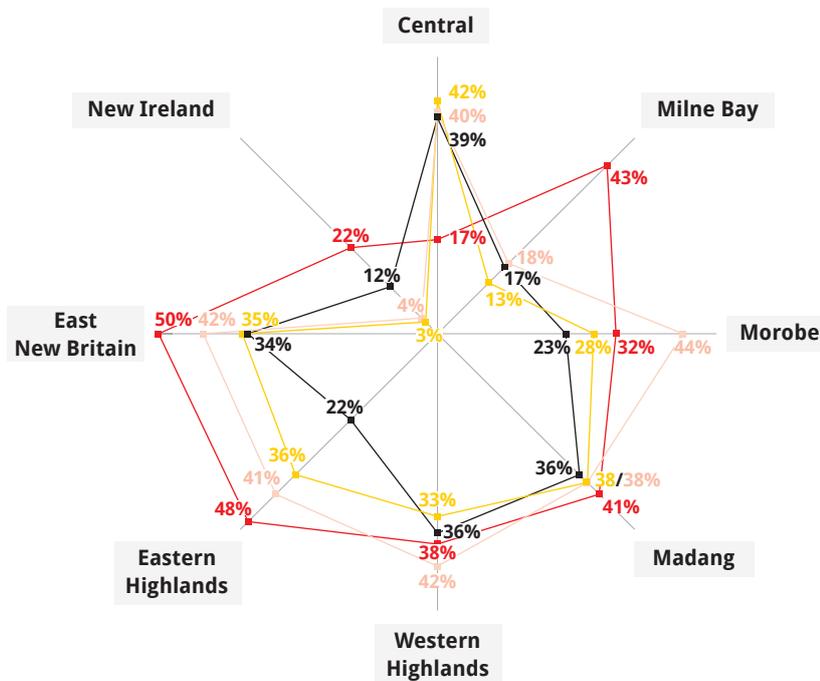
**Figure 9:  
Weekly reach of radio stations**



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

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

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

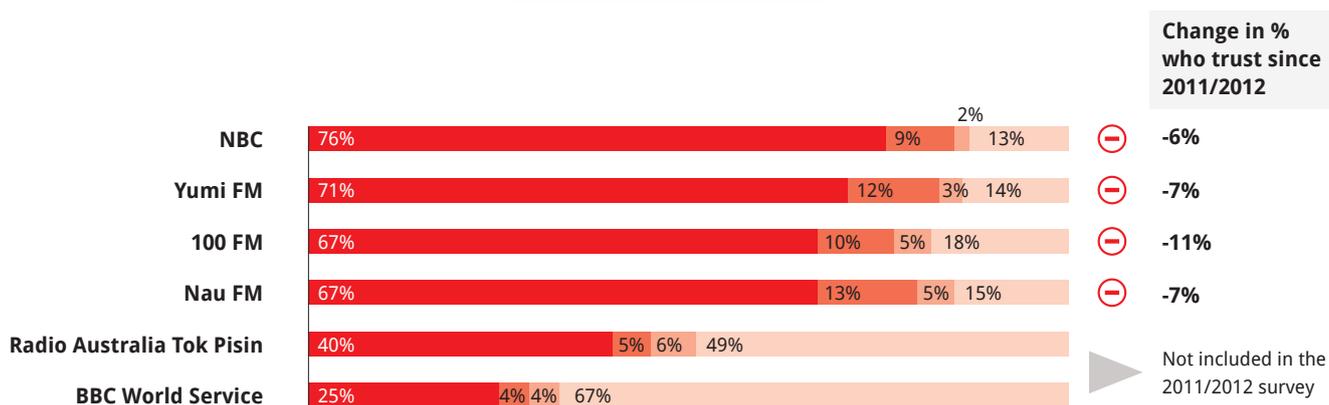


NBC   
  Yumi FM   
  Nau FM   
  FM 100

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

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

**Figure 11:**  
**Trust in radio stations**



■ Trustworthy   
 ■ Neither   
 ■ Untrustworthy   
 ■ DK/Refused

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

**REGULAR RADIO AUDIENCE WITH DIVERSE PROGRAMMING TASTES**

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

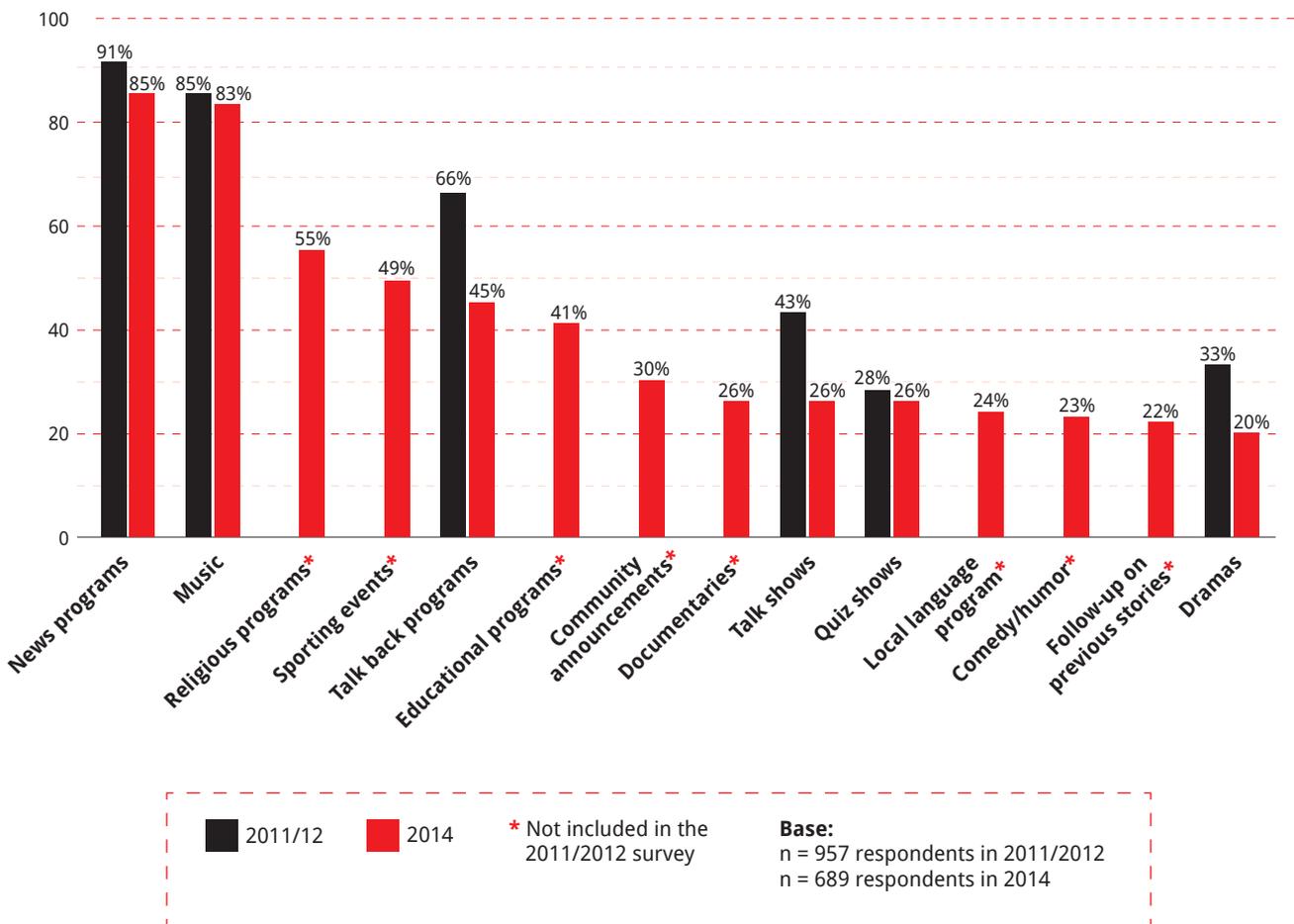
| Overall, news continues to rank as the preferred type of radio programming among regular radio listeners (Figure 12). However, interest in news from regular radio audiences has declined in the last three years, which also reflects in reduced listenership of news-oriented radio stations, such as NBC.

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

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

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

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



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

## 2.1.2.4. TV VIEWING HABITS

| Regular TV viewing across the country has not changed significantly since 2011/12. TV viewership in many areas remains limited by access issues, with over three quarters (78%) of those who do not watch TV<sup>30</sup> citing access as the main reason for not watching TV (77% in 2011/12<sup>31</sup>).

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

Morobe, male non-listener, 18-24

| That TV viewing continues to be strongly associated with household TV ownership is confirmed by the finding that among those who have a TV at home<sup>32</sup>, 75% watch it on a weekly basis, compared to only 21% who do not own a TV<sup>33</sup> and have to rely on communal viewing opportunities. While communal TV viewing has seen a decline over the past three years (Figure 13), it remains common particularly in the Highlands region. When compared with other provinces, a considerably greater share of regular viewers in the Highlands watch TV with others, either at their friend’s or relative’s house, in a communal village or town space, or at a trade store. For example, 85% of weekly TV viewers in Eastern Highlands and 63% in Western Highlands watch TV at a friend’s or family member’s house, compared to 56% or less in other provinces. Likewise, 48% in Eastern Highlands and 50% in Western Highlands watch TV in a public space, compared to only 27% or less in other provinces. 49% of regular viewers in Eastern Highlands and 51% in Western Highlands watch TV at a trade store, compared to 29% or less in other provinces.

| Other studies have also confirmed that public TV viewing is widespread in the Highlands region. For example, the 2012/2013 PACMAS study<sup>34</sup>, which explored the role of the haus piksa phenomenon, showed that these village cinemas are common in the Highlands and often attract those who do not have access to TV at home. TV viewing in these public spaces primarily covers movies, music videos and sports programming, rather than news coverage. Haus piksa attendance is generally higher over the weekend.

