BHUTAN

INFORMATION AND MEDIA

IMPACT STUDY

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FINAL DRAFT

DEPARTMENT OF INFORMATION AND MEDIA

MINISTRY OF INFORMATION AND COMMUNICATIONS

ROYAL GOVERNMENT OF BHUTAN

TABLE OF CONTENTS

LIST OF FIGURES

LIST OF TABLES

INFORMATION AND MEDIA INDICATORS

Indicators	2003	2008	2013 (31/12/2012)
Bhutanese films	-	116	222
Bhutanese magazines	-	1	4
Books and publications by Bhutanese	207	1,181	2,832
Cable TV operators	33	52	58
Cable TV subscribers	15,000	30,000	22,185
Community Information Centers	-	45	100
Fixed-line telephone subscribers	23,657	27,937	27,005
Gewogs with mobile telephony services	-	98	205
Internet Service Providers	1	3	4
Internet subscribers	2,117	5,726	133,289
Mobile telephone subscribers	2,255	228,347	560,890
Newspapers	1	4	12
Radio sets	37,000	77,800	49,641
Radio stations	1	4	7
TV sets	35,000	47,125	74,846
TV stations/channels	1	1	2

Sources: MoIC / BICMA / NSB / BLSS 2012 / BMIS 2008 / BMIS 2003

EXECUTIVE SUMMARY

This report presents the findings of the third information and media impact assessment in Bhutan, the Bhutan Information and Media Impact Study 2013 (BIMIS 2013), within the context of the socio-economic and political changes in the country during the past five years.

The study was conducted over a period of six months, from November 2012 through April 2013, deploying both quantitative and qualitative research methods and tools. The objective of the study was to assess the impact of information and media on society, trends in media content and, pattern of information and media consumption, so as to facilitate development of appropriate policies for the effective development of the information and media industry in Bhutan.

Findings from the study show that the information and media environment has undergone a rapid change in the past five years due to socio-economic and political developments in the country, advances in information and communication technologies globally, and the increasing role of the media in a young democratic and evolving information society.

The study also identified the challenges facing the information and media industry, and provides a set of recommendations on information and media sector development in the country.

Bhutan's information and media landscape

The information and media environment in Bhutan has undergone unprecedented changes in the past decade with the liberalization of the information and media markets, in particular, newspapers, cable television and radio. Print media has mushroomed from 4 newspapers in 2008 to 12 in 2012. During the same period, the number of radio stations has increased from 4 to 7. Television, particularly satellite television, has become an increasingly pervasive medium, even among rural communities.

The study found that the gap between urban and rural areas with regard to access to and availability of one form of media or the other has decreased as compared to the 2008 findings

– 96% of the sampled households have access to media while only 4% do not have access to media. Most people in the country now receive information on issues that affect their lives from multiple sources. However, in terms of media content and preferences, coverage remains largely urban-centric and urban biased and the rural population has lesser information and content choices as compared to the urban population.

The rural masses still preferred Bhutanese radio and Bhutanese TV as their most reliable sources of news and entertainment while the urban audience preferred TV. DTH TV is more prevalent in rural areas whereas in urban areas, cable and BBS TV, online media and newspapers were accessed more.

New information and communication technologies (ICTs), particularly in the form of the internet and mobile telephony, have transformed information flow and communication patterns among all segments of the society. Although principally the preserve of the educated population, urban-oriented consumer, new ICTs are increasingly being used in a development context and are increasingly complementing the broader media changes to produce much more networked, horizontally connected society, in sharp contrast to the vertically connected society of a decade ago.

These changes, combined with others, and especially the successful transition to a parliamentary democracy in 2008 have fundamentally shifted the way in which Bhutanese people access information on issues that affect their lives and make their voices heard on decisions that shape their lives. They have exerted immense influence on how social norms and individual behaviours change, and provided fresh ways for citizens to hold the government to account and for government to provide information that the citizens need.

However, while many of the impacts of more open, democratic and crowded media environments have been positive, many concerns and challenges remain. New digital divisions between the rural and urban have emerged, resulting in a much broader information and voice divide. Most of the times, the rural masses are increasingly marginalized from public discourses and debates on issues that most affect them as these divides widen.

Media development challenges

The study findings show that the information and media sector in Bhutan is confronted with a number of challenges and issues, which negatively impacted the growth of a free and independent media vital for promoting democratic processes and good governance. Media development challenges include:

- Lack of media professionalism;
- Media sustainability mainly dependent on public sector advertising;
- Difficult access to public information;
- Unbalanced and urban-biased media coverage;
- Limited media literacy and public education programmes; and
- Legal, policy and regulatory challenges.

Most of these challenges are inherent in Bhutan's socio-economic constraints such as a small domestic market, inadequate infrastructure, rugged terrain, limited capital and human resources, very small pool of media experts and, absence of research and development initiatives.

Recommendations

Building on the findings of the study and in light of the challenges that media are confronted with under the current socio-economic and political scenario, the following set of recommendations are aimed to set legislative, policy, regulatory and business operations strategy and direction for the fast-changing information and media sector in Bhutan:

- Enhance media professionalism, through prioritizing implementation of a more focused and coordinated approach to human resources development involving key stakeholders for professional development of the information and media industry, among others.
- Information and media houses must deploy innovative sustainability measures, such as by exploring advertising market beyond public sector advertising – the mindset of the businesses needs to evolve into viewing advertising as part of their marketing and brand positioning, developing professional business continuity and sustainability strategies and plans, using new media (e.g., internet/social media and mobile applications) to reach and cover rural areas etc.

- Facilitate access to and proper use of public information, by putting in place necessary legal instruments (e.g. RTI Act), institutional arrangements and need-based capacity-building programmes.

- Foster pluralism and diversity of media, for instance, by introducing competition in the TV market, forging linkages between the media and civil society, and promoting development of local content relevant to all sections of the society.

- Broaden and accelerate media literacy and public education programmes, through educating all citizens to skilfully access media, understand and critically evaluate different aspects of the media and media content, as well as to create independent media and participate as active citizens in a democratic society.

- Review and reform legal, policy and regulatory frameworks, for instance, by simplifying and updating laws, policies and regulations, strengthening the regulatory agency, and enhancing professional capacities in the policy-making and regulatory bodies.

CHAPTER 1: INTRODUCTION

1.1   Background

The right to information and freedom of speech, opinion and expression are enshrined as the fundamental rights of all Bhutanese in The Constitution of the Kingdom of Bhutan along with the freedom of press, radio, television and other forms of electronic dissemination of information.

In line with this, the Bhutan Information, Communications and Media Act 2006 (BICM Act) has been enacted to foster growth and development of the information and media sector.

Subsequently, Bhutanese information and media has undergone rapid change since the start of the country's first national newspaper and radio station in the 1980s followed by television and Internet in 1999 and mobile telephony in 2003.

After the establishment of democracy in 2008, liberalization of media license, numerous magazines, private newspapers and FM radio stations have been established. A greater convergence of the media and ICT, proliferation of the cell phones, and wider use of the internet technology have brought about a new complexity to the information environment and this is expected to make a significant impact on the Bhutanese population.

Information and media are already a vital force that touches all national priorities and it is recognized as the most appropriate tool to overcome the challenges posed by a rugged terrain of the county and help the nation to deal with globalised world in era of information and technology. Information and media can foster transparency, accountability and efficiency in governance and create a responsive public sector that will foster the country's overarching goal of Gross National Happiness (GNH).

However, access to appropriate and timely information is a critical success factor to the development of a robust, sustainable democracy, and knowledge-based society.

It is, therefore, important to develop and maintain key measures to evaluate diversity, plurality and professionalism of information and media in Bhutan and in fulfilling the objectives of creating a connected and informed citizenry.

This could be made available by commissioning of periodic information and media impact studies. A comprehensive and well analysed media impact study will help decision makers in bridging the information gaps and in developing content that addresses the needs of listeners, viewers and readers and also to reach the unreached.

Towards this, various studies including the following were conducted:

- The Bhutan Media Impact Study 2003 (BMIS 2003), by the Department of Information and Media (DoIM), Ministry of Information and Communications (MoIC); and
- The Bhutan Media Impact Study 2008 (BMIS 2008), carried out in 2008, which was an updated version and expansion of BMIS 2003.

In this respect, BMIS 2008 assessed the public perception of media, access to media and media literacy in different segments of society, particularly women, youth and the rural population in addition to highlighting the challenges encountered by the media industry.

BMIS 2008 was successful in bringing pertinent issues to the fore for the government and other stakeholders including the industry, to set pragmatic strategy and direction for the information and media sector.

The main purpose of the Bhutan Information and Media Impact Study 2013 (BIMIS 2013) is to update this information. It reassesses the impact of the additional reach and intensity of programs adopted and makes recommendations to further enhance the professional development of the Bhutanese information and media sector. It should encourage analytical and healthy consumption of information and also enable appropriate policy measures to be instituted to facilitate greater participation of the media in Bhutan's socio-economic development.

1.2   Definitions

The following definitions of "information" and "media", as reproduced from the BICM Act, have been used for the purposes of this study:

"Information" includes information (whether in its original form or otherwise) that is in the form of a document, a signature, a seal, data, text, images, sound, or speech.

"Media" means relevant ICT services, including broadcasting and where pertinent, also includes: newspapers, books, journals, periodicals, brochures, pamphlets, circulars, magazines, publications and other works made available to the general public in printed and/or electronic form or format; cinematographic films, performance of dramas and other entertainments made accessible to the general public; radio and television channels and/or stations broadcasting to the general public (whether terrestrial or satellite-based); the Internet accessible to the general public; Internet-based suppliers of information, news and entertainment accessible to the general public; and news agencies engaged in collecting, processing and collating news reports, feature articles and/or other material, or supplying such material to any of the aforesaid media, for the purposes of public dissemination.

1.3   Objectives of the study

The main objective of BIMIS 2013, as per the Terms of Reference (ToR) for consultancy service, is to assess the impact of media on society, trends in media content and pattern of information and media consumption, so as to facilitate development of appropriate policies for the effective development of the information and media sector in Bhutan.

In order to do so, the study focussed on topics and issues including:

(a)   Growth and development of information and media in Bhutan;

(b)   Role of information and media in the implementation of development activities, dissemination of government policies, laws, rules and regulations, and maintaining transparency, accountability and efficiency of the government;

(c)   Social change;

(d)   Analysis of information and media habits/consumptions;

(e)   Credibility of media through surveys;

(f)   Role of information and media in democracy including engaging public in discourse;

(g)   Accessibility and/or reach of information and media;

(h)   Sustainable issues of media agencies;

(i)   Professionalism of Bhutanese media;

(j)   Challenges of Bhutanese media in its development.

CHAPTER 2: METHODOLOGY

2.1   Research approach

Building upon the Bhutan Media Impact Study 2008 and other publicly available information and media sector documents published during the period 2003 through 2012, the Bhutan Information and Media Impact Study 2013 followed a four-stage research process as follows:

Figure 1: Research approach and methodology

COMPARATIVE STUDY / DESK RESEARCH
• Describing the context and background on which field findings can be projected
• Based on previously available data and information

QUANTITATIVE SURVEY
• Identifying behaviour patterns
• Input from the field (household survey)

QUALITATIVE SURVEY
• Identifying behaviour patterns, opportunities and trends
• Input from the field (focus group discussions and in-depth interviews) and experts (literature review, focus group discussions and in-depth interviews)

ANALYSIS AND FINDINGS
• Illustrating the identified behaviour patterns, opportunities and trends
• Examples of good practice and recommendations

2.1.1 Comparative study / desk research

The study reviewed existing literature and studies related to the information and media sector in Bhutan. A comparative desk research of the Bhutan Media Impact Study 2008, Media Development Assessment 2010, HRD Master Plan for Media (2012-2016), Media Baseline Study 2012 and other relevant documents was also conducted.

The list of literature review and other relevant documents is in Annexure 1.

2.1.2 Quantitative survey

The quantitative survey questionnaire (QTS 2013) was based on the BMIS 2008 survey questionnaire, to enable comparison of results and trend analysis on a like basis, to the extent possible. The draft QTS 2013 was refined based on several rounds of discussions with DoIM/MoIC. The final version of QTS 2013 took into account, among others, the additional research objectives of BIMIS 2013 based on the recommendations of the research team and feedback from DoIM/MoIC.

The final version of the QTS 2013 was presented to a cross-section of stakeholders on 14 December 2012 and was reviewed and approved by the National Statistics Bureau (NSB) on 21 December 2012.

(a)   Scope of questions

The questionnaire, given in Annexure 2, comprised of questions classified into 13 sections, viz.:

    A.   Demographics
    B.   General Information and Media
    C.   Information and Media Coverage
    D.   Information and Media Use and Consumption
    E.   Media Credibility and Influence
    F.   Media and Democracy
    G.   Preservation of Culture
    H.   Radio Specifics
    I.   Television Specifics
    J.   Mobile Phone Specifics
    K.   Print Media Specifics
    L.   Film Specifics
    M.   Internet Use Specifics

(b)   Coverage of dzongkhags

The study covered six dzongkhags (districts), viz. Thimphu, Chhukha, Wangdue Phodrang, Sarpang, Monggar, and Samdrup Jongkhar, representing two each from the Western, Central and Eastern regions.[1] To allow for heterogeneity of sampling, the three regions were sub-divided into northern and southern sub-regions.

(c)   Coverage of households

A total of 2,257 sample households were interviewed for the quantitative survey. As per NSB definition, a household is a person or group of persons, related or unrelated, who live together and have common cooking arrangements.

The study coverage areas are shown in the map below.