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30 n = 499 respondents who do not watch TV

31 n = 458 respondents who do not watch TV

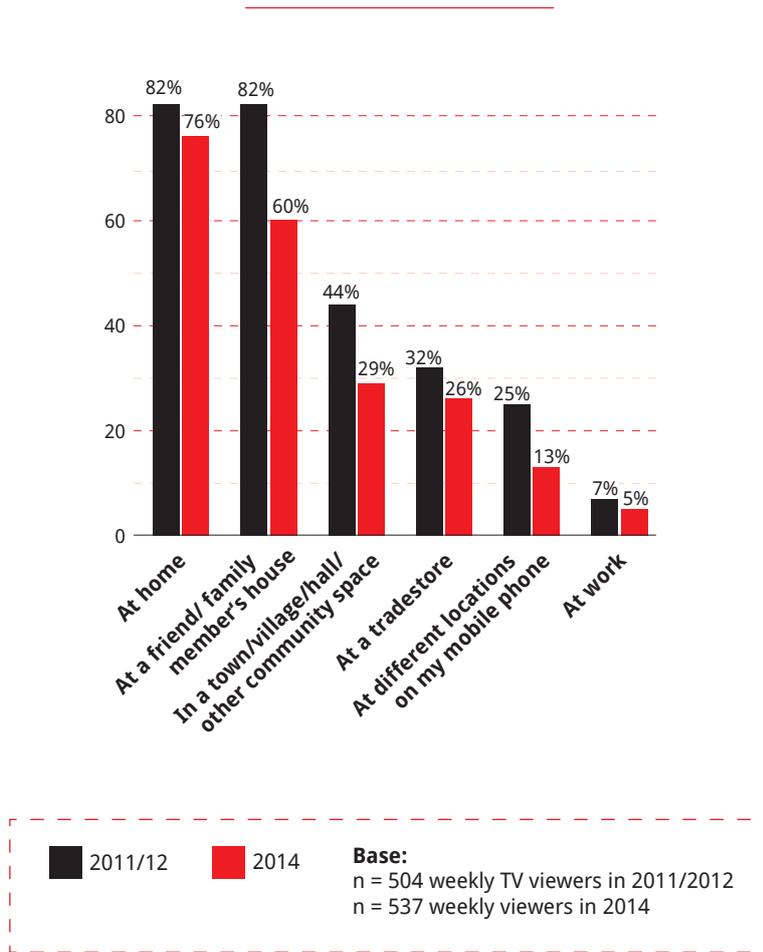
32 n = 499 respondents who do have a working TV in their household

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

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

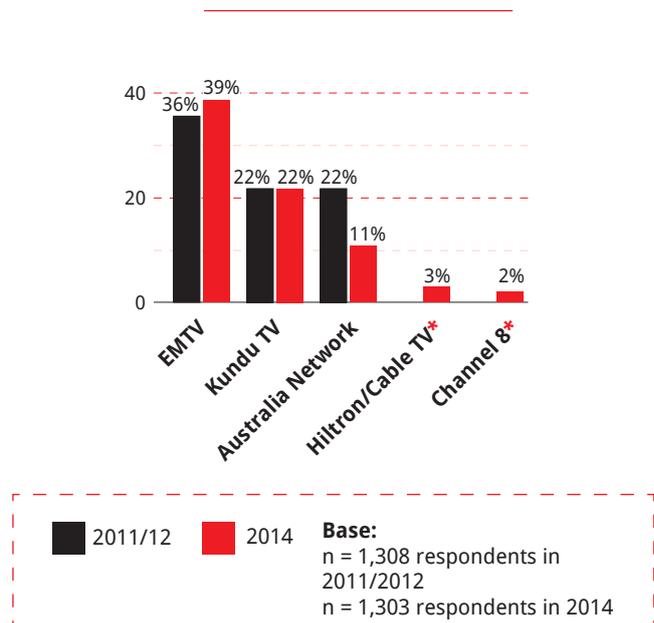
<http://www.pacmas.org/wp-content/uploads/2014/03/CD-Haus-Distribution-in-the-PNG-Highlands-Baseline-Report.pdf>

**Figure 13:  
Locations of TV viewing**



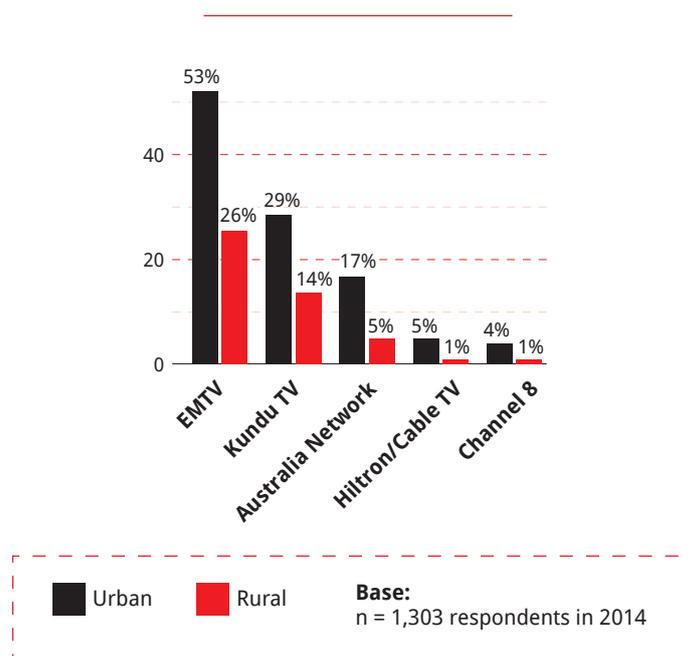
| EMTV and Kundu TV retained their audience<sup>35</sup> over the last three years (Figure 14), while Australia Network lost a significant share of their viewers, particularly in Eastern Highlands (its weekly reach dropped 36% compared to 2011/12) and Western Highlands (dropped 14%). As expected, all stations perform much better in urban centres where TV infrastructure is much better developed and more reliable than in rural areas (Figure 14A).

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



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

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



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

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

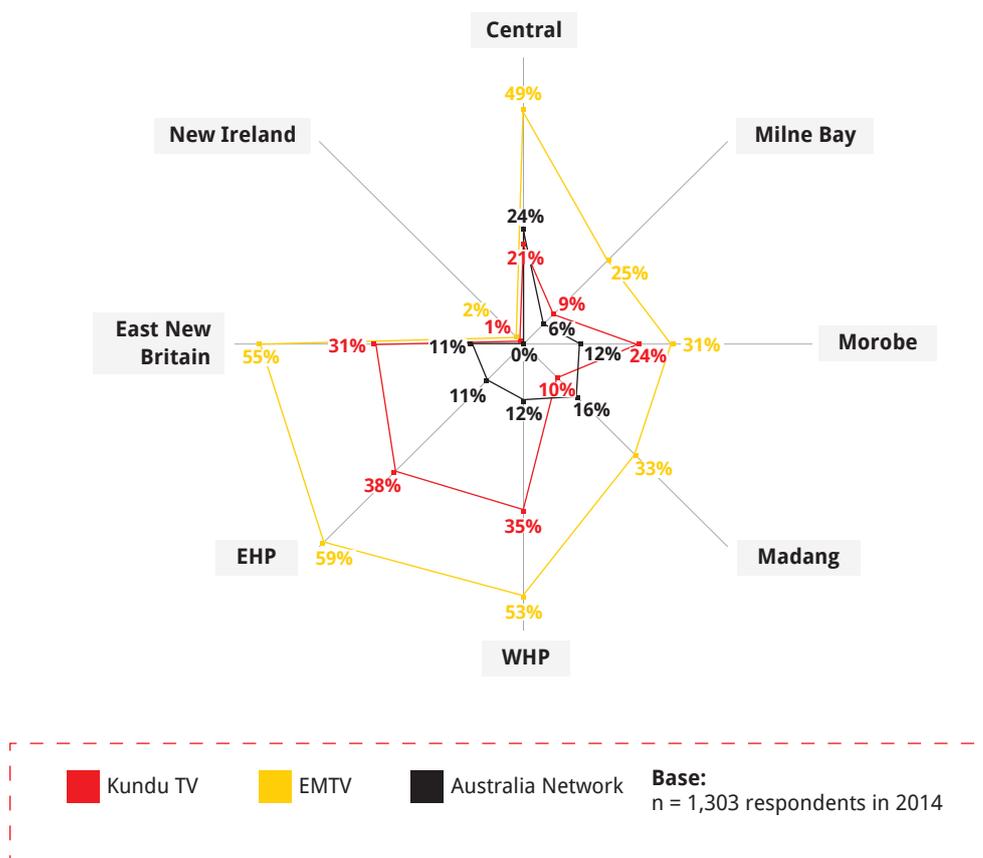
Mount Hagen, female regular listener, 18–24

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

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

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

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



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

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

### 2.1.2.5. NEWSPAPER READING PATTERNS

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

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

Mount Hagen, female non-regular listener, 25+

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

Morobe, female non-listener, 25+

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

Port Moresby, male regular listener, 25+

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

| Fewer readers now also read both newspapers (59% of weekly newspaper readers compared to 70% in 2011/12 study<sup>37</sup>) due to cost reasons, as the insights from the citizen discussion groups suggest. This trend mainly benefited the National: three quarters (78%<sup>38</sup>, 68% in 2011/12<sup>39</sup>) of those who get their news from only one of the two newspapers opt for the National.

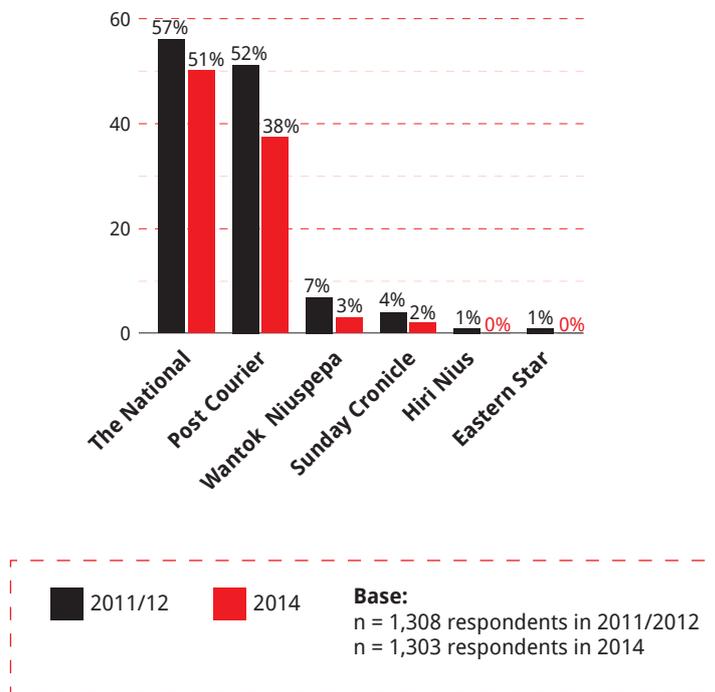
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37 n = 862 weekly newspaper readers in 2011/12, n = 730 weekly newspaper readers in 2014

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

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

**Figure 16:  
Weekly reach of newspapers**



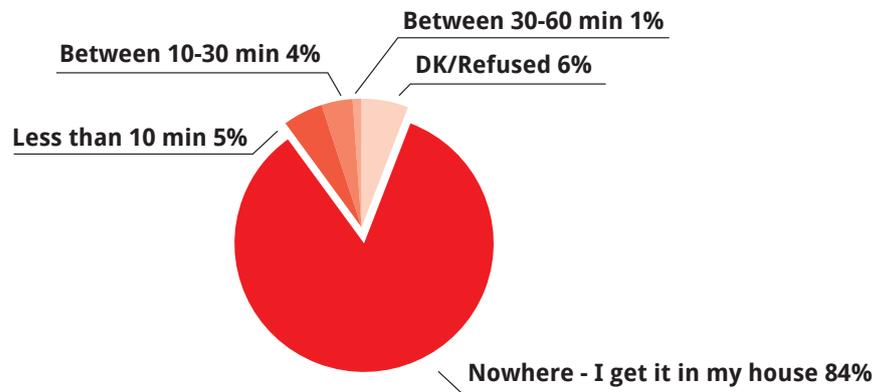
### 2.1.2.6. MOBILE USE HABITS

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

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

<sup>40</sup> n = 228 respondents who do not use a mobile phone

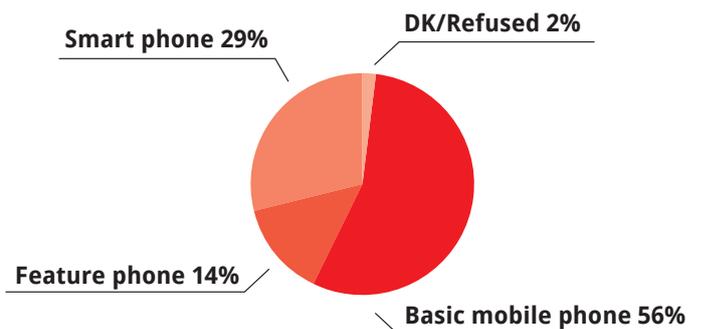
**Figure 17:**  
**How far do you need to travel to get a mobile signal?**



**Base:**  
 n = 843 mobile phone owners in 2014

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

**Figure 18:**  
**The type of mobile phone you own**



**Base:**  
 n = 843 mobile phone owners in 2014

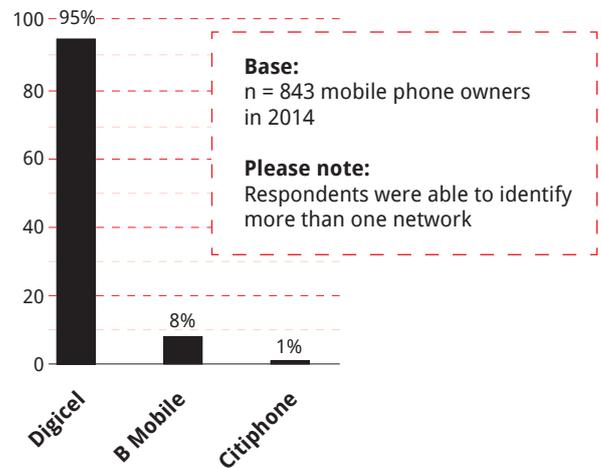
41 n = 254 15–24 year-olds who own a mobile phone

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

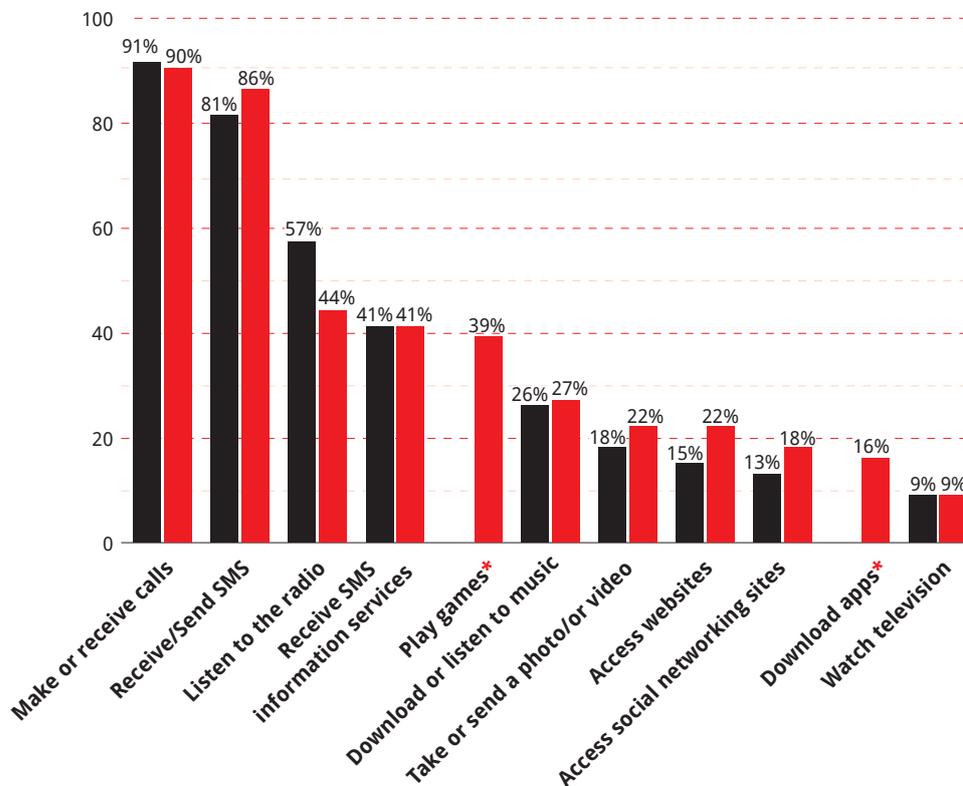
| Digicel continues to dominate the market, with more than nine in ten (95%) of all mobile phone owners using their network (Figure 19), while B Mobile and Citiphone capture only a minor share. A small proportion of mobile phone users (4%) also say they use more than one network.

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

**Figure 19:**  
**Mobile networks used by mobile owners**



**Figure 20:**  
**Weekly use of mobile phone for different activities**



2011/12    
  2014    
 \* Not included in the 2011/2012 survey

**Base:**  
n = 1,039 weekly mobile phone users in 2011/2012  
n = 929 weekly mobile phone users in 2014

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

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

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

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

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

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

### **2.1.2.7. INTERNET USE HABITS**

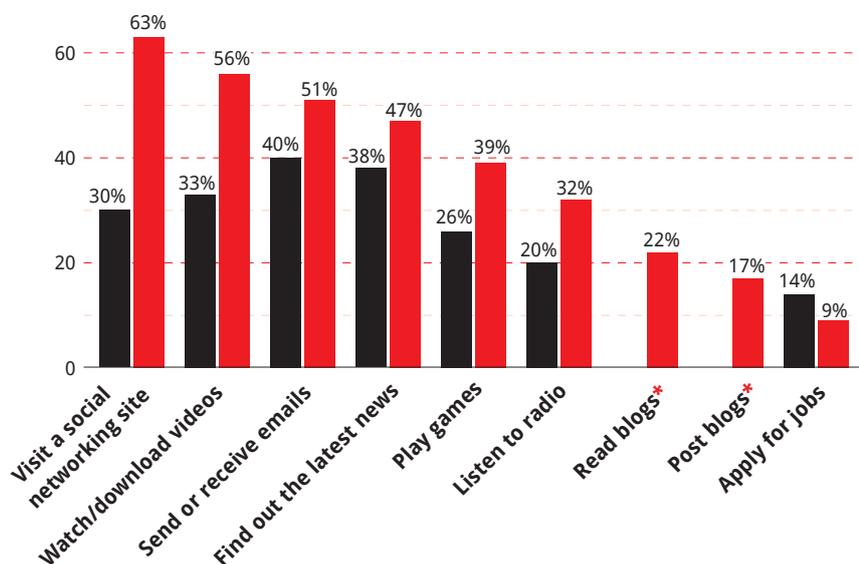
| Rapidly growing popularity of social media networking sites and a significant increase in watching and downloading online videos were the two key developments that have changed in the PNG internet space since 2011/12 (see Figure 21). Alongside Google, the world’s leading search engine, Facebook is now the most popular page among regular internet users<sup>43</sup> (Figure 22). Those who use it on a regular basis<sup>44</sup> are mostly male (60%), live in urban areas (74%), have at least secondary education (80%) and are between 15–24 years old (56%).

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

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

**Figure 21:  
Weekly use of internet for different activities**

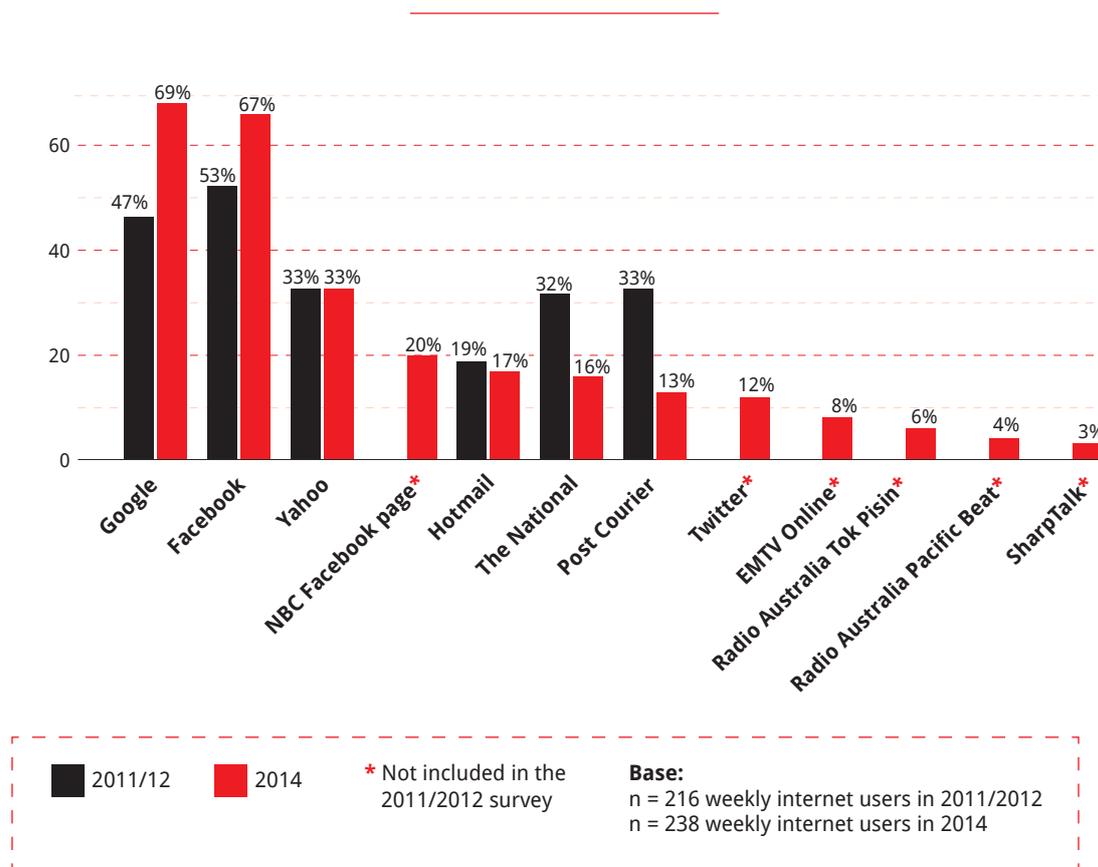


2011/12    
  2014    
 \* Not included in the 2011/2012 survey    
**Base:**  
 n = 216 weekly internet users in 2011/2012  
 n = 238 weekly internet users in 2014

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

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

**Figure 22:  
Weekly reach of websites**



### 2.1.3. PERCEPTIONS OF FREEDOM OF EXPRESSION

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

| These observations did not seem to reflect the public’s perception of media freedom and independence, which remains broadly unchanged since the 2011/12 study<sup>47</sup> (Figure 23). Two thirds of all who participated in the survey thus continue to believe that the PNG media are independent and able to report on any issue.