Figure 2: Household survey coverage areas

Dzongkhags covered under BMIS 2008

Additional Dzongkhags covered under BIMIS 2013
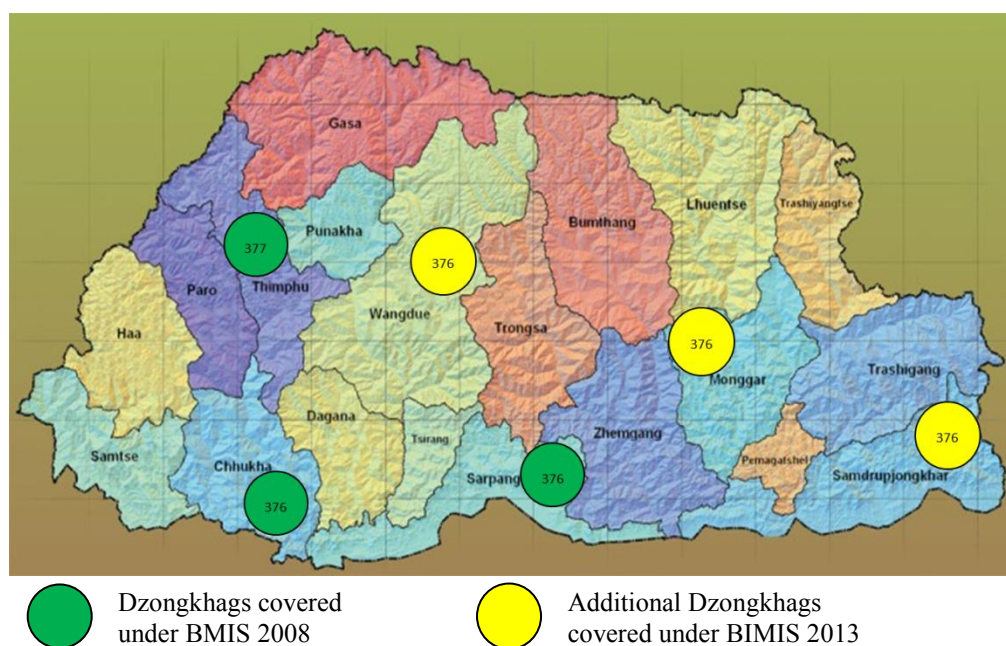
(d) Sample design

The sampling frame for rural areas was based on the Population and Housing Census of Bhutan (PHCB) 2005 while for urban areas, the frame was from the urban listing carried

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[1] As per NSB classification, maintained for statistical purposes, the Western region includes Chhukha, Gasa, Haa, Paro, Punakha, Samtse and Thimphu Dzongkhags; the Central region includes Bumthang, Dagana, Sarpang, Trongsa, Tsirang, Wangdue Phodrang and Zhemgang Dzongkhags; and the Eastern region includes Lhuentse, Monggar, Pema Gatshel, Samdrup Jongkhar, Trashigang and Trashi Yangtse Dzongkhags.

out in February-March 2012. The Primary Sampling Unit (PSU) was Enumeration Areas (EAs) for urban areas (towns) and Chiwogs for rural areas. Households formed the Secondary Sampling Unit (SSU) for both urban and rural areas, selected randomly using circular systematic sampling method.

(e)   Sample size and distribution

For the survey design based on random probability sampling, the sample size required was calculated using the following formula:

$$n = \frac{z_{\frac{\alpha}{2}}^2 \cdot p(1-p) \cdot f \cdot n_r}{e^2},$$

where,

        n = required sample size (per region)

        z = confidence level at 95% (standard value of 1.96)

        p = proportion of households owning TV sets, as per BLSS 2007 and PHCB 2005

          = 0.37 (= 47,125/125,484)

        f = design effect (standard value of 2)

        n_r = non-response rate of 1.05, assuming 5%

        e = margin of error at 5% (standard value of 0.05)

Thus, n = 752.2. Therefore, sample size per region was set at 752.

For the three regions, n (total) = 753 + 752 + 752 = 2,257.

The distribution of sample is shown in the tables below:

Table 1: Sample distribution

Type of area	Total[2]		Sample for BIMIS 2013	
	EAs/Chiwogs	**Households**	**EAs/Chiwogs**	**Households**
Urban	275	37,757	24	932
Rural	1,905	87,727	48	1,325
Total		**125,484**		**2,257**

[2] Results from the Population and Housing Census of Bhutan (PHCB) 2005 / Bhutan Living Standards Survey (BLSS) 2007.

Table 2: Distribution of Sampled EAs/Chiwogs/Households

Region	Dzongkhag	Urban		Rural		Total	
		Sample EAs	Sample HHs	Sample Chiwogs	Sample HHs	Sample EAs/Chiwogs	Sample HHs
West	Thimphu	8	322	2	55	8/2	377
	Chhukha	5	178	7	198	5/7	376
Central	Wangdue Phodrang	3	118	9	258	3/9	376
	Sarpang	3	133	9	243	3/9	376
East	Monggar	2	73	11	303	2/11	376
	Samdrup Jongkhar	3	108	10	268	3/10	376
		24	**932**	**48**	**1,325**	**24/48**	**2,257**

(f)   Survey teams

Three survey teams, comprised of 4 enumerators and a supervisor each, carried out the individual household surveys, in parallel, from 26 December 2012 through 9 February 2013.

Three of the core consulting team members also monitored and supervised the field survey teams to ensure quality completion of the works as planned.

(g)   Method of data collection

The one-on-one direct interview method was used to collect data in the six dzongkhags.

Interviews were conducted in the language preferred by interviewees, i.e. in English or Dzongkha or a local dialect.

(h)   Data entry and processing

Data entry and processing was done in CSPro (Census and Survey Processing System) by a team of three data entry personnel, from 13 February 2013 through 28 February 2013, under strict supervision of the data manager.

Data management and statistical analysis was then conducted using SPSS (Statistical Package for the Social Sciences) from 1 March 2013 through 20 March 2013.

2.1.3 Qualitative study

The qualitative study questionnaire (QLS 2013) was largely based on BMIS 2008 questionnaire, to enable comparison of results and trend analysis on a like basis, to the extent possible. The draft QLS 2013 was refined based on several rounds of discussions with DoIM/MoIC. The final version of QLS 2013 took into account, among others, the additional research objectives of BIMIS 2013 based on the recommendations of the research team and feedback received from DoIM/MoIC.

The final version of the QLS 2013 was presented to a cross-section of stakeholders on 14 December 2012 and was reviewed and approved by DoIM/MoIC on 21 December 2012.

During the period from 1 January 2013 through 28 February 2013, 17 Focus Group Discussions (FGDs) and 21 In-Depth Interviews (IDIs) were conducted with stakeholders and players in the information and media sector, as well as with national and international experts in the field of information and media. Formats and questions reviewed by the first stakeholders' consultative meeting of 14 December 2012 were used for both the FGDs and IDIs. Focus group participants and interviewees were selected in the sample EAs/Chiwogs under the six sample dzongkhags, and comprised of a cross-section of the society, viz. farmers, women, youth, children, monks, civil servants, corporate employees, business community, parliamentarians and civil society.

The Focus Group Discussion list is in Annexure 3 and the In-Depth Interview list in Annexure 4.

2.2   Limitations of the study

Respondent fatigue is a well-documented phenomenon that occurs when survey respondents become tired of the survey task and the quality of the data they provide begins to deteriorate. It occurs when survey respondents' attention and motivation drop toward later sections of a questionnaire. Tired or bored respondents may more often answer "don't know", engage in "straight-line" responding (i.e. choosing answers down the same column on a page), give more perfunctory answers, or give up answering the questionnaire altogether. Hence, one of the behaviour outcomes of cognitive fatigue is satisficing, which is defined as doing just enough work to satisfy the task at hand.

Thus, the causes for, and consequences of, respondent fatigue, and possible ways of measuring and controlling for it, should be taken into account when deciding on the length of the questionnaire, question ordering, survey design, and interviewer training.

The above was highlighted to, and discussed with DoIM/MoIC and various stakeholders during the consultative period from 11 December 2012 to 20 December 2012. The survey team designed the QTS 2013 and QLS 2013 to reduce the impact of respondent fatigue by streamlining the survey questions and focus group questions while balancing the need to obtain responses relating to new influential forms of media such as social media. In addition, the scope, nature and structure of the survey and the focus group sessions were also taken into account when developing the questions and the training sessions for the survey teams.

The final versions of the QTS 2013 and QLS 2013 were approved by DoIM/MoIC on 21 December 2012.

CHAPTER 3: DEMOGRAPHIC CHARACTERISTICS

BIMIS 2013 collected information on the age, gender, occupation, education, income and area of residence of the sampled households.

This chapter looks at the following demographic characteristics: area of residence, gender, age, education, occupation and income of the sampled population.

Out of the 2,257 sampled households, 63% were rural respondents while 37% were urban respondents. This is indicative of the actual proportion of rural and urban population distribution in the country.

Figure 3: Survey sample by area of residence
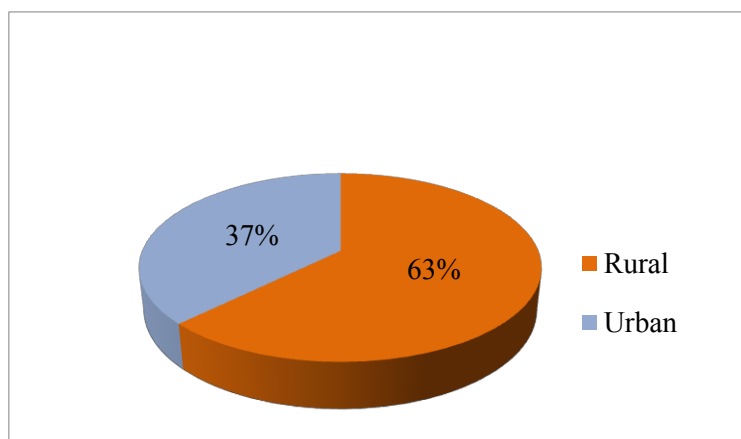
54% of the sampled respondents were female and 46% male. This proportion is also close to the proportion of female and male distribution in the country.

Figure 4: Survey sample by gender
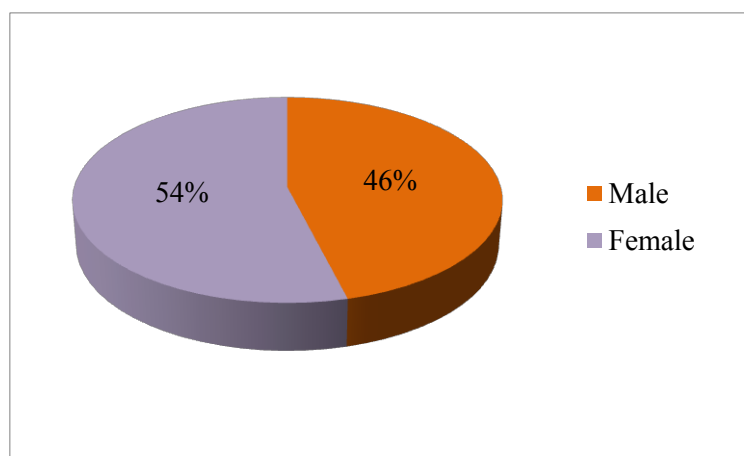
Majority of the survey respondents (31%) were in the 26 – 35 years category, followed by those in the 18 – 25 year and 36 – 55 year brackets (27%), indicating a good mix of youth, adult and older people respondents.

9% of the respondents were in the 56 years and above category while 5% were in the less than 18 years age category.

Figure 5: Survey sample by age
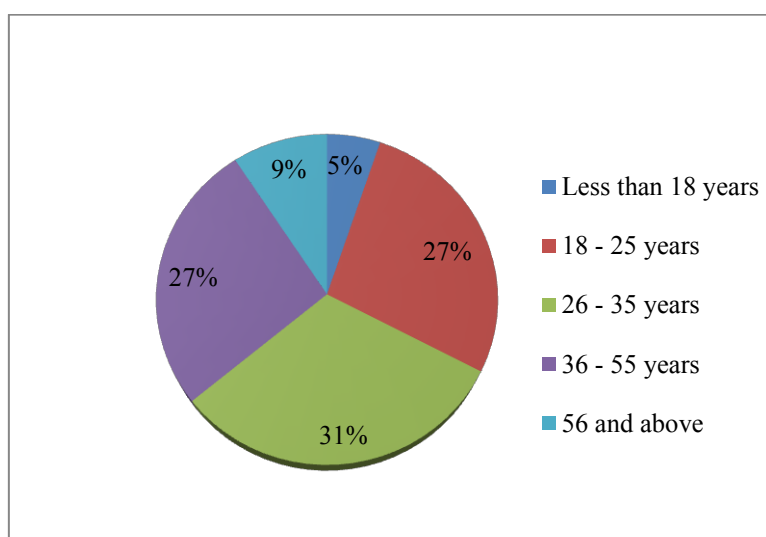
34% of the respondents did not have any education, 17% studied up to class 10, 15% studied up to class 12, 12% were university graduates (bachelors and above), 10% studied up to class 6, and the rest had non-formal education or diploma or monastic education.

Figure 6: Survey sample by education
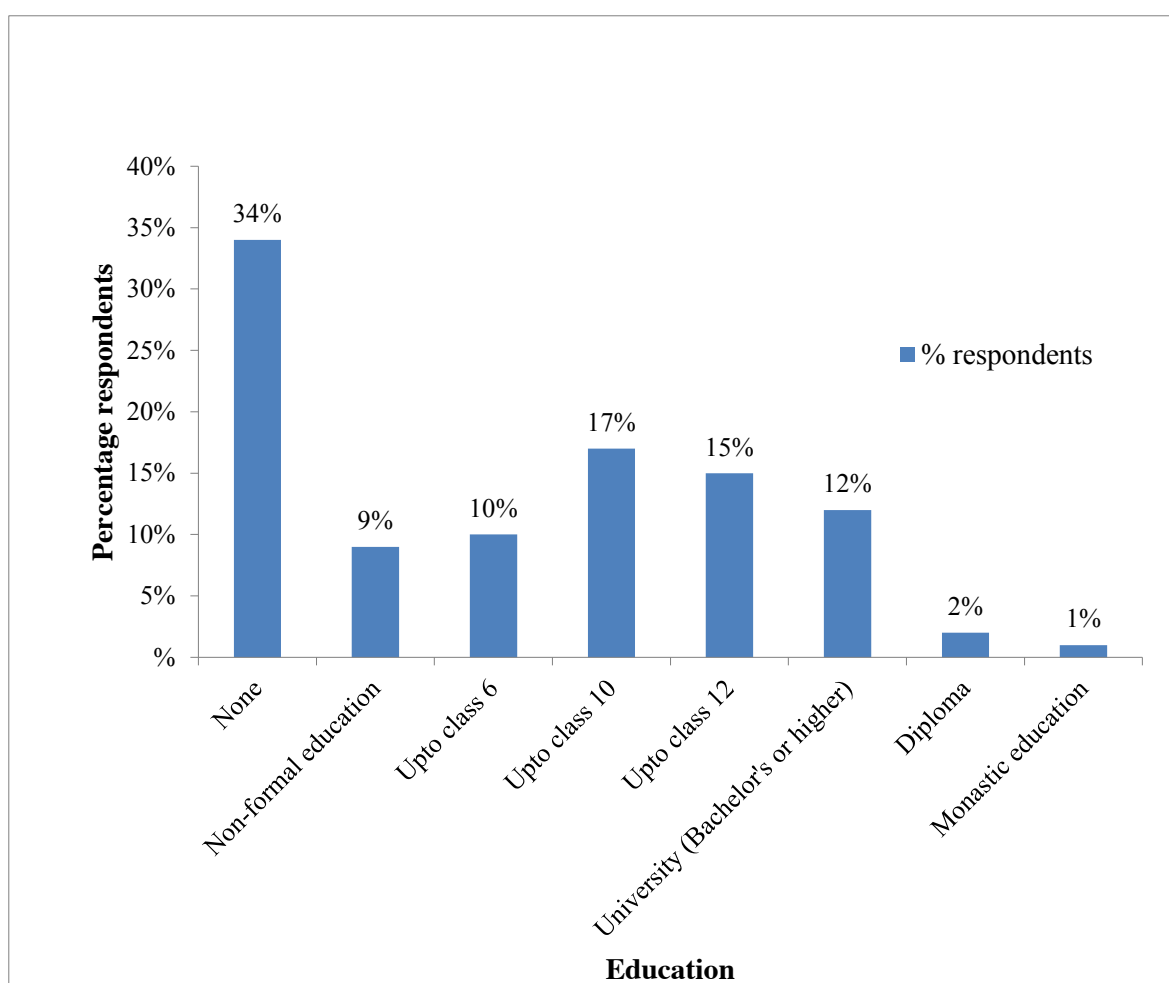
By occupation, 29% of the respondents were farmers and 20% were students, followed by businessmen/women, home-makers and civil servants.