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

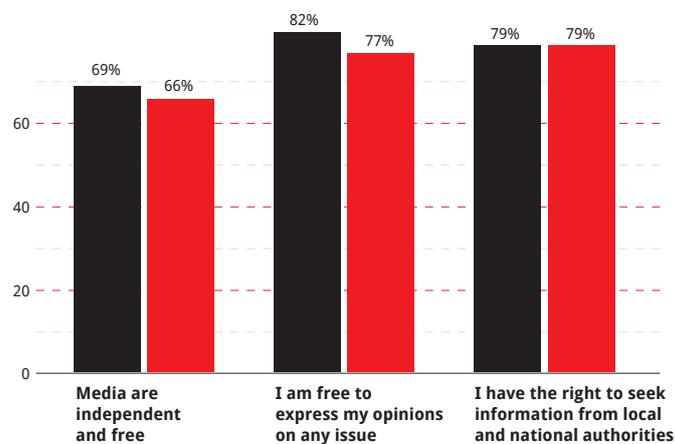
46 Ibid.

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

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

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

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



■ 2011/12 ■ 2014

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

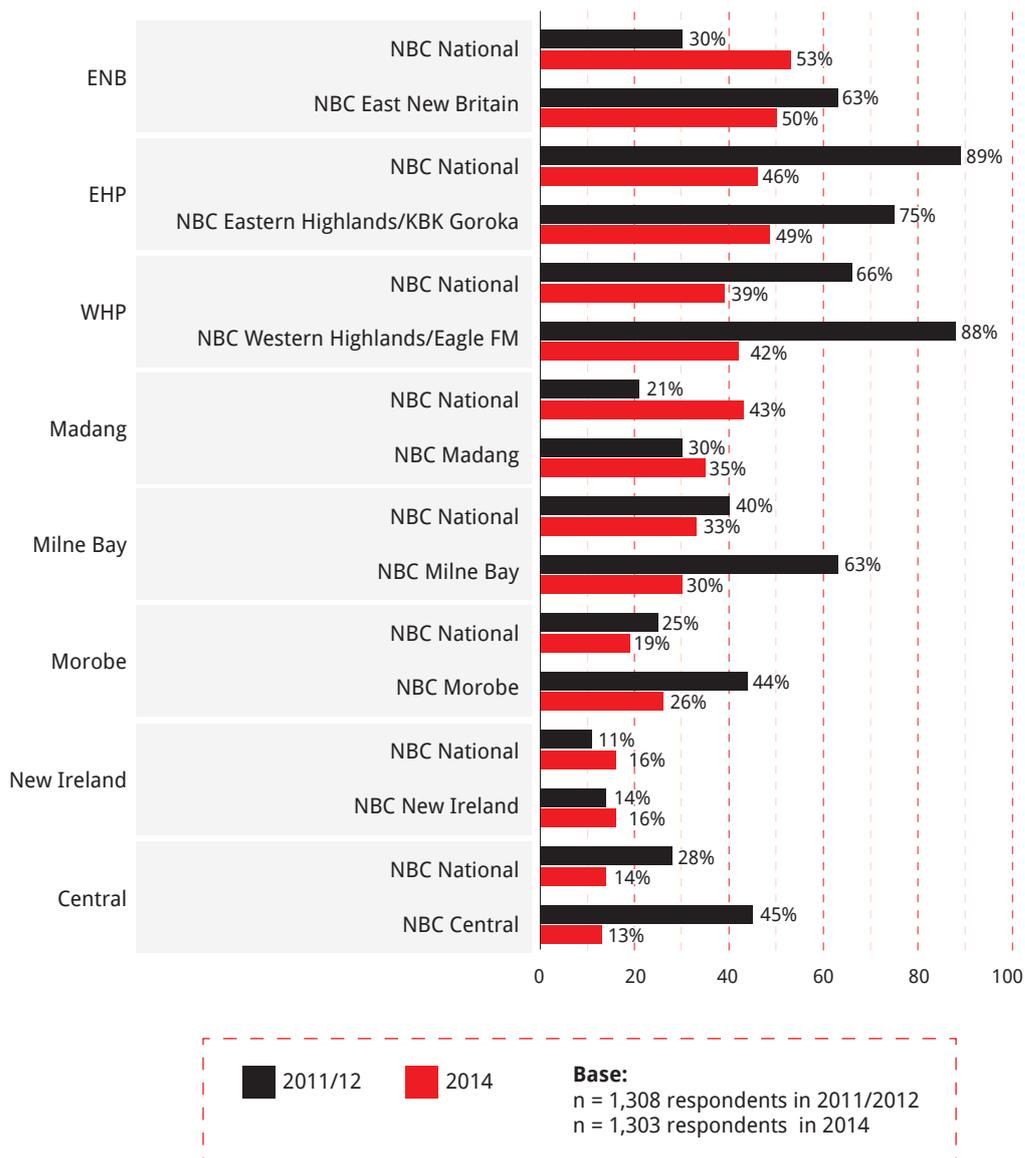
## 2.2. NBC Platforms, Programs, and Audience

### 2.2.1. NBC RADIO

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

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

**Figure 24:**  
**Weekly reach of NBC radio stations**



| While the **general fall in radio listenership** can be considered one of the causes for the fall in NBC's weekly audience, it is important to note that not all radio stations were affected by this trend in the same way. In Milne Bay, both Yumi FM and Nau FM managed to keep their weekly listenership on the same level as in 2011/12 (at 18% and 14%, respectively<sup>48</sup>), while NBC's weekly audience in the province fell from 66% in 2011/12 to 43% in 2014. Similarly, in Morobe, Yumi FM saw no change in their weekly listenership, while all other top stations have lost significant ground since 2011/12 (NBC's weekly audience fell from 49% in 2011/12<sup>49</sup> to 32% in 2014<sup>50</sup>). Two possible reasons for these differences may be a worsening NBC signal, (discussed in more detail below) and more popular music and non-news programming offered by competitor stations.

| NBC remains the preferred provider of news with 43% of regular listeners<sup>51</sup> citing it as their preferred source, compared to 25% for Yumi FM and 12% for Nau FM. Insights from the citizen discussion groups, however, show that those who listen to the radio for music and lighter content generally prefer NBC's main competitors. As such, NBC risks losing more listeners to other stations in the near future, particularly among the younger generation, unless its music selection and lighter content improves considerably.

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

| At present, the vast majority of NBC's weekly audience (94%<sup>52</sup>) listens to radio on FM frequency, 3% listen on medium wave and 3% on short wave. However, listeners who participated in the citizen discussion groups in West New Britain<sup>53</sup> and in Morobe all complained about poor NBC radio signals. They reported that in West New Britain the signal tends to be weak and sporadic, with one participant commenting that NBC has the worst reception among all radio stations available in the area. In Morobe, listeners reported that they are unable to listen to NBC at all, due to lack of signal. As such, several participants listen to NBC Morobe (as well as other stations) only when they travel to Lae, where the signal tends to be somewhat stronger. Others simply stopped listening to the radio and instead now turn to print media to stay up to date with news and current affairs.

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

West New Britain, female regular listener, 25+

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48 n = 156 respondents in Milne Bay

49 n = 161 respondents in Morobe

50 n = 154 respondents in Morobe

51 n = 689 weekly radio listeners

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

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

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

Morobe, female non-listener, 25+

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

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

Port Moresby, female regular listener, 18–24

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

West New Britain, female regular listener, 25+

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

Morobe, male non-listener, 18–24

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

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

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

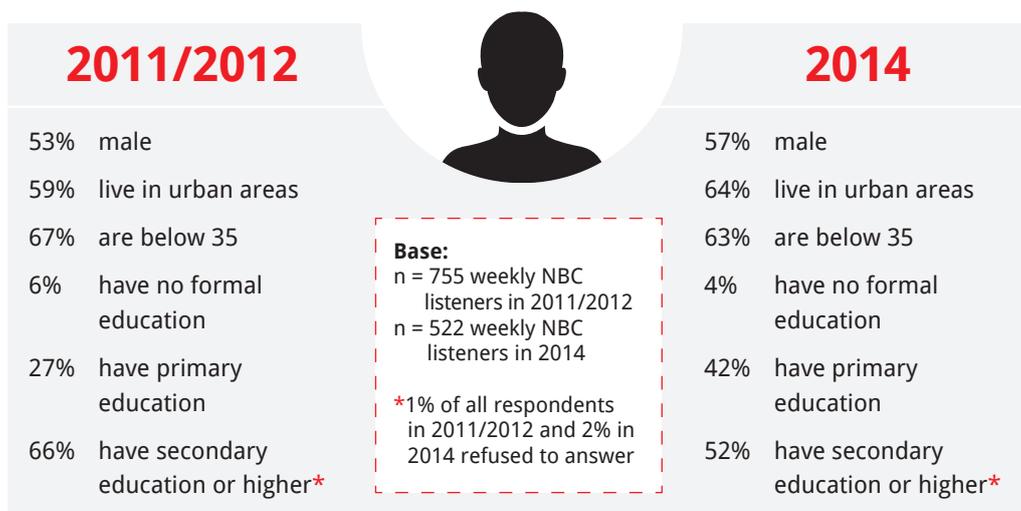
| Lastly, NBC’s leadership in the PNG radio market is being threatened by **growing competition** from new radio stations that tailor their offering to a specific target audience. Lalokau FM in Central, for example, managed to attract a significant radio audience since its establishment in 2013. In the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

### NBC AUDIENCE REMAINS MAINLY URBAN AND BETTER EDUCATED

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

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

### Profile of NBC weekly listeners



55 n = 177 respondents in the Central

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

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

58 n = 182 respondents in Central

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

## NEWS REMAINS NBC'S KEY STRENGTH

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

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

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

Port Moresby, female regular listener, 18–24

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

Port Moresby, male regular listener, 25+

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

Mount Hagen, female regular listener, 25+

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

Mount Hagen, male regular listener, 18–24

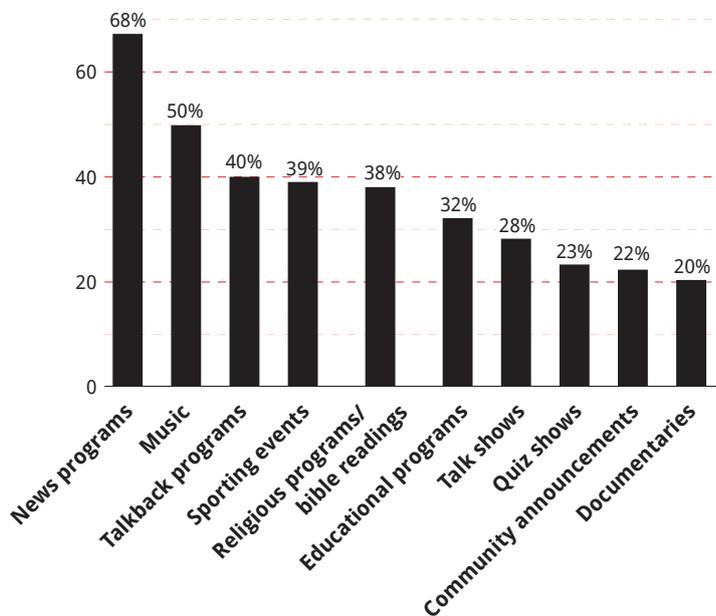
| However, the results of the citizen discussion groups also suggest that these favourable sentiments are stronger among older listeners and those with limited access to other media sources. While listeners who live in more diverse media environments (e.g. in Port Moresby) also value NBC for their quality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