Figure 7: Survey sample by occupation
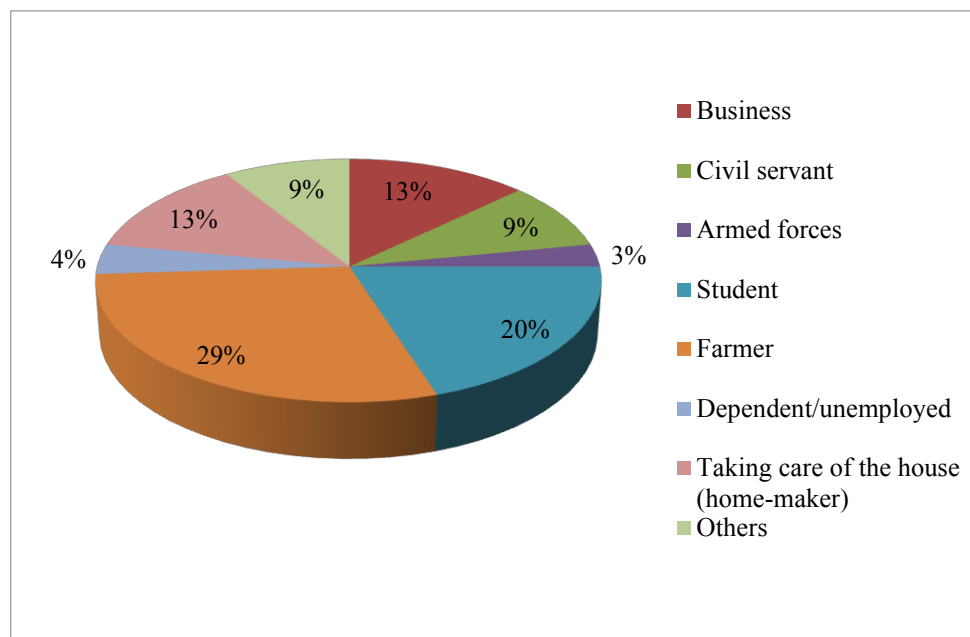
In rural areas, majority of the respondents (47%) had a monthly income of less than Nu. 6,000, and 28% had between Nu. 6,001 to Nu. 10,000. Only 5% of the respondents had a monthly income above Nu. 22,000.

In urban areas, 30% of the respondents had a monthly income of more than Nu. 25,000, 20% had between Nu. 6,001 to Nu. 10,000, 16% had between 14,001 to Nu. 18,000, and 11% had a monthly income between Nu. 18,001 to Nu. 22,000. Only 6% of the urban respondents had a monthly income less than Nu. 6,000.

Figure 8: Survey sample by income and residence
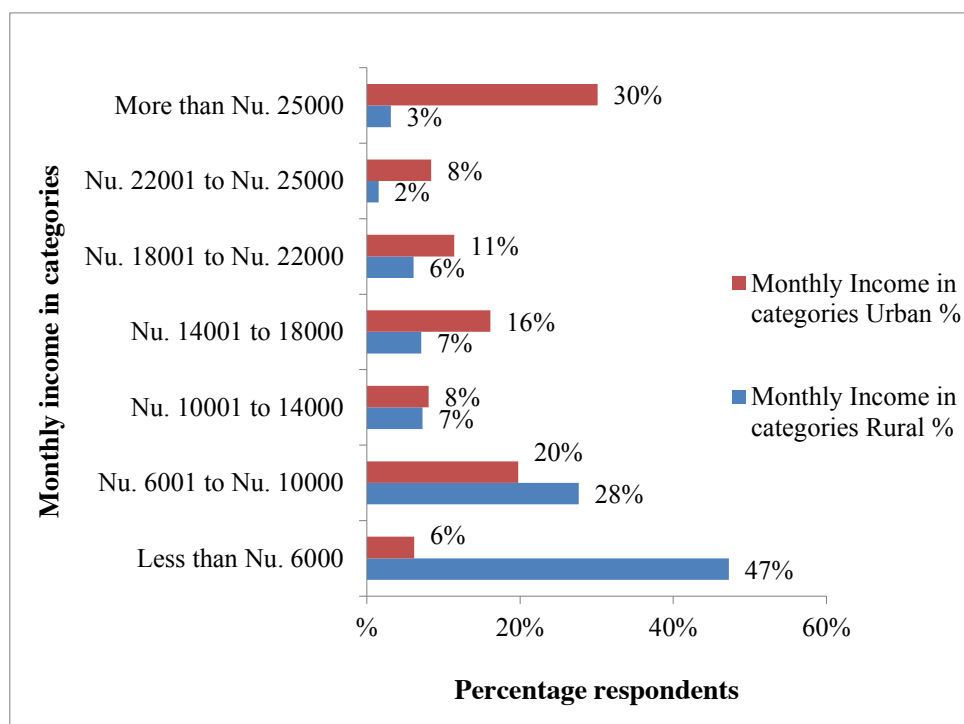
CHAPTER 4: ACCESS TO INFORMATION AND MEDIA

Access to information and media has increased manifold in the past five years, fuelled by a liberal market policy environment, rapid expansion of information and media infrastructures and, deployment of new information and communication technologies and services.

Article 7, Section 3 of the Constitution of the Kingdom of Bhutan guarantees the right to information to all citizens.

The Media Baseline Study 2012 (MBS 2012) stated that media audiences now have hundreds of sources to access information. However, in the absence of a proper mechanism for information sharing and dissemination, media organizations have indicated challenges in accessing information from government and other public agencies.

The Media Development Assessment 2010 (MDA 2010) also mentioned that lack of access to media platforms and communication channels, especially in rural areas, were preventing people from expressing views and participating in public discussions. It, however, noted that the government was expanding internet connectivity and its use for improving information access and governance.

Based on official data and statistics, the Bhutanese information and media market grew significantly between 2008 and 2013. The number of newspapers has grown from 3 to 12; number of local radio stations increased from 4 to 7; number of national TV channels has increased from 1 to 2; number of locally produced movies has also increased from 116 to 222; and, number of books and publications by Bhutanese authors have increased from 1,181 to 2,832.

Social media (e.g. Facebook, Twitter, LinkedIn etc.) are picking up fast among the urban literate population and provides a unique platform for public discourse on governance and development issues, and the dissemination of real-time news and views.

4.1   Information and media asset ownership

According to the Bhutan Living Standards Survey 2012 (BLSS 2012), the most widely owned asset in Bhutanese households, in both urban and rural areas, is the mobile phone, with 92.8% of households owning a mobile phone, followed by 58.5% owning a TV set and 38.8% owning a radio set.

In 2007, as per BLSS 2007, the most widely owned asset was the radio set (62%), followed by the mobile phone (39.3%) and then ownership of the TV set (37.7%).

Thus, in terms of information and media asset ownership, mobile phones have now taken over as the most widely owned asset, in both urban and rural areas, followed by ownership of TV sets and radio sets. Computers are the least owned asset with only 16.4% of the Bhutanese households owning a computer.

Figure 9: Information and media asset ownership by urban/rural

	Mobile phone	Television	Radio	VCR/VCD/DVD	Camera	Computer
Urban	96.7	86.8	32.6	49.9	33.3	33.4
Rural	90.7	43.9	42	29.3	8.7	7.7
Total	92.8	58.5	38.8	36.3	17.1	16.4
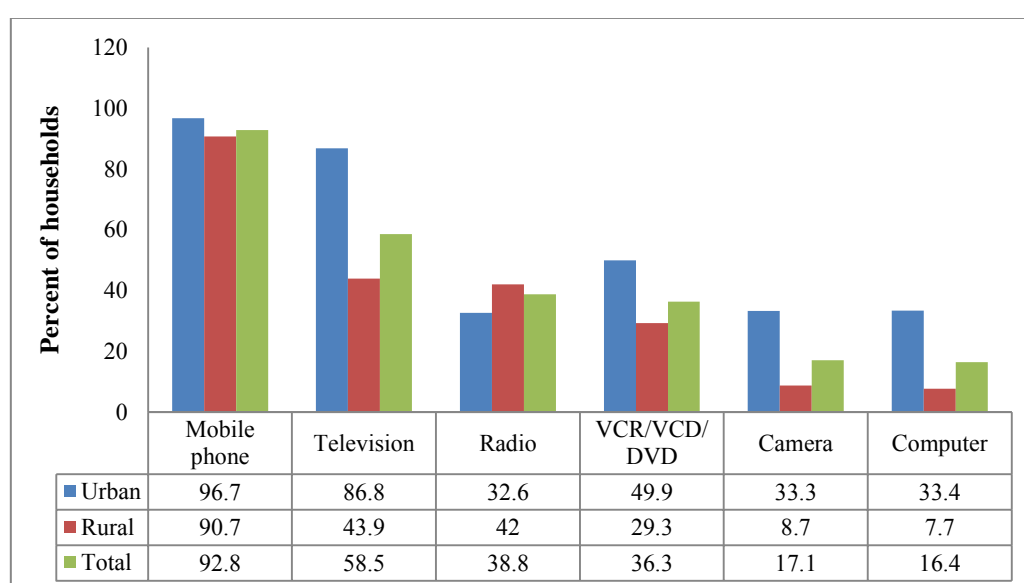
4.2   Access to media by area of residence

BIMIS 2013 survey data and analysis reveal that a majority of the population now have access to one form of media or the other. Besides, the gap in the access to information and media between urban and rural areas has also reduced, as compared to the findings in BMIS 2008.

100% of urban households covered by the survey had access to media while 94% of the rural households had access and 6% do not have access.

This figure indicates high accessibility to media, not just in urban areas but also in rural areas. In total, 96% of the total households have access to some form of media or the other. The 4% who did not have access to media were farmers and other rural respondents.

Figure 10: Access to media by urban/rural
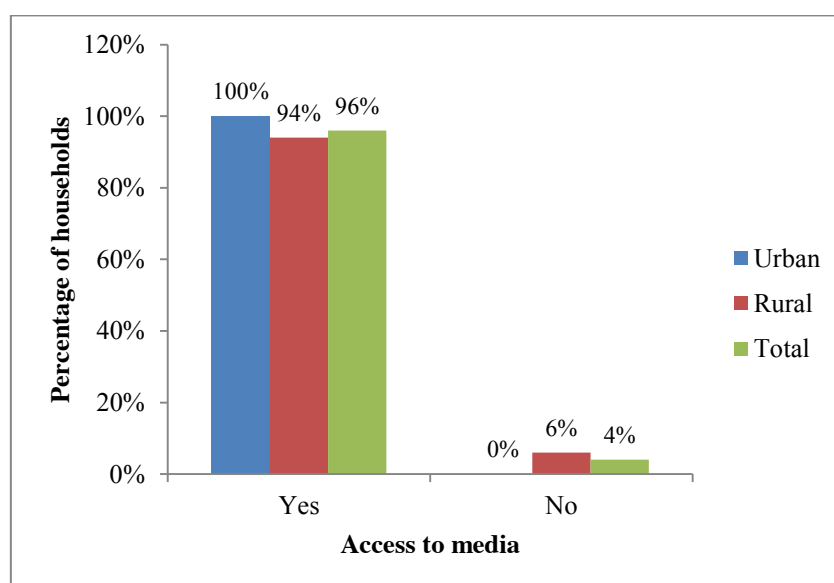
BMIS 2008 showed a disparity in access to media between urban and rural areas and identified an urban-rural bias in access to media. **BIMIS 2013 shows that by and large the gap between urban and rural areas in terms of access to media and information has been narrowed to a great extent. The greater access to and availability of information and media in both urban and rural areas can be attributed to the explosion of a number of media outlets in the past five years. The expansion of the media as an industry in itself has also encouraged greater penetration in rural areas compared to 2008.**

4.3   Radio

While the number of radio sets has decreased from 77,800 in 2008 to 49,641 in 2012, radio services reach the largest segment of the Bhutanese population. The decrease in the radio sets has been largely compensated for by the fast increase in the mobile phone coverage, given

that most mobile phones have radio reception functionality besides its standard voice communication utility.

Radio is still the most popular mode for the rural lot. People rely on radio for information, news and entertainment to keep up with the rest of the country. BBS radio reaches all 20 dzongkhags while Kuzoo FM, an entertainment channel, covers 18 dzongkhags. However, other FM radio stations that mostly air entertainment and music programmes are cluttered in Thimphu and cater to a cross section of urban listeners.

4.4   Television

In contrast to the decreasing ownership of radio sets in the country, the number of TV sets has almost doubled in the past five years, increasing from 47,125 in 2008 to 74,846 in 2012, which shows enhanced access to TV services among the population. **Most gewog offices and community centers in rural areas have access to BBS TV while most urban areas have access to cable TV services.**

Survey data shows that 88% of the urban households paid their TV rental to local cable operators while only 25% of the rural households paid their rental to local cable operators. This indicates limited cable TV coverage in rural areas as compared to urban areas.

Interestingly, 13% of rural respondents said they paid their TV rental to agents in India while only 2% of the urban respondents said they paid their TV rental to agents in India. This indicates **proliferation of DTH TV in rural areas as compared to urban areas, making up for the limited cable TV coverage in rural areas.**

15% of rural respondents and 3% of urban respondents watched TV but did not pay anyone, which refer to households with 'informal' TV connections and/or access to free-to-air channels only.

Figure 11: TV rental payment by rural/urban
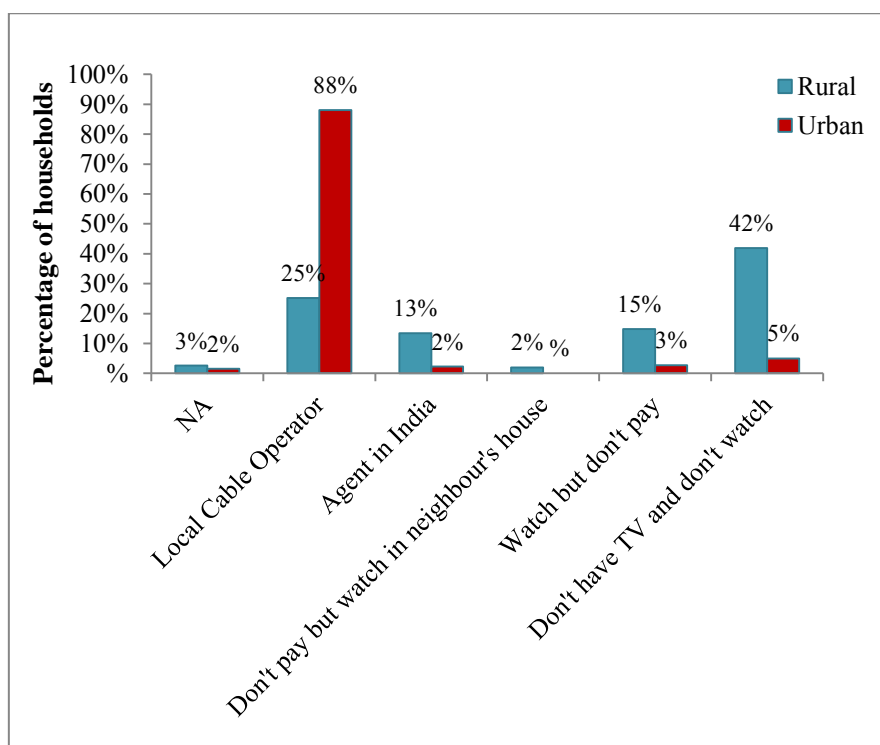
Majority of the households owned a TV set: 79% of rural households and 68% of urban households.

However, 30% of urban households and 11% of rural households now owned 2 – 3 TV sets, which shows increasing disposable income as well as changing TV viewing preferences and patterns among the Bhutanese society. Some 10% rural households and 2% urban households did not own any TV set.

Figure 12: TV sets owned by rural/urban
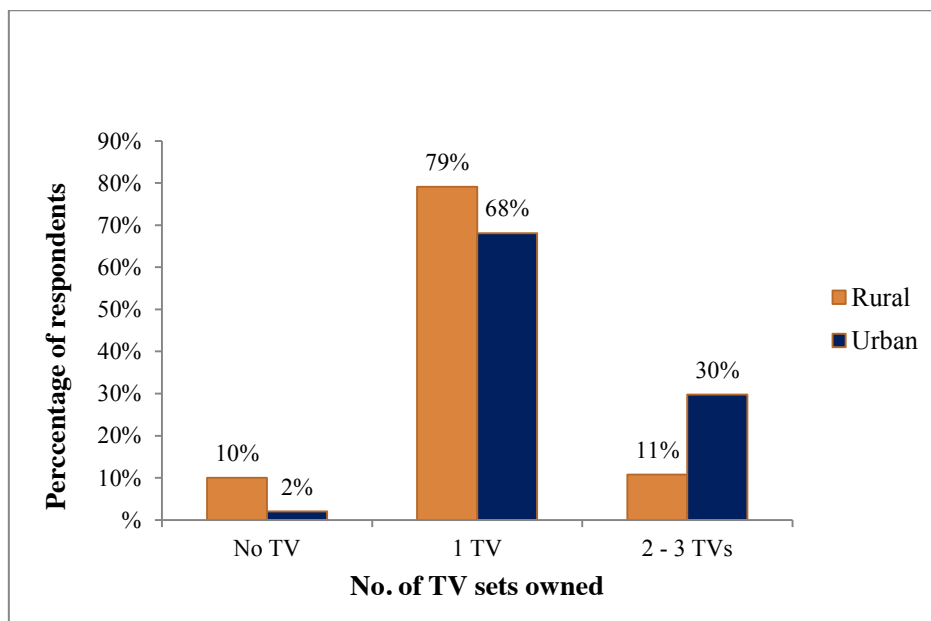
4.5　Mobile phones

The number of mobile subscribers has more than doubled in the past five years, from 228,347 in 2008 to 560,890 in 2012, covering all the 205 gewogs, as per the Annual InfoComm & Transport Statistical Bulletin, MoIC (4th Edition, March 2013). This equates to more than 2 in 3 persons owning a mobile phone.

Survey data also showed that people spent the most on mobile phones both in urban and rural areas. Interestingly, more of the rural population (12%) used mobile phones for entertainment than urban respondents (2%).

Mobile phones were mostly used the most for:
- talking (voice communication),
- listening to music (65%),
- taking photos and videos (64%),
- SMS (49%),
- playing games (39%),
- viewing videos (38%), and
- listening to radio (24%).

The above findings suggest the switch from a purely functional use of the mobile phone to one that integrates convenience with fun.

While mobile phones were increasingly used for browsing the internet (22%), MMS was yet to pick up (1%) apparently due to less number of 3G subscriber base.

Figure 13: Mobile phone use
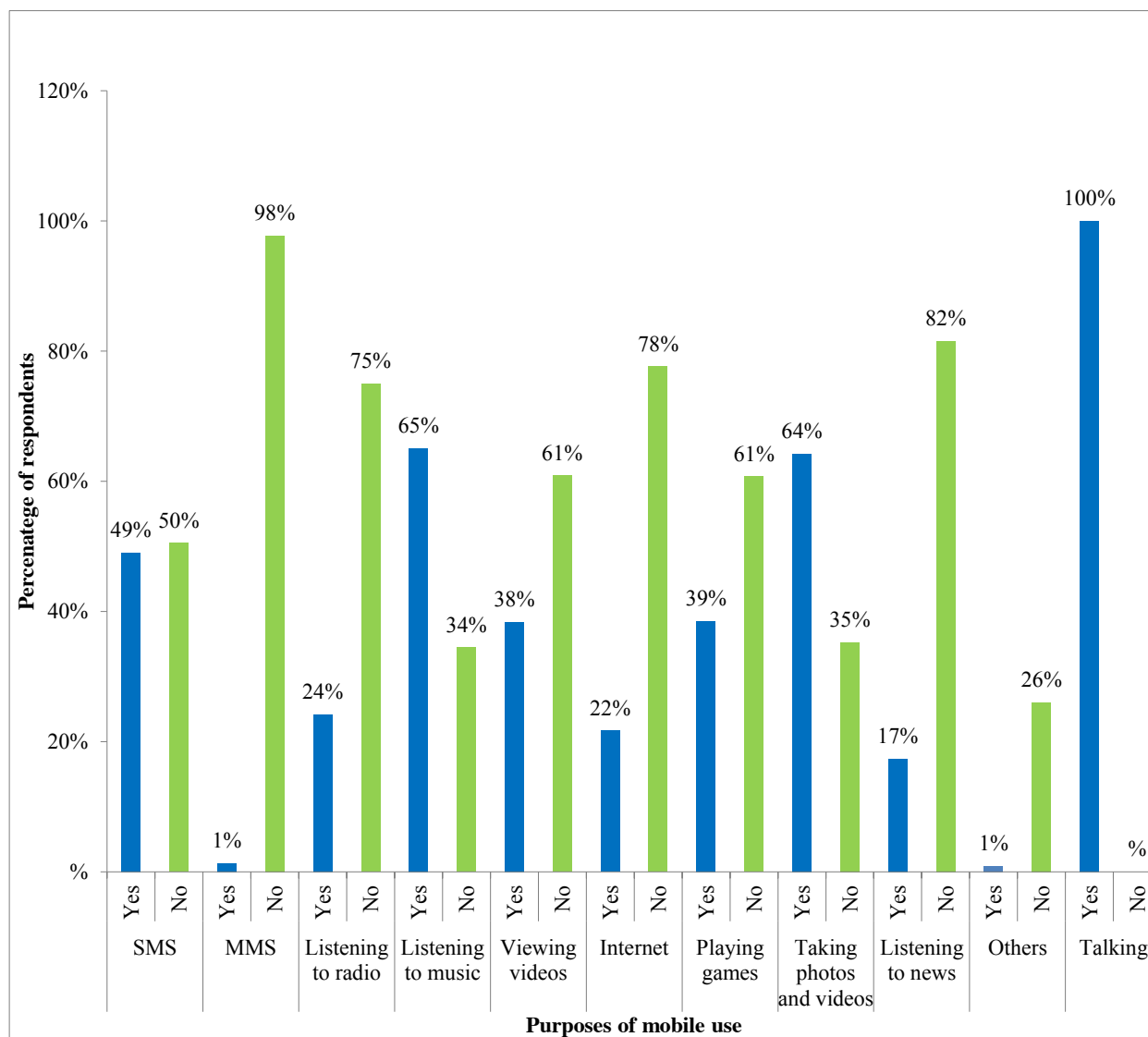
4.6 Internet

The number of Internet subscribers has increased from 5,726 in 2008 to 133,289 in 2012, as per the Annual InfoComm & Transport Statistical Bulletin, MoIC (4th Edition, March 2013).

BIMIS 2013 survey found that only 23% of the survey respondents have access to the internet, which shows the urban bias of this new media platform among the educated segment of the population.

Figure 14: Access to internet
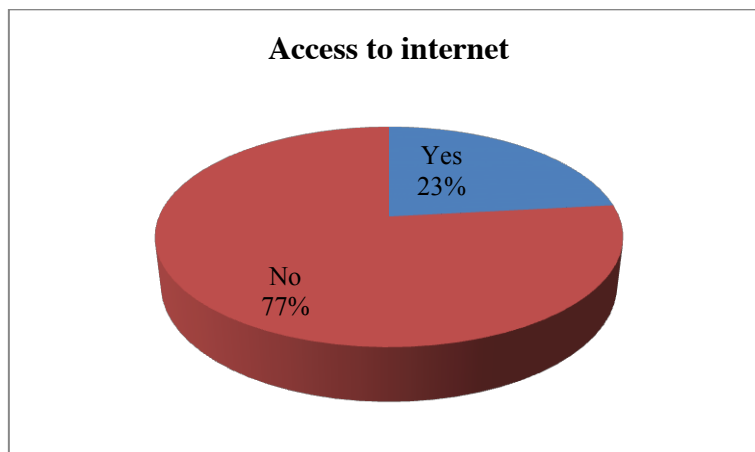
Of those who have stated that they have access to internet, 48% accessed internet from their homes, 25% from offices, 14% on the move, and 12% at Internet cafés.

Although Community Information Centers were made available in the rural areas, it was interesting to note that the respondents from the rural areas still did not perceive that they had access to the internet.

Among other possible implications, it suggests that there is a need to increase the user receptiveness, adoption and effectiveness of such public facilities through education and other measures. However, this must be verified and validated via further studies and investigations.

Figure 15: Place to access internet
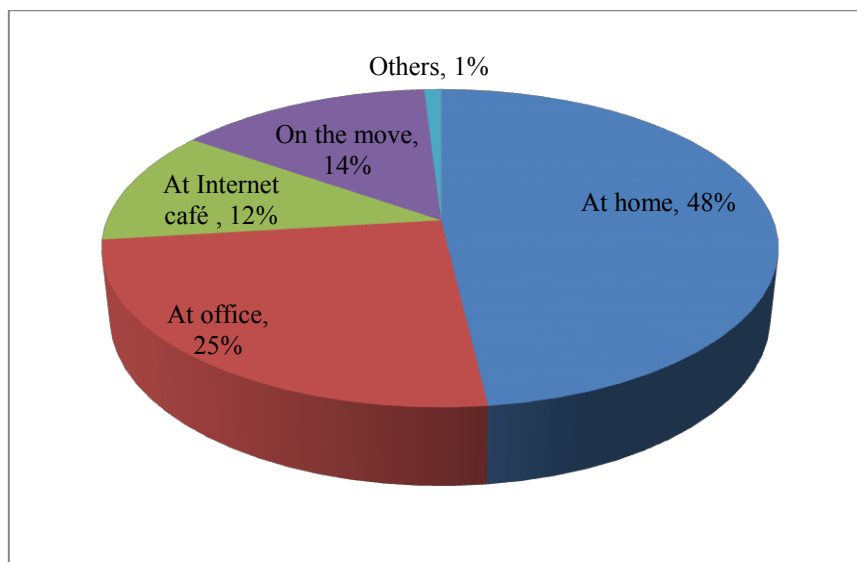
4.7   Newspapers

The number of newspapers increased from 4 in 2008 to a staggering 12 in 2012, providing the literate population with more choice of news, views and other content.

BIMIS 2013 survey shows that Bhutanese newspapers were more popular in urban areas than in rural areas given the concentration of the educated population in urban areas and the urban-centric model of the newspaper businesses.

4.8   Affordability of media

4.8.1 Price of Bhutanese newspapers

Bhutanese newspapers were found to be generally affordable in both rural and urban areas with prices ranging from Nu. 5 to Nu. 15, as of 31 January 2013.

87% of the sample rural population and 83% of the sample urban population said Bhutanese newspapers were affordable. On an average, only 2% of the sample population said the prices of Bhutanese newspapers were expensive.

4.8.2 Price of Bhutanese magazines

Bhutanese magazines were found to be expensive by most rural respondents whereas most urban respondents found them affordable.

36% of the sample rural population said Bhutanese magazines were expensive whereas 44% of the sample urban population said Bhutanese magazines were affordable.

33% of the sample rural population said magazines were affordable whereas 37% of the sample urban population said they were expensive.

4.8.3 Price of books by Bhutanese authors

The prices of books by Bhutanese authors were found to be relatively expensive.

48% of the sample rural population said books by Bhutanese authors were expensive while 56% of the sample urban population said they were expensive.

22% of the sample rural population said books by Bhutanese authors were affordable while 26% of the sample urban population said they were affordable.

4.8.4 Price of Bhutanese movie tickets

The prices of Bhutanese movie tickets were found to be relatively expensive.

33% of the sample rural population said movie ticket prices were expensive while 41% said they were affordable. 34% of the sample urban population said movie ticket prices were expensive while 35% said they were affordable.

23% of the rural sample population and 27% of the urban sample population said they didn't know if the price of a movie ticket was expensive or affordable or cheap, which indicates that a large chunk of the population did not go to watch movies in cinemas.