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

Port Moresby, female regular listener, 25+

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

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



**Base:**  
n = 522 NBC weekly listeners in 2014

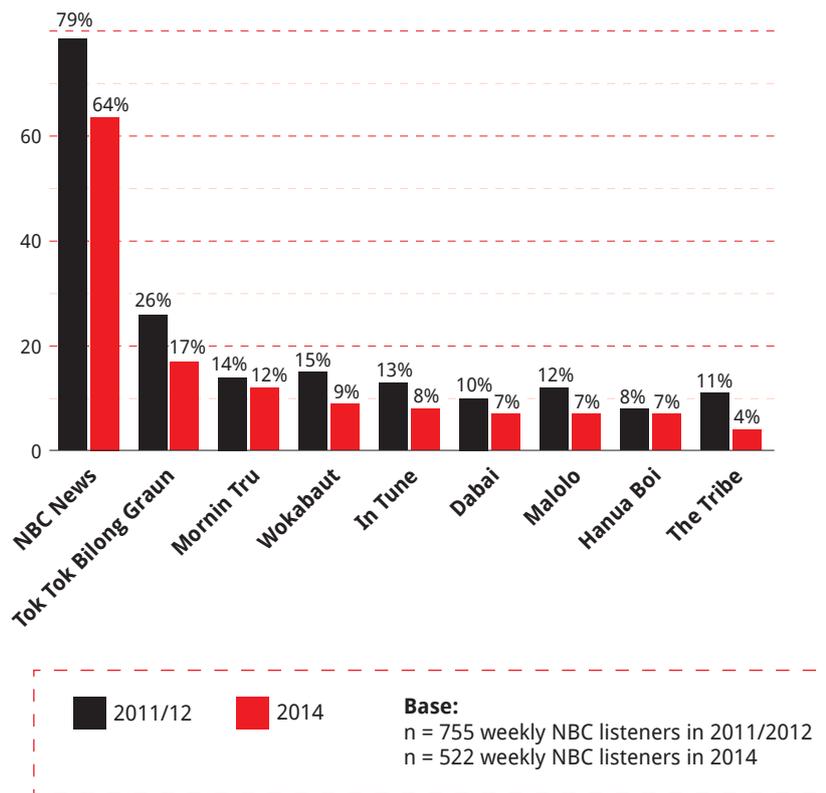
60 n = 358 respondents who listen to NBC News on a weekly basis

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

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

| Talkback programs that allow listeners to more actively engage with the content and provide their views on different subjects remains high on the list of popular programming. Participants in the citizen discussion groups expressed their appreciation for this type of program, particularly for NBC’s talkback shows on social issues, such as domestic violence, environment and family planning, which they found educational. This high interest also reflects in a substantial share of listeners who participated in such shows in the past, with about a third (30%) of those who listened to talkback<sup>62</sup> saying they have called into a show before. Younger listeners are the most likely to participate in such shows (42% of those who had called in before<sup>63</sup> were 15–24 and 30% were 25–34), as are men (61% of callers were male) and residents of urban areas (63%).

**Figure 26:**  
**Weekly audience of individual NBC programs**



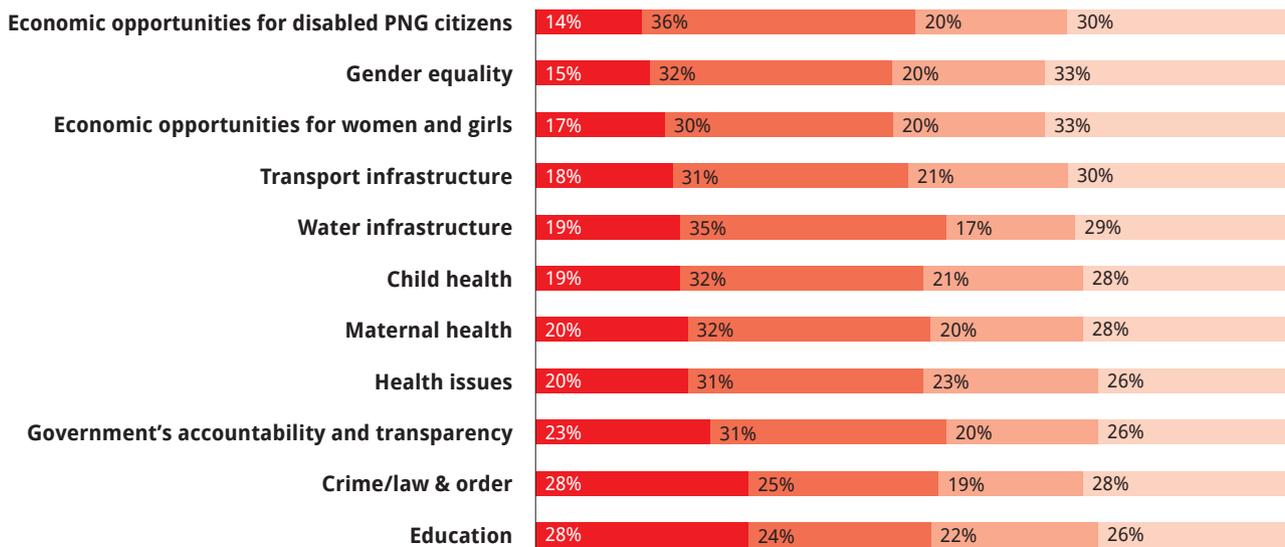
62 n = 303 NBC regular listeners who have listened to an NBC talkback program before

63 n = 106

**VARYING INFORMATION NEEDS OF NBC AUDIENCE ACROSS DIFFERENT PROVINCES**

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

**Figure 27:  
Amount of information NBC provides on individual issues**



Too much
  Too little
  The right amount
  DK/Ref

**Base:**  
n = 522 NBC weekly listeners in 2014

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

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

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

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

| Lastly, it is also important to note that women's and men's perspectives on how much airtime NBC should be dedicating to these issues differ. Women believe that NBC should increase its focus on gender equality (41%<sup>64</sup> compared to 29% of men<sup>65</sup>) and accountability and transparency of PNG government (39% of women, 31% of men), while men tend to feel that NBC presently dedicates too much time to both of these issues.

### **MUSIC AND ENTERTAINMENT CONTENT SHOWING MOST ROOM FOR IMPROVEMENT**

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

64 n = 281 respondents

65 n = 338 respondents

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

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

Port Moresby, male regular listener, 18–24

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

Port Moresby, male regular listener, 25+

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

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

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

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

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

Port Moresby, female regular listener, 18–24

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

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

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

Mount Hagen, female regular listener, 18–24

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

West New Britain, female regular listener, 25+

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

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

Port Moresby, male regular listener, 25+

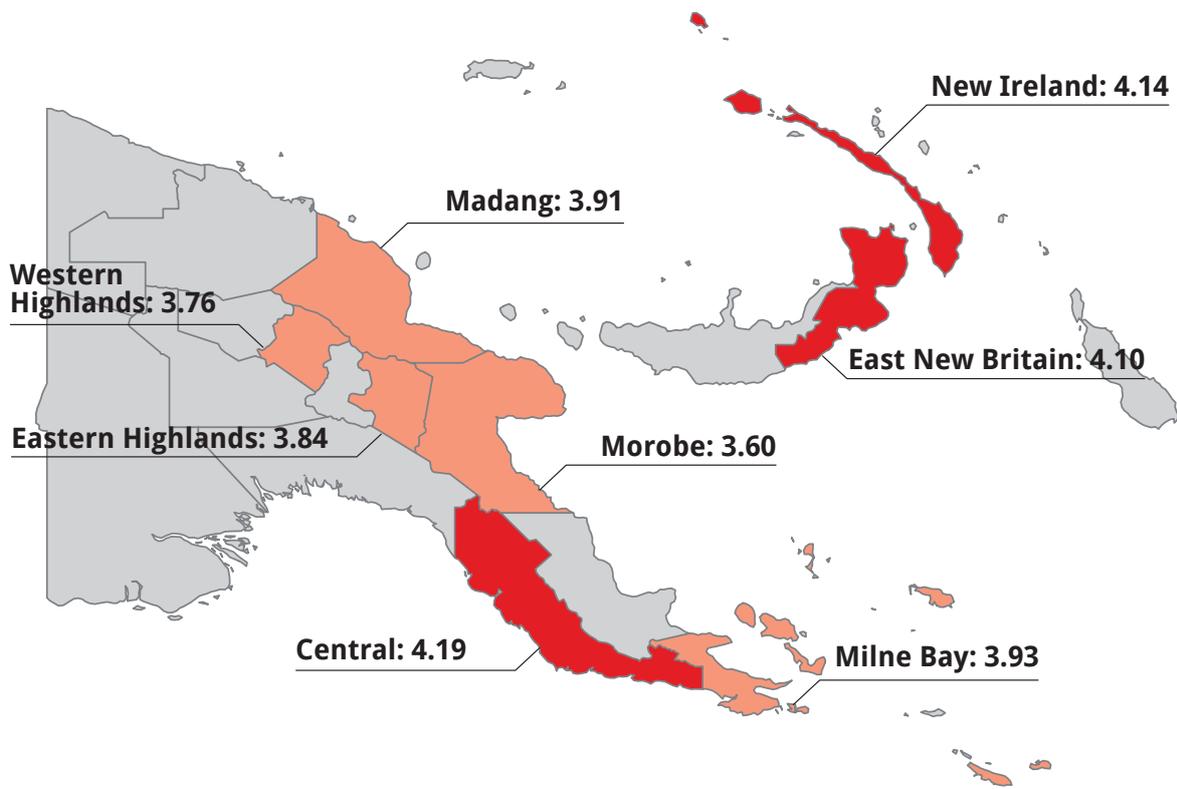
| Lastly, some participants of the citizen discussion groups also called for more interactive programming. Several commented that NBC puts too much focus on one-way communication with the audience (long segments of presenter monologues and dialogues with the guests) and lacks programming that engages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