Table 3: Affordability of media by rural/urban

Price of media	Rural				Urban			
	Expensive	Affordable	Cheap	Don't know	Expensive	Affordable	Cheap	Don't know

Bhutanese newspaper	2%	87%	8%	3%	2%	83%	12%	3%
Bhutanese magazines	36%	33%	2%	29%	37%	44%	2%	17%
Books by Bhutanese authors	48%	22%	1%	29%	56%	26%	2%	16%
Bhutanese movie ticket	33%	41%	2%	23%	34%	35%	3%	27%

There are a significant percentage of respondents from both the rural and urban areas who indicated that they do not know if the prices of magazines, books or movie tickets, as the case may be, are expensive. This could possibly be attributed to the lack of reading habits and personal interest in such publications. However, further studies would be required to verify this possible implication.

4.9   Languages used to access media

Access to information and media is also dependent on the languages used for media. In Bhutan, media are available in *Dzongkha* (national language), English (working language), *Lhotsamkha* and *Sharchopkha*.

***Dzongkha* is the language most people used to watch Bhutanese TV (46.4%) and listen to Bhutanese radio (24.9%), compared with people who watch/listen to the English programmes (13.9% for TV and 8.2% for radio).**

28.1% of the respondents read Bhutanese newspapers in English and 4.3% read in Dzongkha. 19.3% read Bhutanese websites in English and 0.4% read in *Dzongkha*.

In addition to *Dzongkha* and English languages, Bhutanese radio programmes are broadcast in *Sharchopkha* and *Lhotsamkha*. **11.2% of the respondents listened to Bhutanese radio in *Sharchopkha* and 5.2% listened to in *Lhotsamkha*.**

Based on the BIMIS 2013 survey, there was a decrease in respondents who watched Bhutanese TV in *Dzongkha* language (46.4%)   and a decrease in those who listened to radio programmes in *Dzongkha* (24.9%). Only 4.3% read *Dzongkha* newspapers.

In contrast, BMIS 2008 showed that 48.5% of survey respondents watched Bhutanese TV in *Dzongkha* language while 52.2% listened to radio programmes in *Dzongkha*. 13.7% of the respondents read *Dzongkha* newspapers.

73% of the respondents did not use Bhutanese websites, 66% did not use Bhutanese newspapers, 48% did not use Bhutanese radio and 37% did not use Bhutanese TV.

Figure 16: Languages used to access media
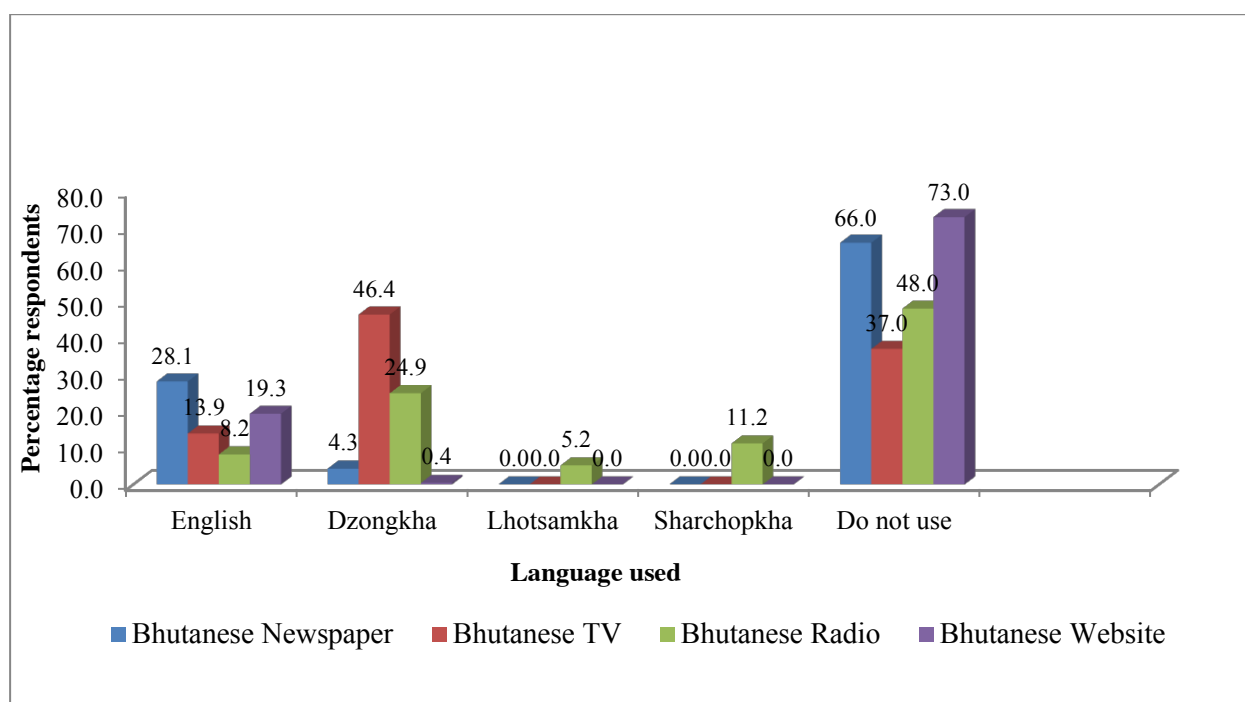
The figure above confirms that **there is a larger audience who listened to radio and/or watched TV in *Dzongkha* language while newspapers and websites were mostly read in English. Rural people make up a majority of the population who listened to radio and/or watched TV in *Dzongkha* whereas newspapers mostly catered to the urban, English-speaking population.**

A comparatively less number of the population listened to radio in *Sharchopkha* and *Lhotsamkha*.

CHAPTER 5: MEDIA CONTENT AND PREFERENCES

The study findings show that information and media content landscape has changed in the past five years, becoming more diverse and plural, and choice of media services has increased particularly newspapers, radio, internet and TV. The rapid penetration of mobile phones in the country has also contributed to availability of more diverse content and applications. Accordingly, peoples' preference for media, by either content or channel or both have changed over the years.

MBS 2012 found that media coverage was mostly urban-centric and lacked inclusion of views of all sections of the society. Although media like radio had wider reach and audience, yet the contents it delivered mostly reflected the issues and views of urban areas. The study thus recommended conducting media content analysis from time to time to evaluate the progress made on promoting local contents relevant to all sections of the society.

According to MDA 2010, most media depended on word-of-mouth feedback and comments posted on their websites and online forums on stories, content and quality of their services, and made responses as necessitated. People preferred to have media contents that were relevant to their situation. Specifically, people wanted the media to report on their development needs (i.e. health, education, water and sanitation, roads etc.). Thus, the study recommended that media organizations establish interactive feedback platforms to gauge public perceptions that could be bolstered by periodic studies on content preferences, trust and confidence. The study also recommended promoting entrepreneurship for innovative local content production including mobile content and applications.

BIMIS 2013 analysed the various kinds of media content available and preferred by people, and the type of media they turn to for purposes such as news, entertainment, information and education.

BIMIS 2013 shows a considerable increase in the number of people using media for news and other information apart from entertainment purposes with TV and radio as the main sources of news and other information in both urban and rural areas.

In contrast, BMIS 2008 findings showed that entertainment was the primary reason for media use with a large number of people becoming regular consumers of media, particularly entertainment media.

5.1   Content

Out of the 63% sample respondents in rural areas, 23% said Bhutanese TV represented people's views adequately, while out of the 37% sampled respondents in urban areas, 33% said Bhutanese TV represented people's views adequately.

Out of the total sample (both rural and urban areas), 56% said that Bhutanese TV adequately represented people's views.

This can be attributed to wider coverage and reach of Bhutanese TV and also increased number of people owning TV sets both in rural and urban areas. 79% of rural people owned one TV set while 68% of urban population owned one TV set.

According to BMIS 2008, a higher percentage of the rural and urban respondents (25.5% and a significantly higher 52.4% respectively) said Bhutanese TV represented people's views.

Table 4: Does Bhutanese TV adequately represent people's views?

	Yes	No	Don't Know	No Response	Total
Rural	23%	3%	34%	3%	63%
Urban	33%	2%	2%	-	37%
Total	56%	5%	36%	3%	100%

In terms of whether Bhutanese radio represented people's views adequately, out of the 63% sample respondents in rural areas, 35% said it did so, while out of the 37% sample respondents in urban areas, only 10% said Bhutanese radio represented people's views adequately.

Out of the total sample (both rural and urban areas), 45% said that Bhutanese radio adequately represented people's views.

In BMIS 2008, 43.3% of rural respondents said Bhutanese radio represented people's views against 33.3% of urban respondents who said Bhutanese radio represented people's views.

Table 5: Does Bhutanese radio adequately represent people's views?

	Yes	No	Don't Know	No Response	Total
Rural	35%	3%	22%	3%	63%
Urban	10%	2%	23%	2%	37%
Total	45%	5%	45%	5%	100%

When asked whether Bhutanese newspapers represented people's views adequately, out of the 63% sample rural residents, only 9% was affirmative. Out of the 37% sample urban respondents, 21% said Bhutanese newspapers represented people's views.

However, out of the total sample (both rural and urban areas), 31% said Bhutanese newspapers adequately represented people's views.

In BMIS 2008, 40.7% of urban respondents said Bhutanese newspapers represented people's views while 17.5% of rural respondents said Bhutanese newspapers represented people's views.

Table 6: Does Bhutanese newspapers adequately represent people's views?

	Yes	No	Don't Know	No Response	Total
Rural	9%	5%	46%	3%	63%
Urban	21%	1%	13%	2%	37%
Total	30%	6%	59%	5%	100%

The three tables above showed the differences among Bhutanese TV (56%), Bhutanese radio (45%) and Bhutanese newspapers (30%) in terms of which media adequately represented people's views by residence.

A large percentage of the respondents did not know if Bhutanese media adequately represented people's views. This could be because media content are generally urban-biased and did not adequately cover all segments of the society.

Compared to Bhutanese TV and radio, Bhutanese newspapers were seen as the least representative of people's views, based on the BMIS 2013 survey which covered a greater percentage of rural respondents. A possible reason could be that most Bhutanese newspapers are urban-centric in their coverage and their circulation is also restricted to major towns in the country.

Focus group discussions with chief executives of media houses, editors and journalists revealed that owing to sustainability and financial issues, except for a few newspapers, most of them have closed their regional correspondent offices and have been mainly operating from Thimphu and nearby urban towns. This has created hurdles for newspapers to continue rural based reporting and has therefore greatly reduced media coverage on issues pertaining to rural areas.

In light of the financial problems, newspapers have also resorted to cutting down cost through lay-offs in various departments including the editorial. Most newspapers have a very small and compact newsroom with multi-tasking reporters. The shortage of reporters has directly affected coverage of rural areas.

This has resulted in **limited diversity of media platforms and communication channels, especially in rural areas, preventing people from expressing views and participating in public discussions.**

5.2   Media Preferences

The survey collected data to get an indication of people's main sources of news and entertainment, their preferences by type of media, in both urban and rural areas.

Figure 20 shows that **BBS TV is the most preferred media (36%) followed by Bhutanese radio (25%) and then international TV (19%), showing that local media is better preferred over international media by Bhutanese people.**

Bhutanese newspapers and internet/online media are preferred more in urban areas than in rural areas, due to larger educated population base in urban areas. Bhutanese radio was the least preferred in urban areas, due to availability of various other types of media, particularly new media.

Table 7 indicates types of media preferred by different age groups. Bhutanese TV (36%) was the most preferred by all age groups followed by Bhutanese radio (25%), and international TV (19%). Only 6% of the respondents preferred Bhutanese newspapers followed by internet/online media (4%).

Bhutanese TV was preferred more by those in the age group 26-35 (12%) years followed by 18-25 years (10%) and 36-55 years (9%). Bhutanese radio was preferred more by people in the age group 26-35 years (8%) and 36-55 years (8%) followed by those in 18-25 years (5%).

Internet/online was more popular among people in the 18-25 years (1%), 26-35 years (2%) and 36-55 years (1%).

Table 7: Preference by media type and age

	Media preference by respondent's age					Total
	< 18 years	18 – 25 years	26 – 35 years	36 – 55 years	> 55 years	
Bhutanese Newspapers	1%	2%	2%	1%	-	6%
Bhutanese TV	2%	10%	12%	9%	3%	36%
Bhutanese Radio	1%	5%	8%	8%	3%	25%
International Newspapers	-	-	-	-	-	0%
International TV	1%	6%	7%	4%	1%	19%
International Radio	-	-	-	-	-	0%
Internet/online	-	1%	2%	1%	-	4%
Others	-	2%	2%	2%	1%	7%
No Response	-	1%	-	-	2%	3%
Total	5%	27%	33%	25%	10%	100%

Radio continues to be the main source of news in rural areas (27%), followed by TV (26%). In urban areas, TV remains the main source of news (30%). Only 1% of urban population mentioned radio as their source of news.

Besides various media, rural respondents indicated friends as a marginal source of news (5%) over newspapers and magazines (2%), while for urban respondents, 3% treated newspapers and magazines as a second source of news followed by internet/online media (2%).

Rural respondents continue to indicate personal contacts – friends, parents and local leaders (7%) – as their reliable sources of news. In contrast, urban respondents indicated friends only (1%) as their source of news. **This finding indicates a similar trend in 2008 as well where 7.4% of rural population still preferred friends as a source of news.**

Table 8: Source of news by residence

Source of news	Rural	Urban
Radio	27%	1%
TV	26%	30%
Internet/online	-	2%
Newspapers and magazines	2%	3%
Friends	5%	1%
Parents	1%	-
Local Leaders	1%	-
Others	1%	-
Total	63%	37%

TV is the most common source of entertainment in both rural and urban areas. A majority of 55% of survey respondents from urban (29%) and rural (26%) said they watched TV for entertainment purposes.

Radio is still a popular source of entertainment in rural areas (16%). Against this, only 1% of urban population surveyed used radio as a source of entertainment.

The survey findings show that **more rural population** (12%) **used mobile phones for entertainment than urban respondents** (2%). An equal percentage (1%) of urban and rural population considered music/drama (live shows) and sports events as other sources of entertainment.

Urban population did not consider Tshechus/Festivals/Fairs and videos as sources of entertainment while 2% of rural respondents said Tshechus/Festivals/Fairs were sources of entertainment for them followed by 4% who used video for entertainment.

Meanwhile, 2% of the urban population used online media as a source of entertainment followed by 1% who used books and magazines as sources of entertainment.

An interesting finding of BIMIS 2013 is that TV has taken over radio as the main source of entertainment in rural areas. BMIS 2008 showed that for **52.2% of rural respondents, radio was the main source entertainment and only 21.7% of them considered TV as the main source of entertainment.**

BIMIS 2013 indicates more number of rural population (26%) watch TV for entertainment purposes against 16% of them who tune in to radio for entertainment. The greater accessibility to TV and more rural people owning TV sets could perhaps explain this shift in the trend.

Table 9: Source of entertainment by residence

Source of entertainment	Rural	Urban
Radio	16%	1%
TV	26%	29%
Mobile Phones	12%	2%
Videos	4%	-
Sports Events	1%	1%
Cinema/Films	-	-
Music/Drama (Live Shows)	1%	1%
Books and Magazines	-	1%
Online Media	-	2%

Tshechus/Festivals/Fairs	2%	-
Others	1%	-
Total	63%	37%

People read a wide variety of print media. In terms of preference for the top three reading materials, people in urban areas preferred reading newspapers the most (59%), followed by books and novels (27%) and academic books (21%).

The top three reading materials for people in rural areas were newspapers (26%), books and novels (22%) and academic books (22%).

Figure 17: What people read by rural/urban
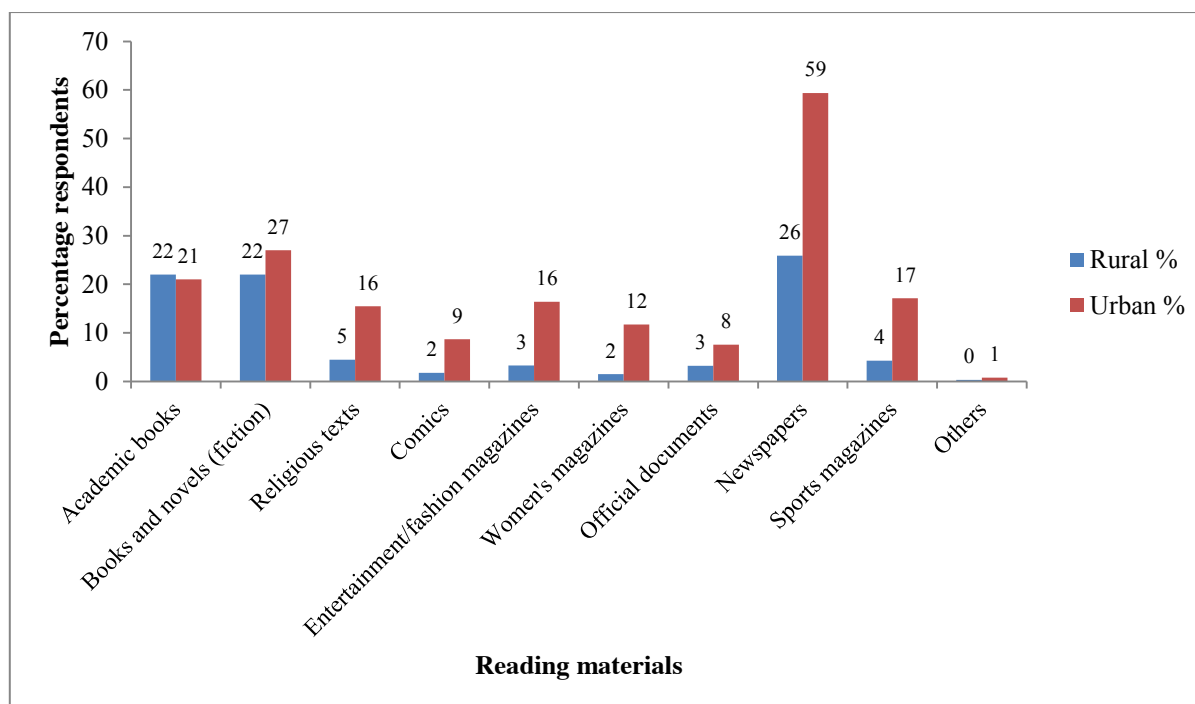
With regard to people's preferences for movies/films, there is a strong preference for Bhutanese films in both urban and rural areas, followed by Hindi and Western films.

Figure 18: Movies preferred by rural/urban
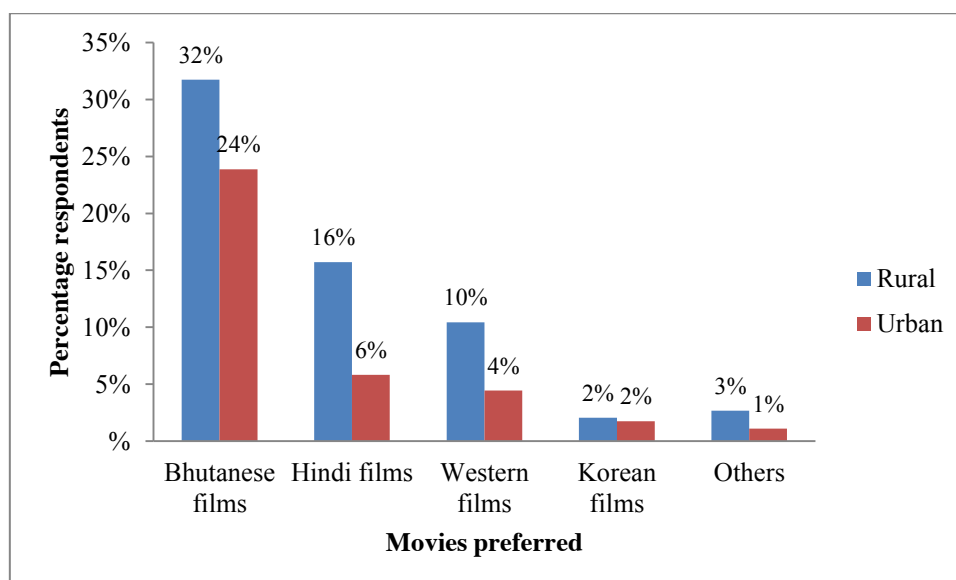
In terms of quality of Bhutanese movies/films, most people say that the quality of movies/films rated by various features – direction, acting, editing, cinematography and music – is good, in general.

Figure 19: Elements liked in Bhutanese movies
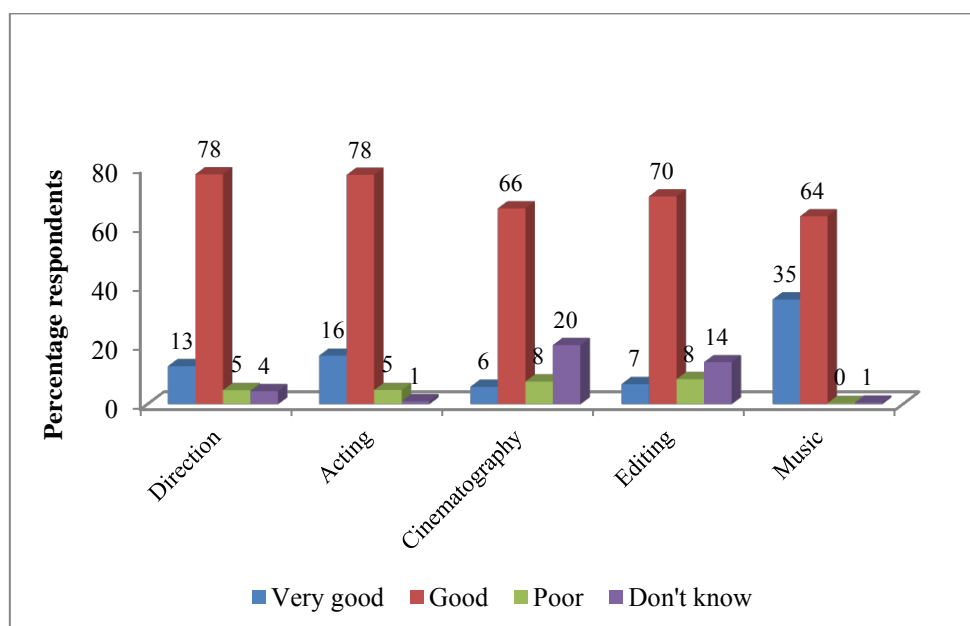
CHAPTER 6: CREDIBILITY OF MEDIA

BIMIS 2013 assessed the trustworthiness and credibility of the Bhutanese media, focusing on the news media. This was important to gauge the various media based on:

- Popularity,
- Believability,
- Balance of coverage, and
- Quality of service.

BIMIS 2013 findings show that there are concerns about financial issues causing media to compromise editorial independence for business interest. Public trust in the media has declined over the years. They view media content as inaccurate, lacking in-depth analysis. Media consumers also think some media are politicized and carry partisan views.

MBS 2012 pointed out that the lack of trained and experienced media professionals affected the professionalism and maturity of the Bhutanese media, which in turn contributed to the lack of trust and credibility of the media.

Interestingly, MDA 2010 deduced that the public displayed high levels of trust and confidence in the media. It also found that television was the most trusted source for accurate information followed by radio and newspapers.

BMIS 2008 showed that Bhutanese media enjoyed greater credibility than international media. Public trusted BBS TV more than the international TV channels. Households picked BBS radio as the most accurate. Among the newspapers, Kuensel was identified as the most trusted source of information.

6.1 Popularity

BBS TV is the most popular media (36%) followed by Bhutanese radio (25%) and then international TV (19%), showing that local media is more popular than the

international media. Bhutanese newspapers and internet/online media are more popular among the urban households than the rural lot.

Figure 20 shows popularity of various media by rural and urban households.

Figure 20: Media popularity by rural/urban
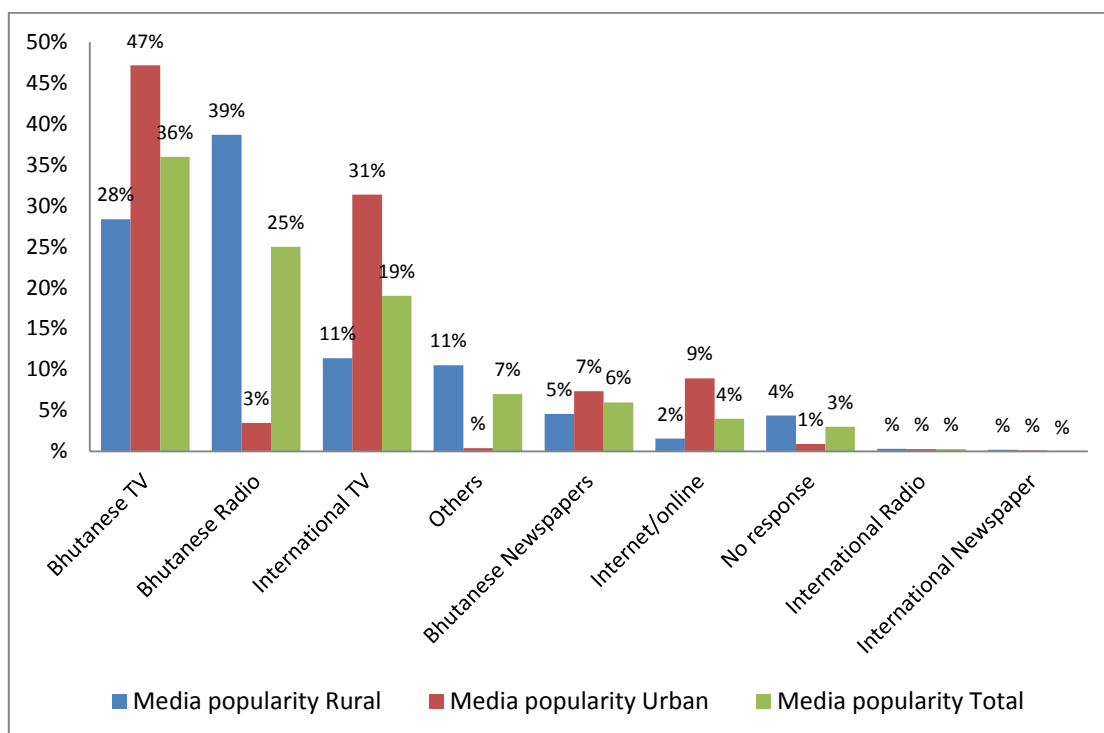
Among the various local media, public corporations, viz. BBS and Kuensel, remain the most popular among the Bhutanese audience. Kuzoo FM, Business Bhutan and Centennial Radio have also gained some popularity in the market.

Figure 21: Popularity of various media by news content

Figure: (chart of media believability)
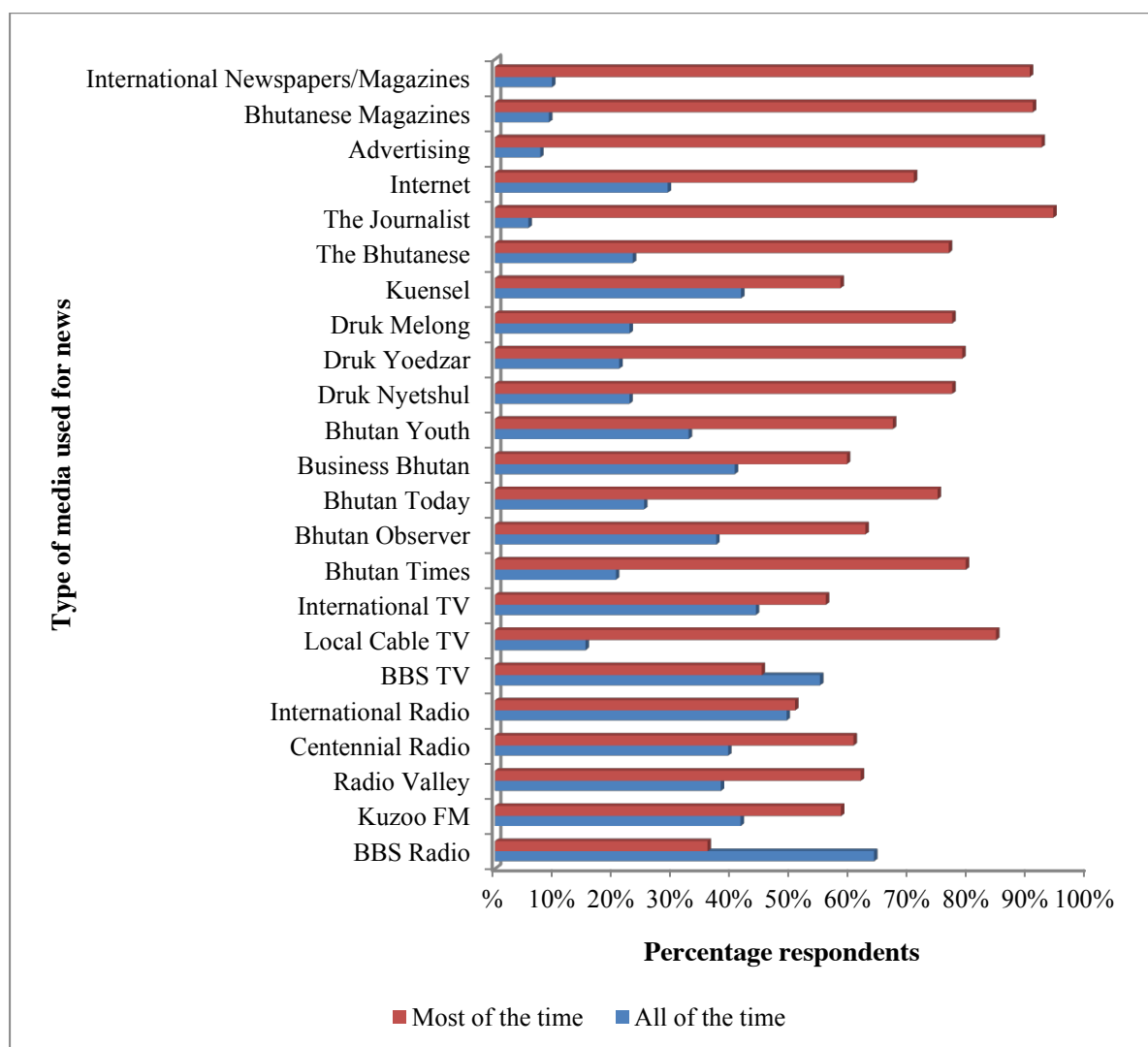
6.2   Believability

About two-third or 64% of the respondents felt that BBS radio content was believable all of the time followed by international radio (49%), Kuzoo FM (42%), Centennial Radio (39%) and Radio Valley (38%).