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

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

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

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



**NBC Brand Percetion Index:**

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

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

**Index Score: 1-5**

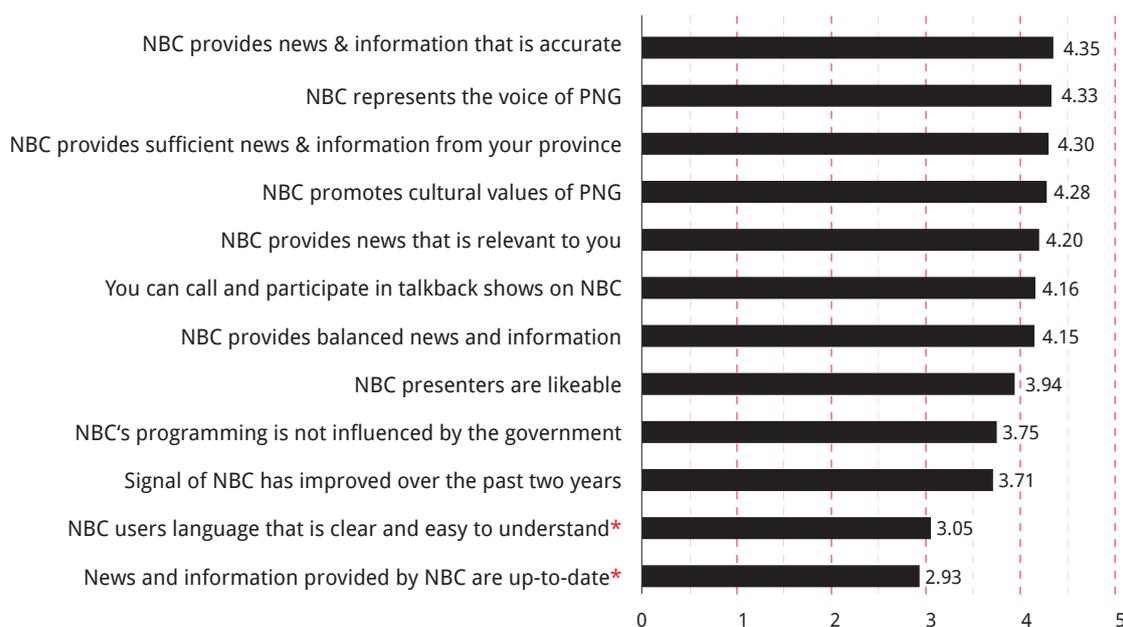
- 1.00-3.00 Negative brand perception
- 3.01-4.00 Moderately positive brand perception
- 4.01-5.00 Highly positive brand perception

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

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

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

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



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

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

## 2.2.2. TRIBE FM

| Tribe FM was set up in its current 3-hour format in 2008 to provide informative, entertaining and engaging programming that focuses on issues relevant to young citizens of Papua New Guinea. However, at present Tribe FM has limited recognition and listenership among its target audience; only 5% of all respondents<sup>66</sup> and only 6% of all 15–24 year-olds<sup>67</sup> listened to the program in the past year. The majority of these listeners<sup>68</sup> live in urban centres (62%), are male (70%) and reside in the Momase (39%) or Highlands region (34%). Interestingly, Tribe FM has attracted some listeners outside of its target group, with 35% of all annual listeners over the age of 30.

66 n = 1,303

67 n = 415

68 n = 61

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

Port Moresby, male regular listener, 18–24

| However, it is also important to note that the gap between awareness of Tribe FM and the program’s listenership is relatively small. Looking only at those who have heard of Tribe FM before (7% of all respondents), the vast majority, 75% of them,<sup>69</sup> also went on to listen to the program (at least once). For 15–24 year-olds this figure is even higher with 82% of those who are aware of Tribe FM<sup>70</sup> saying they have listened to it before. This suggests that the concept of Tribe FM is highly appealing to its target audience and that the challenge in increasing its listenership may lie primarily in improving the marketing of the program.

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

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

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

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

Morobe, male non-listener, 18–24

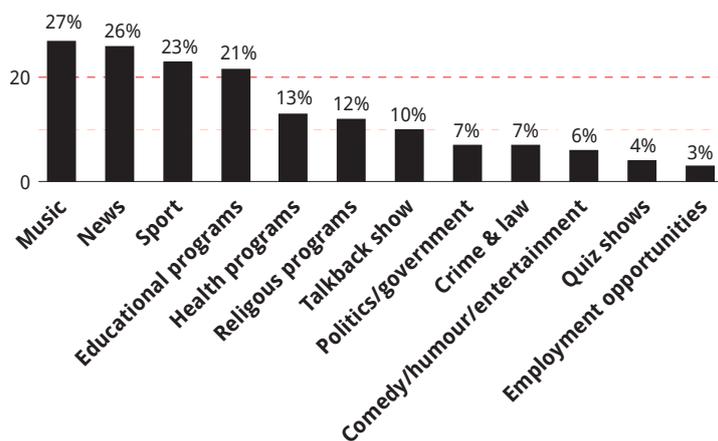
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69 n = 89 respondents who have heard of Tribe FM before

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

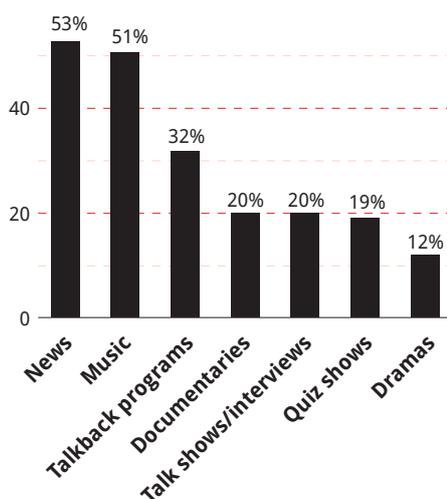
Young people's interest in news is confirmed by their views on which types of programming should be broadcast more on the radio, with news topping the list alongside music and sport (Figure 31).

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



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

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



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

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

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

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

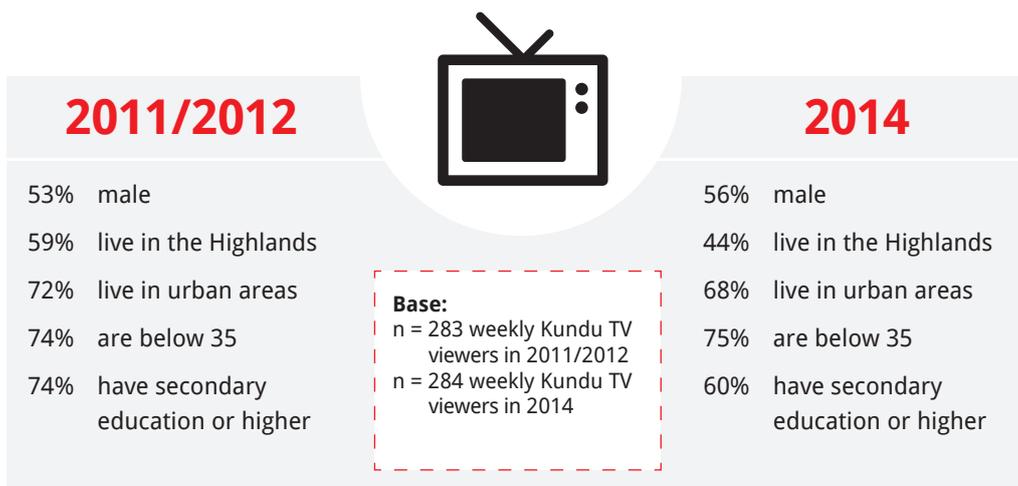
| Furthermore, the insights from the study also suggest that the timing of these different types of programming may also need to be different to attract the optimal audience among the younger generation. As the results of the survey show, youth (both 15–19 year-olds as well as 20–29 year-olds) prefers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

### 2.2.3. KUNDU TV

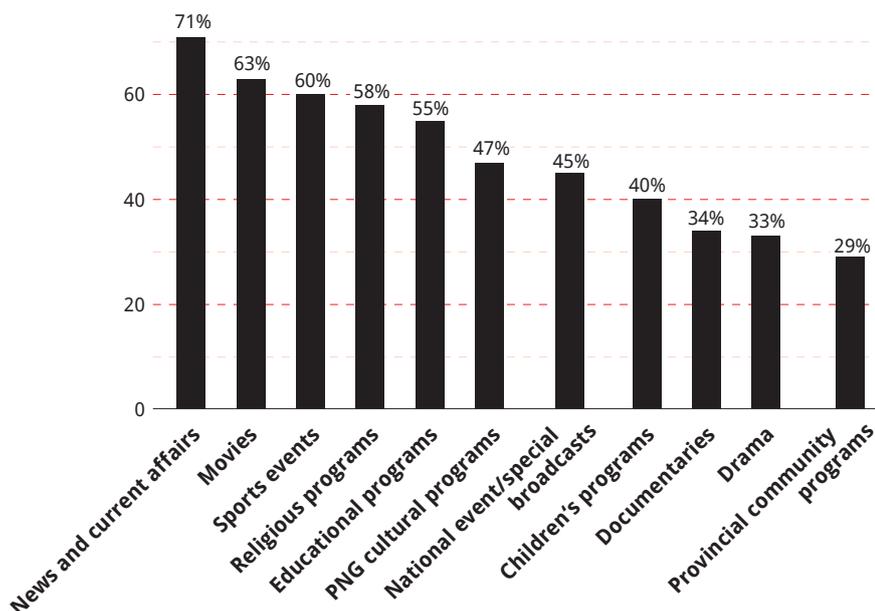
| Kundu TV’s weekly viewership saw some diversification since the 2011/12 study, however, its audience remains predominantly urban, young, better educated and concentrated in the Highlands region. This is largely a consequence of the limited TV infrastructure in rural areas, varying TV signal strength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

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

## Profile of Kundu TV weekly viewers



**Figure 32:**  
Kundu TV programs liked by its weekly viewers



**Base:**  
n = 283 weekly Kundu TV viewers in 2014

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

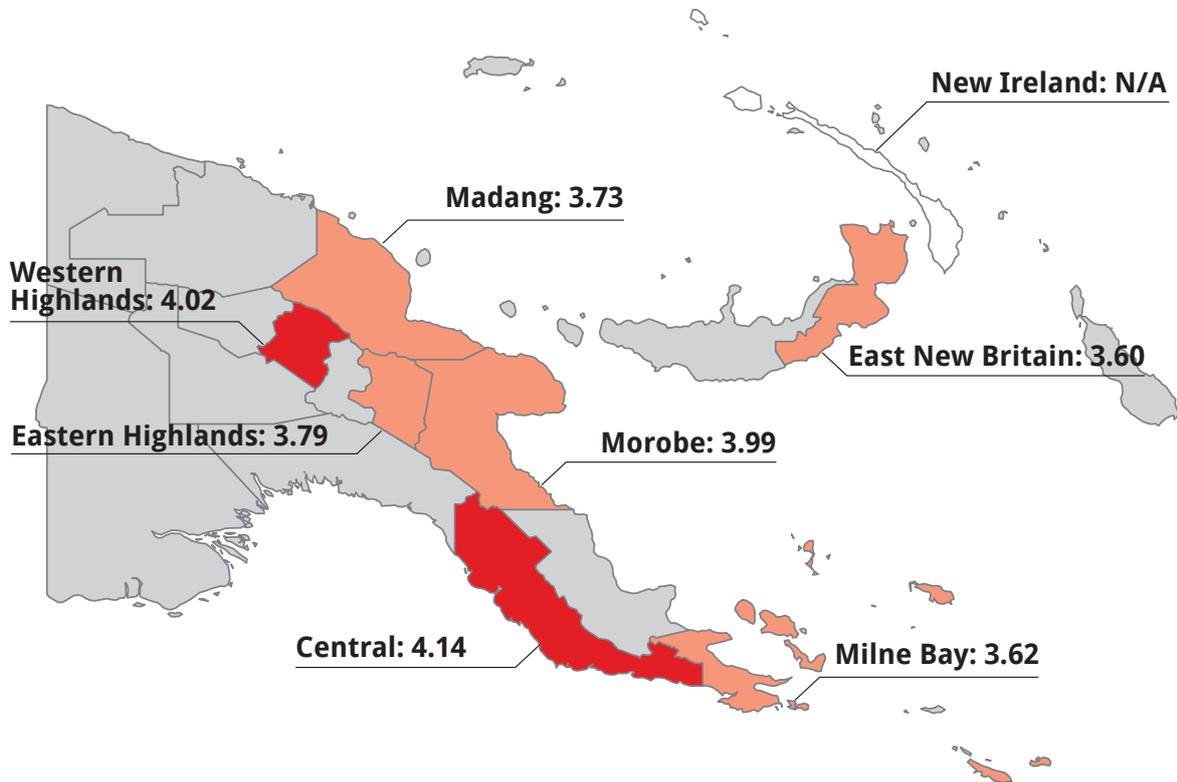
<sup>72</sup> Kundu TV typically mixes English and Tok Pisin in its programming.