Figure 22: Believability of radio news content
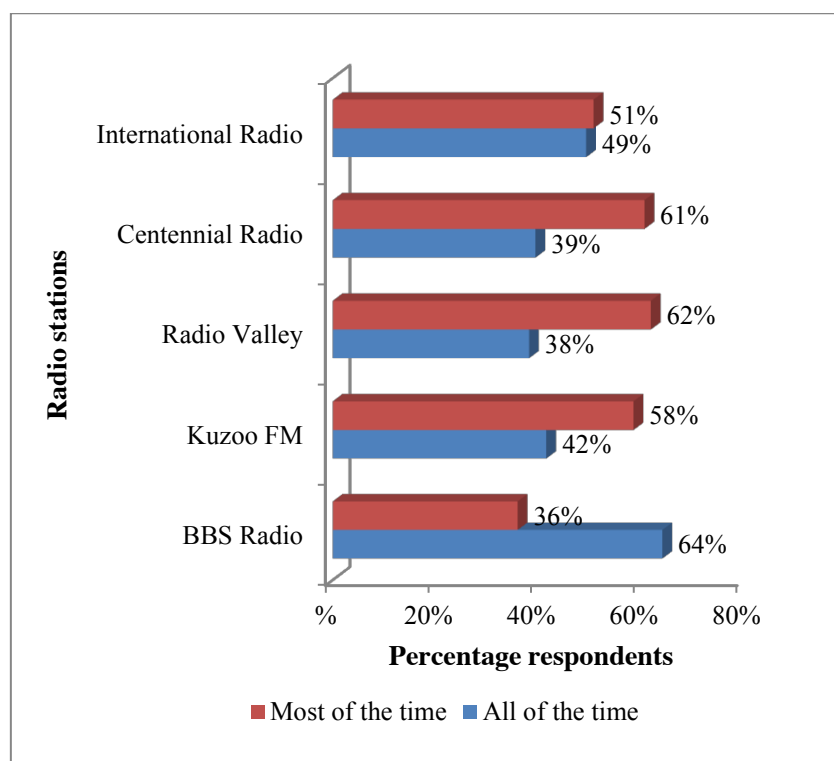
News content on BBS TV was trusted more than those on international TV.

55% of the respondents felt BBS TV news content was believable all the time compared to 44% who felt international TV news content was believable all the time.

Interestingly, only 15% of the respondents felt local cable TV news content was believable all the time whereas 85% felt that it was believable most of the time.

Figure 23: Believability/credibility of TV news content
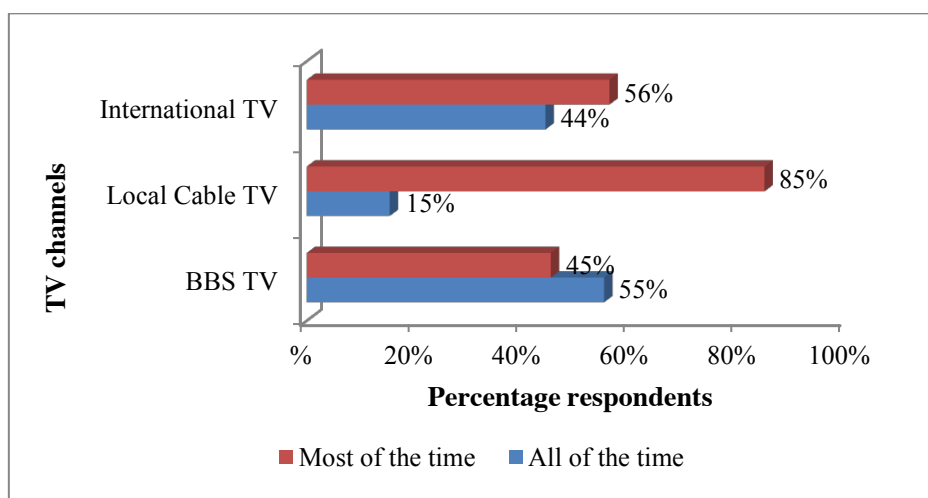
With regard to newspaper content, 42% of the respondents felt that news content in Kuensel was believable all the time, followed by Business Bhutan (41%), Bhutan Observer (37%), Bhutan Youth (33%) and Bhutan Today (25%).

23% of the respondents felt that news content in The Bhutanese, Druk Nyetshul and Druk Melong were believable all the time while only 20% of the respondents felt that news content in Bhutan Times were believable all of the time.

Figure 24: Believability/credibility of newspaper news content
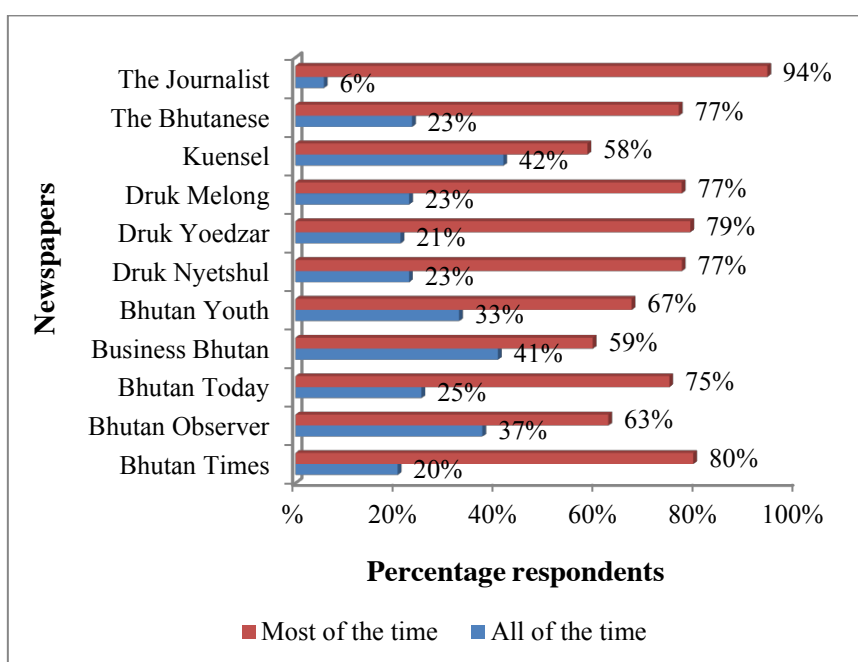
With regard to news content in other media, only 29% of the respondents said that news content in the internet was believable all the time, followed by those in international newspapers and/or magazines (10%), Bhutanese magazines (9%), and advertising (8%).

Figure 25: Believability/credibility of news content in other media
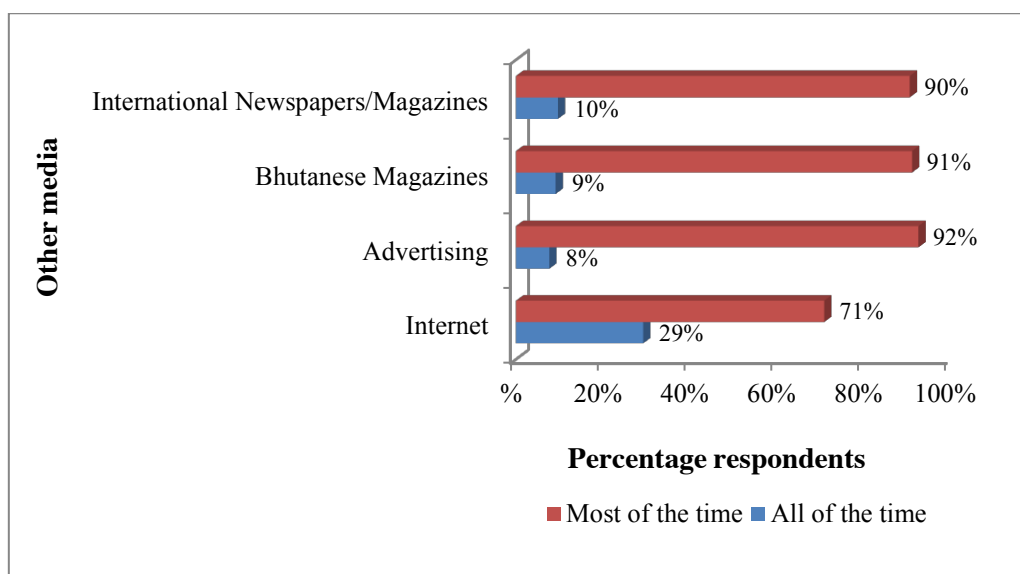
9% of rural and 5% of urban respondents believed information on government websites were credible all of the time, while 8% of rural and 14% of urban respondents believed information on government websites were credible most of the time.

Respondents also said contents on newspaper websites were credible most of the time (7% rural and 21% urban). Some respondents felt content on weblogs were credible most of the time (6% rural and 7% urban).

Table 10: Believability/credibility of information on internet sites by rural/urban (%)

		Radio sites - local	Radio sites - international	Blogs	Government / Ministry	Newspaper site - local
Rural	All of the time	-	-	2%	9%	7%
	Most of the time	-	-	6%	8%	7%
	Some of the time	-	-	3%	6%	7%
	Very little of the time	-	-	1%	-	-
	None of the time	-	-	-	-	-
	No response	100%	100%	88%	77%	79%
Urban	All of the time	-	-	-	5%	2%
	Most of the time	-	1%	7%	14%	21%
	Some of the time	-	-	6%	3%	5%
	Very little of the time	-	-	-	-	-

None of the time	-	-	-	-	-
No response	100%	99%	87%	78%	72%

6.3   Balance of coverage

Focus group participants and media experts acknowledged increasing coverage of rural issues by media post the country's transition to democracy in 2008. However, they still feel that most media coverage is urban-centric and hence not well-balanced in terms of rural coverage.

Rural people still feel that media could and should do more to cover rural and community stories and news, as decentralization at the grassroots is becoming a reality and gaining momentum. **Some survey respondents suggested that the government provide incentives to media houses to enable them to expand their coverage on rural issues and include views of all segments of the society, so as to deliver balanced content to the public.**

Qualitative study participants also lamented the lack of proper research and in-depth analysis in print media, in particular. Many stories, they believe, are based on limited reliable information sources and lack good investigation. People want more investigative journalism and a professional media fraternity.

In terms of coverage of development topics, BIMIS 2013 household survey found that media did a fairly good coverage of all the four pillars of GNH – culture was the most covered topic followed by social issues, politics and governance, environmental issues, and sustainable economic development.

3.1% of the survey respondents noted Bhutanese media content included other topics outside the GNH domain.

Figure 26: Development topics covered in the media
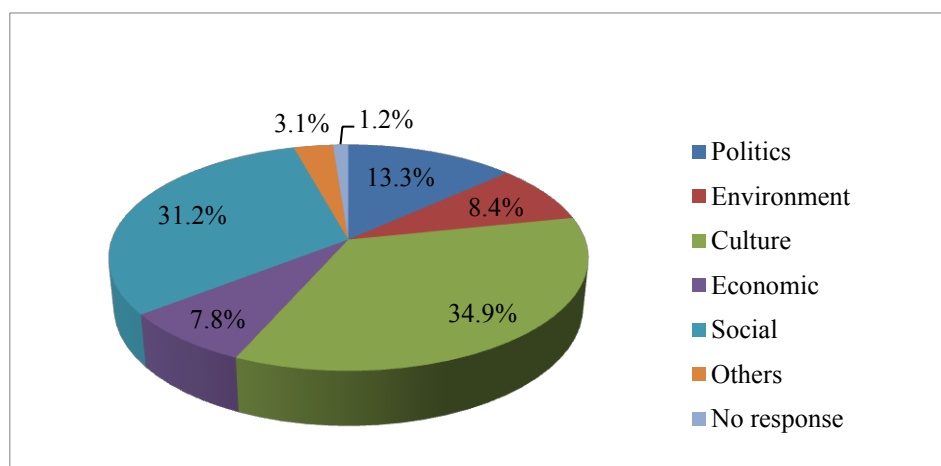
6.4 Quality of service

Based on the analysis of the quantitative survey data and qualitative study undertaken under BIMIS 2013, people are generally satisfied with the quality of service in Bhutanese media. In fact, local media has been found to be more popular than international media. Many respondents are happy with the quality of BBS TV and radio services despite the absence of competition in the TV market. Kuensel continues to be rated higher in terms of quality of its newspaper service and circulation figures.

However, some stakeholders strongly expressed that licensing a second TV company would enhance diversity and pluralism of audio-visual content and boost local content development.

MBS 2012 noted that there is a limited pool of trained journalists and media professionals in the country which affected the quality of journalism and professional functioning of the media houses. This has resulted in recurring operational challenges and issues such as ethical breaches, commercial pressures, poor quality reporting, poor business management, etc. Untrained journalists are not able to approach news stories in a manner editors would want them to, and in the process, quality suffers. Poor reporting results in poor stories and adversely impacts the overall quality of media content.

MBS 2012 also brought out the issue of growing plagiarism among Bhutanese journalists which has dire impacts on quality of service and professionalism in the media industry. It also noted that the proliferation of media outlets largely influenced by the lucrative advertisement

revenues has affected the quality and accountability of the way media functions which has posed serious policy and regulatory challenges for the government and the regulator.

MDA 2010 recapitulates the fact that newspaper distribution is not easy in a mountainous country like Bhutan. Most newspapers print in Thimphu and circulate the copies through public transport and courier services. This impacts the timely delivery of media services in far-flung and rural areas of Bhutan. Some newspapers have overcome these challenges by using the Internet to distribute their newspaper content in PDF format to their registered subscribers in various parts of the country.