**VIEWERS IN CENTRAL HOLD THE MOST POSITIVE VIEW OF KUNDU TV**

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

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

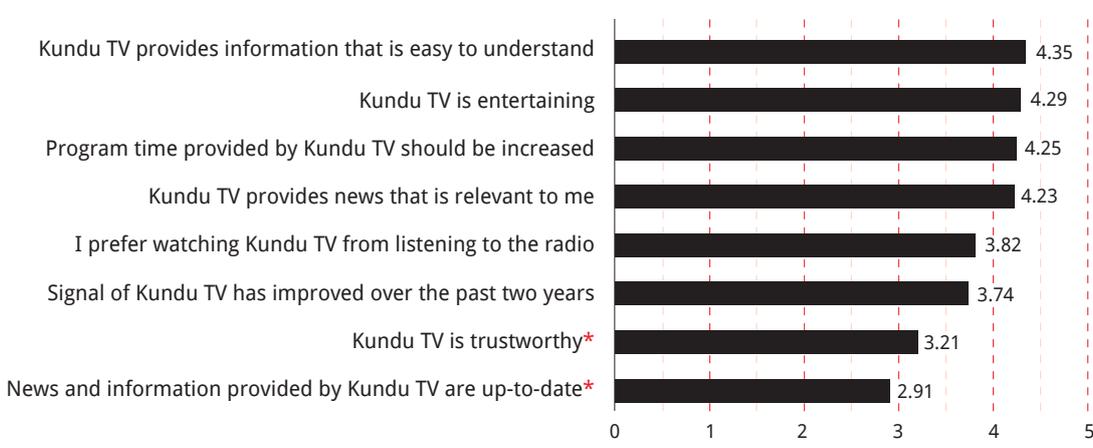
**Figure 33:  
Kundu TV Brand Perception Index by province**



<b>Kundu TV Brand Perception Index:</b>	<b>Index Score: 1-5</b>	
	1.00-3.00	Negative brand perception
	3.01-4.00	Moderately positive brand perception
	4.01-5.00	Highly positive brand perception
The Kundu TV Brand Perception Index has a range of 1–5 indicating the appeal of the Kundu TV brand. The higher the score, the more positive is the attitude towards a particular aspect of the Kundu TV brand or the brand overall.		

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

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



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

**Base:**  
n = 283 viewers of Kundu TV

## 2.2.4. YUMI GO WER?

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

| The latest study shows that 11% of all survey respondents<sup>74</sup> recognise the show, and only 8%<sup>75</sup> have ever watched or listened to the show. Among weekly radio listeners<sup>76</sup> awareness and reach<sup>77</sup> of Yumi Go Wer? were recorded at 14% and 9%, respectively, and among weekly TV viewers<sup>78</sup> at 15% and 10%, respectively.

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

Mount Hagen, male regular listener, 25+

| The majority of those who have listened or watched the program<sup>79</sup> before accessed it either on Kundu TV (34%), NBC Western Highlands (27%) or on NBC Eastern Highlands (14%). The majority (62%<sup>80</sup>) accessed the program only on the radio, about a quarter (26%) both watched it on TV and listened to it on radio and 12% only watched it on TV. The three main topics discussed on these episodes were government transparency, education and health (Figure 35). Less than one in ten (6%) of all who have seen or heard the show before also visited its Facebook page.

| Despite the current low audience attention, insights from citizen discussion groups and the survey illustrate that the show is highly valued by PNG citizens. More than three quarters (78%) of those who have seen or heard the show before believe that the program is relevant to them. That the interest in Yumi Go Wer? is high, is also suggested by the fact that the majority of those who have heard of the program<sup>81</sup> (70%) also listened to it or watched it. Similar to Tribe FM, the key in increasing its audience may lie in increasing its overall awareness by strengthening the marketing component of the program.

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

74 n = 1,303

75 n = 1,303

76 n = 689

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

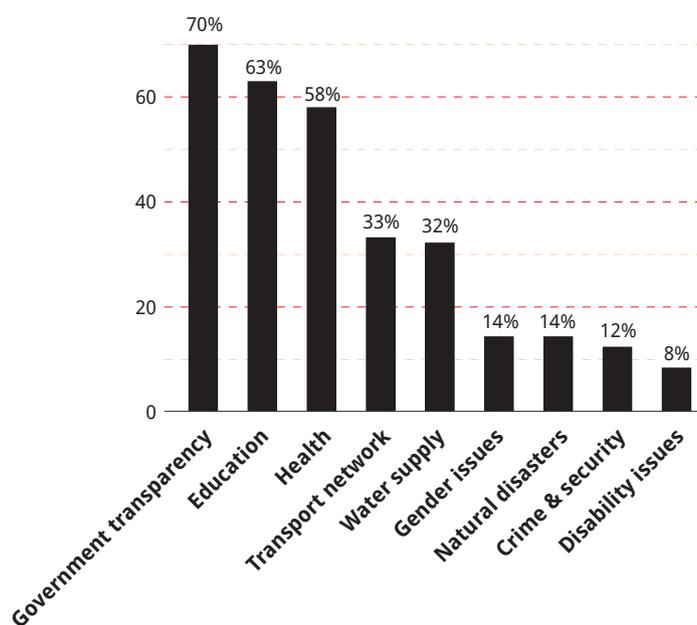
78 n = 537

79 n = 101

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

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

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



**Base:**

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

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

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

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

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

## 2.3. Disaster Broadcasting: Information Needs and Gaps

### 2.3.1. OVERALL DISASTER PREPAREDNESS OF PNG CITIZENS

| The Asia-Pacific region is the world's most disaster-prone region, with the highest number of people killed or otherwise affected by natural disasters between 2002 and 2011.<sup>82</sup> According to the Centre for Research on the Epidemiology of Disasters, between 2005 and 2014 PNG experienced 20 major disasters, which overall affected more than half a million people.<sup>83</sup>

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

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

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

The analysis revealed four key insights:

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

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

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

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

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

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

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

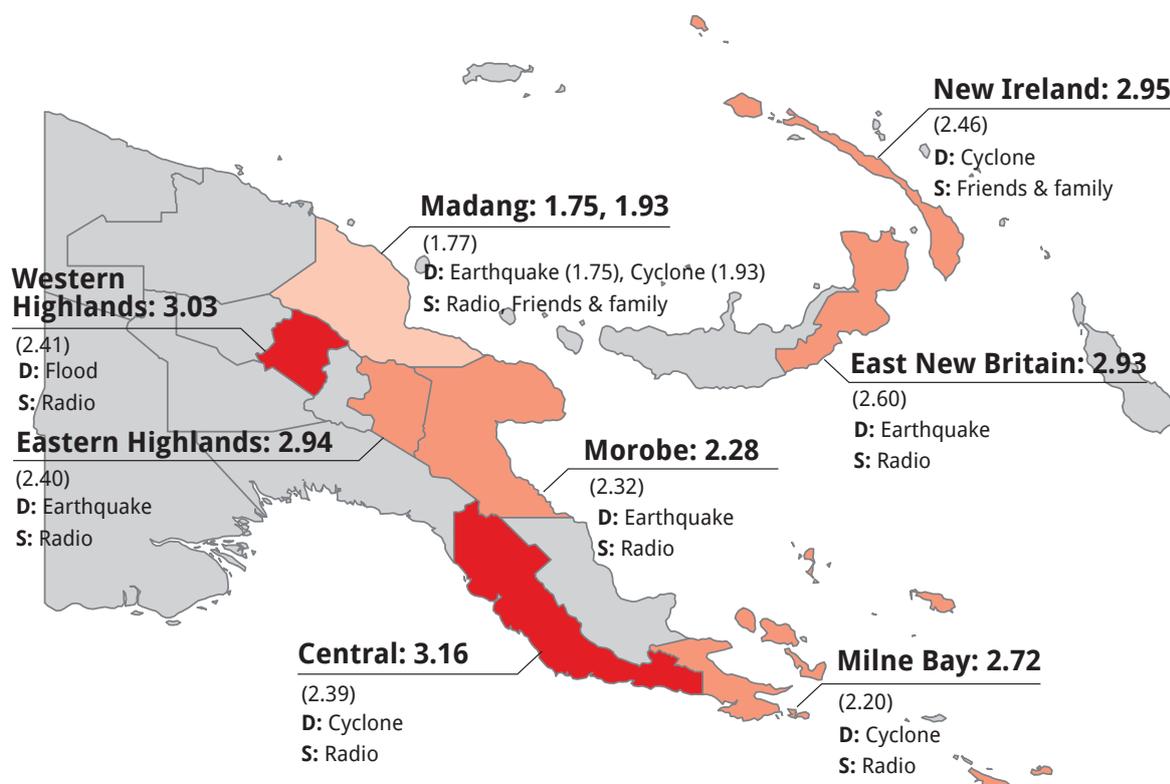
- Third, although radio plays a crucial role in providing PNG citizens with information on natural disasters in many provinces, **the overall level of media use is not strongly associated with how well prepared citizens feel to cope with natural disasters**. This suggests that while radio may be important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

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

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

**Figure 36:  
Natural Disaster Readiness Index**



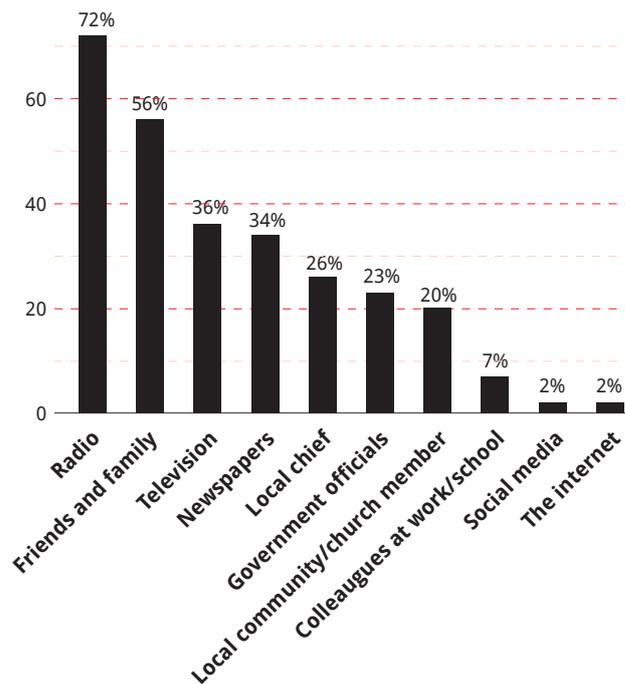
<p><b>Bold Index Score:</b></p> <p>Disaster Readiness Index for the disaster most common in a particular province</p> <p><b>D:</b> The disaster experienced by the largest share of respondents in a particular province</p>	<p><b>Index Score in brackets:</b></p> <p>Overall Disaster Readiness Index for all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

## 2.3.2. SOURCES OF INFORMATION ON NATURAL DISASTERS

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

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

**Figure 37:**  
**Most used sources for information on natural disasters**



**Base:**  
n = 1,303 respondents in 2014

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

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

Port Moresby, male regular listener, 25+

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

Morobe, male non-listener, 18–24

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

Mount Hagen, male regular listener, 25+

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

Morobe, male non-listener, 18–24

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

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

Mount Hagen, male regular listener, 18–24

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

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

### 2.3.3. KEY INFORMATION NEEDS DURING NATURAL DISASTERS

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

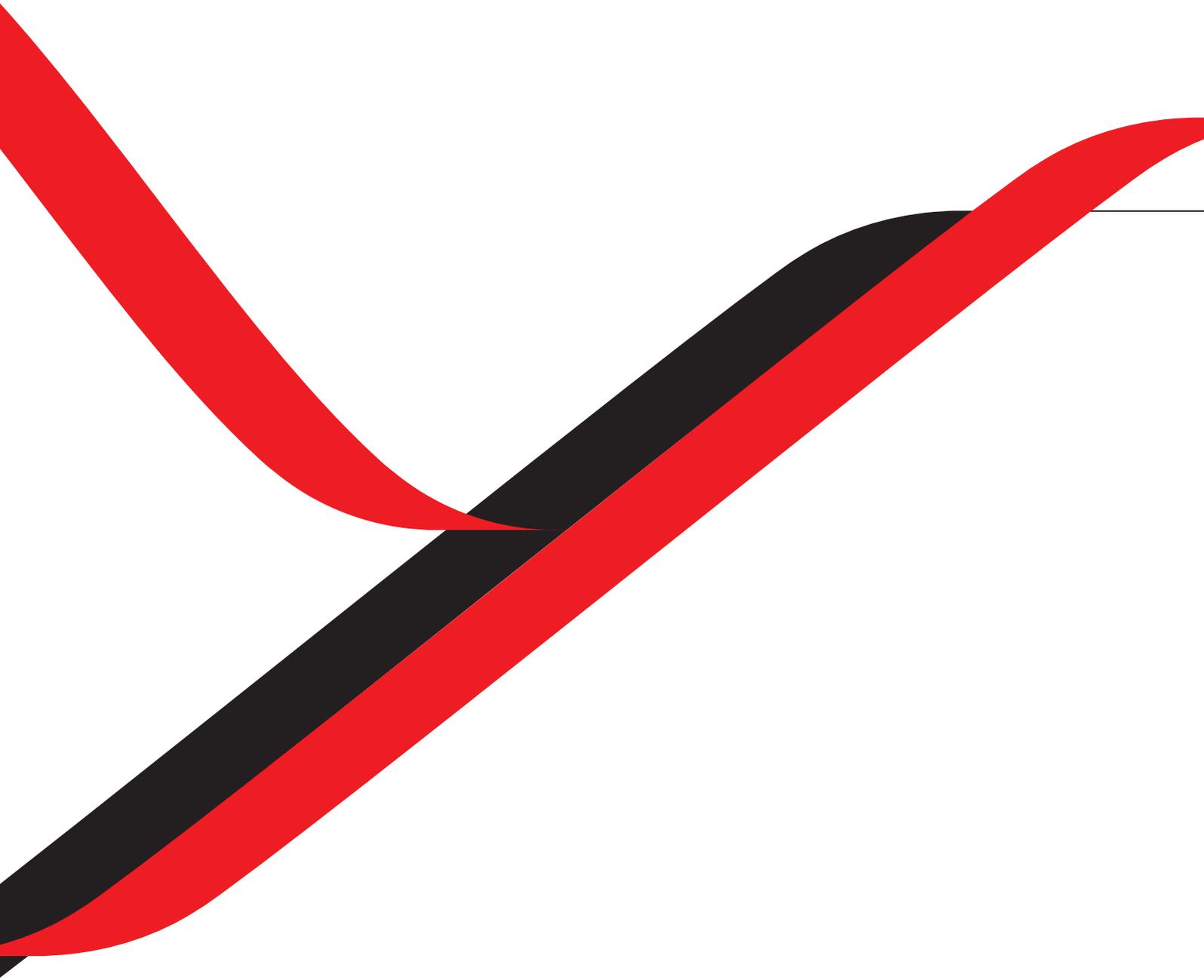
**Figure 38:**  
**Importance of specific information during disasters**



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

**Base:**  
n = 1,303 respondents in 2014

### 3. CONSIDERATIONS



## **IMPROVING RADIO AND TV REACH AND AUDIENCE ENGAGEMENT**

### **PRIORITISE IMPROVING RADIO SIGNAL ACROSS THE COUNTRY**

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

### **MAINTAIN HIGH QUALITY NEWS COVERAGE, BUT IMPROVE TIMELINESS OF NEWS**

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

### **IMPROVE INTERACTIVITY OF RADIO PROGRAMS**

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

### **MODERNISE RADIO PRESENTATION STYLE**

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

### **INVEST IN TV INFRASTRUCTURE AND PROGRAMMING**

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

## **DEVELOPING CONTENT FOR YOUTH**

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

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

### **DIVERSIFY RADIO CONTENT**

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

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

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

### **ENSURE THAT MEDIA CONTENT IS OPTIMISED FOR MOBILE INTERNET**

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

## **EXPANDING CONSUMPTION OF YUMI GO WER?**

### **IMPROVE PROMOTION OF YUMI GO WER?**

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

## **STRENGTHENING CITIZENS' DISASTER PREPAREDNESS**

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

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

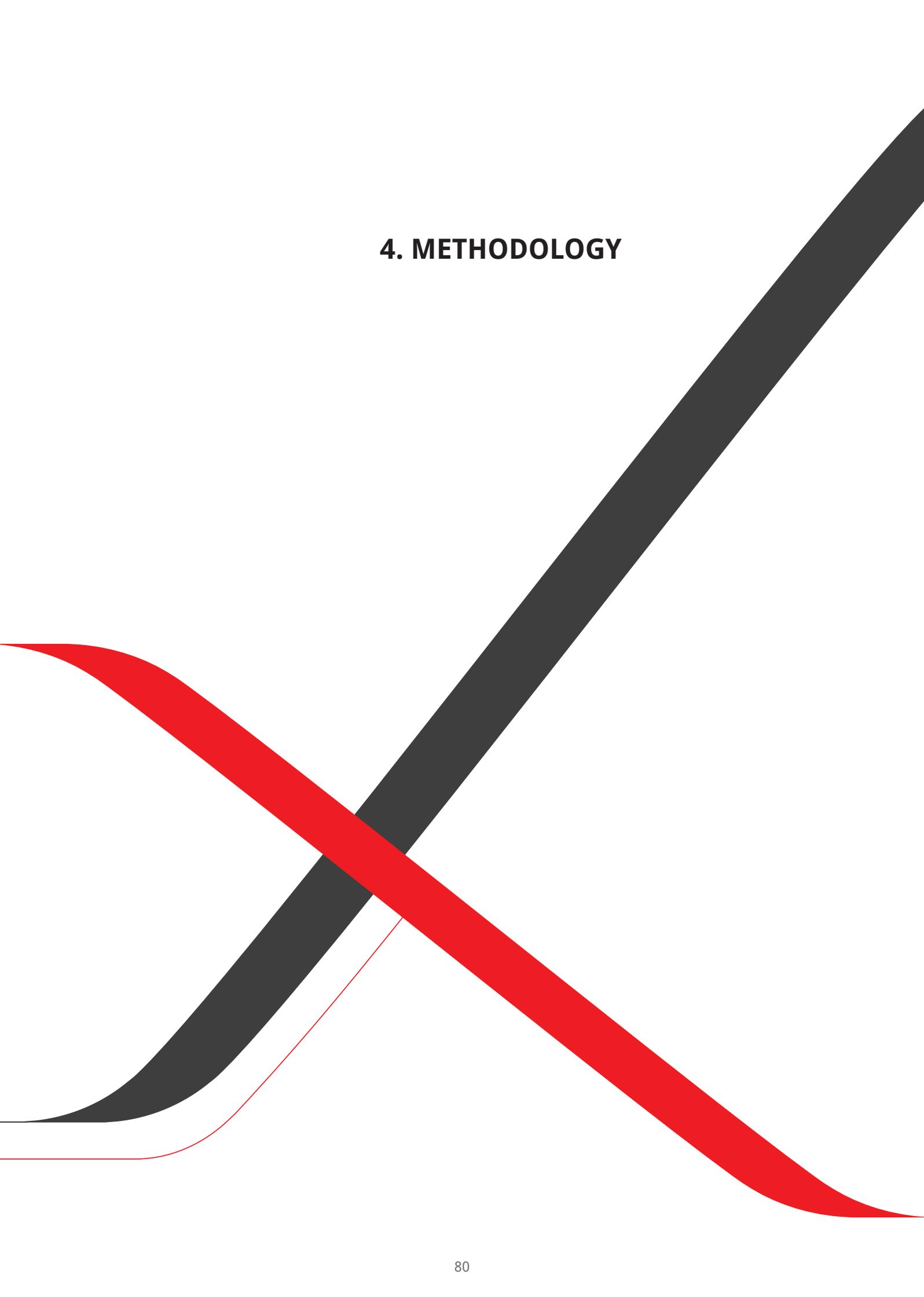
### **DEVELOP EDUCATIONAL CONTENT ON HOW TO PREPARE AND RESPOND TO NATURAL DISASTERS AND DISSEMINATE IT OUTSIDE THE TIMES OF NATURAL DISASTERS**

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

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

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

## 4. METHODOLOGY

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

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

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

## PHASE 1: FOCUS GROUP DISCUSSIONS

### Research design

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

### Sample

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

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

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

### Implementation and analysis

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

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

## PHASE 2: QUANTITATIVE SURVEY

### Research design

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

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

### Sample

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

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

The margin of error for the quantitative survey is  $\pm 2.71$ .

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

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

### Data collection and data entry

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

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

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

### Quality control

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

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

## Weighting

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

The final sample from the 2014 survey was compared both to the results of the 2000 census<sup>87</sup> (for age and gender variables) and to the sample from the 2011/12 study (for income variable). Please note that the data collected in 2011/12 was not weighted by age and gender, as the structure of the final sample was in line with the results of the 2000 census.

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

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

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

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