In light of the challenges posed to the Bhutanese media industry by an onslaught of foreign media content, MDA 2010 recommended supporting and encouraging the production of quality original local content for various communities in the country. It also suggested the setting up a media development fund with public contributions for developing quality local content.

CHAPTER 7: COMMERCIALISM AND MEDIA

MDA 2010 and MBS 2012 pointed that a large number of private newspapers in Bhutan are faced with sustainability issues. Concerns have been expressed about financial issues causing newspapers to compromise their editorial independence for business interest. The proliferation of media outlets, largely influenced by lucrative advertisement revenue, has also affected quality and accountability of the way media operates.

A free and independent media is viewed not only as vital for furthering democracy but also imperative in ensuring institutional accountability and transparency. In contrast, commercial inclinations of media mainly motivated by profit could prove harmful in the early stages of media development in Bhutan.

Advertising is a necessary reality but it is also a very powerful force that must be carefully monitored, so that commercial values do not override the importance of public service and civic duty of the media outlets.

As in many countries around the world, **advertising-based media is still the dominant form of business model for Bhutanese media. Without advertising income, the price of media would increase considerably, pushing the media beyond the reach of many Bhutanese.**

Focus group discussions with media professionals that included journalists, editors and chief executive officers noted that since government is the biggest advertiser, there was a need to have policy instruments in place for fair distribution of government advertising. Although MoIC has developed the Government Advertising Guidelines, strict compliance and implementation of these guidelines would be a necessary action step.

MBS 2012 noted that the distribution of government advertisements are still conducted in a haphazard manner – based on personal relationship, coercion, offering cuts and false media statistics.

7.1   Expenditure on information and media consumption

Bhutanese people are spending more on mobile telephony than any other information and media services in both urban and rural areas. This trend was also observed by BMIS 2008 where urban households spent more on mobile phones in the bracket of Nu 301 – 600 a month.

In rural areas, the most significant spending was on mobile telephony than any other media. 36% of the households spent between Nu 301 – 600 every month, 23% spent between Nu 601 – 1,000, 21% spent between Nu 101 – 300, 10% spent between Nu 1,001 – 2,000, 6% of the households spent less than Nu 100, and 4% spent more than Nu 2,000 a month.

For those with internet access, 95% of the households spent less than Nu 100 every month, 2% spent between Nu 101 – 300, 2% spent between Nu 301 – 600 and 1% spent between Nu 601 – 1,000 a month.

About two-third (68%) of the households spent less than Nu 100 on TV every month, 24% spent between Nu 101 – 300, and 8% spent between Nu 301 – 600 a month.

On video, 85% of the households spent less than Nu 100 every month, 7% spent between Nu 101 – 300, 7% spent between Nu 301 – 600 and 1% spent between Nu 601 – 1,000 a month.

On audio, 99% of the households spent less than Nu 100 every month and 1% spent between Nu 101 – 300 a month.

On films, 91% of the households spent less than Nu 100 every month, 6% spent between Nu 101 – 300, 2% spent between Nu 301 – 600 and 1% spent between Nu 601 – 1,000 a month.

On newspapers, 97% of the households spent less than Nu 100 every month and 3% spent between Nu 101 – 300 a month.

On books and magazines, 94% of the households spent less than Nu 100 every month, 4% spent between Nu 101 – 300, and 2% spent between Nu 301 – 600 a month.

Figure 27: Monthly household expenditure on media in rural areas
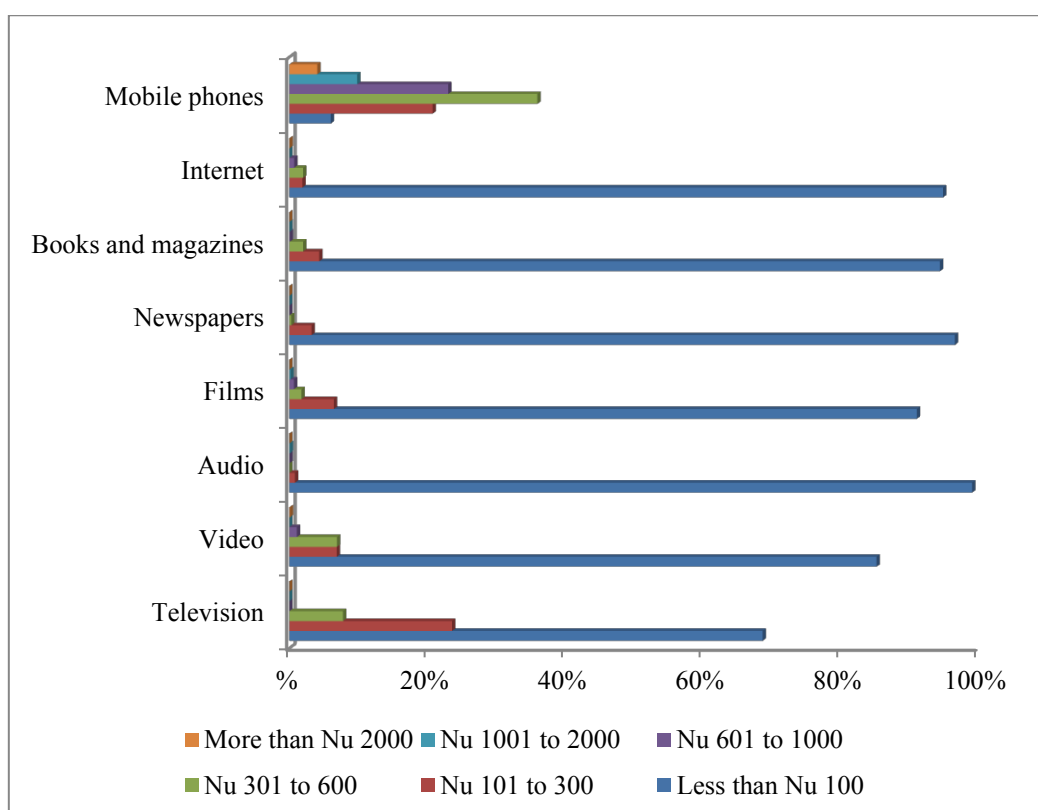
Similarly, in urban areas, the most significant spending was on mobile telephony than any other media. 29% of the households spent between Nu 301 – 600 every month, 29% spent between Nu 601 – 1,000, 19% spent between Nu 1,001 – 2,000, 11% spent between Nu 101 – 300, 9% spent more than Nu 2,000 and 4% spent less than Nu 100 a month.

For those with internet access, 60% of the households spent less than Nu 100 every month, 9% spent between Nu 101 – 300, 20% spent between Nu 301 – 600, 8% spent between Nu 601 – 1,000, 2% spent between Nu 1,001 – 2,000, and 1% spent more than Nu 2,000 a month.

On TV, 8% of the households spent less than Nu 100 every month, 88% spent between Nu 101 – 300, and 4% spent between Nu 301 – 600 a month.

On video, 87% of the households spent less than Nu 100 every month, 6% spent between Nu 101 – 300, 5% spent between Nu 301 – 600 and 2% spent between Nu 601 – 1,000 a month.

On audio, 95% of the households spent less than Nu 100 every month, 3% spent between Nu 101 – 300, 1% spent between Nu 301 – 600, and 1% spent between Nu 601 – 1,000 a month.

On films, 68% of the households spent less than Nu 100 every month, 12% spent between Nu 101 – 300, 12% spent between Nu 301 – 600, 7% spent between Nu 601 – 1,000, and 1% spent between Nu 1,001 – 2,000 a month.

On newspapers, 72% of the households spent less than Nu 100 every month, 25% spent between Nu 101 – 300, and 3% spent between Nu 301 – 600 a month.

On books and magazines, 69% of the households spent less than Nu 100 every month, 17% spent between Nu 101 – 300, 11% spent between Nu 301 – 600, 2% spent between Nu 601 – 1,000, and 1% spent between Nu 1,001 – 2,000 a month.

Figure 28: Monthly household expenditure on media in urban areas
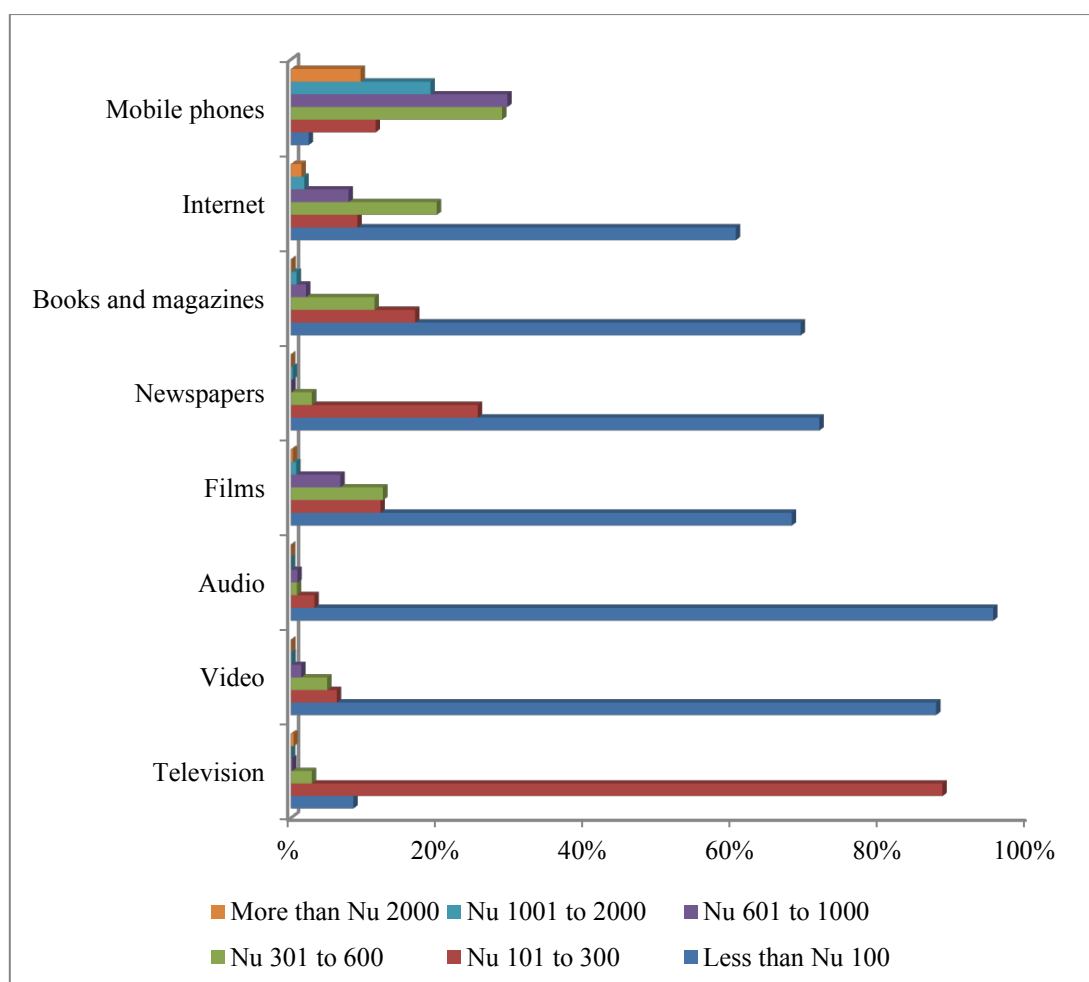
It can be deduced from Figures 27 and 28 above that **urban households spent more overall, and in particular on mobile telephony, followed by spending on internet, books and magazines, newspapers and films.**

Increased spending on mobile telephony by rural people can be attributed to the improved mobile network coverage in rural areas. The government's efforts to provide 100% universal mobile network coverage by 2013 has also enhanced mobile connectivity and access to mobile telephony in areas that otherwise did not have network coverage.

The private mobile telephone company, Tashi InfoComm Limited, has also expanded its network coverage in all 20 dzongkhags over the years, further increasing access to mobile services and offering more choice to the people.

7.2 Advertising in media

People paid attention to advertising in media although advertisements are not the main reason driving media use (see Table 11 through Table 17).

Advertising in Bhutanese media attracted more attention of people than those in international media; for instance, advertising on BBS TV was viewed more than those on foreign TV channels, which is a good trend and indicates a healthier non-consumerist society.

Public procurement notices and other public announcements and/or notifications dominated the advertising market in Bhutan. **Advertising by the private sector and consumers still remain very insignificant, which shows that professional branding, marketing and advertising are not yet accorded a priority by Bhutanese business houses.**

Both urban and rural respondents paid a great deal of attention to newspaper advertisements. Urban people paid some attention to advertising both on radio and TV while rural people paid some attention to advertising on radio only.

While listening to radio, 10% of urban respondents paid some attention to advertisements, 5% paid a great deal of attention and 2% paid a little attention to advertisements. Among the rural respondents, 2% paid some attention while 1% paid a great deal of attention to radio advertisements.

Table 11: Attention paid to radio advertisement by rural/urban

Attention paid to radio advertisement	Rural	Urban
A great deal	1%	5%
Some	2%	10%
A little	-	2%
None	-	-
Not applicable	97%	83%
Total	100%	100%

When watching TV, 1% of the rural respondents said they paid attention to advertisement a little while 3% of urban respondents paid a great deal of attention followed by 2% who paid some attention to advertisements.

Table 12: Attention paid to TV advertisement by rural/urban

Attention paid to TV advertisement	Rural	Urban
A great deal	-	3%
Some	-	2%
A little	1%	-
None	-	-
Not applicable	99%	95%
Total	100%	100%

In contrast, 17% of rural respondents paid a great deal of attention while reading newspapers followed by 9% who paid a little attention and 2% paid some attention. Among the urban respondents, 14% paid a great deal of attention to newspaper advertisements followed by 10% who paid a little attention and 9% who paid some attention to newspaper advertisements.

Table 13: Attention paid to newspaper advertisement by rural/urban

Attention paid to newspaper advertisement	Rural	Urban
A great deal	17%	14%
Some	2%	9%
A little	9%	10%
None	-	-

Not applicable	72%	67%
Total	100%	100%

When listening to programmes on radio, more urban respondents (8%) preferred to listen to BBS radio advertisements compared to only 2% of the rural respondents. 6% of the urban respondents also preferred to listen to advertisements on Kuzoo FM as against 1% of the rural respondents. Radio Valley was available only in Thimphu, so 2% of the urban respondents preferred to listen to advertisements aired by it.

Table 14: Preferred radio station for advertisements by rural/urban

Radio station for advertisement	Rural	Urban
BBS radio	2%	8%
Kuzoo FM	1%	6%
Radio Valley	-	2%
International radio	-	1%
Not applicable	97%	83%
Total	100%	100%

For advertisements on TV, 2% of urban respondents preferred BBS TV1, 1% preferred BBS TV2 and 2% preferred international TV. Among rural respondents, 1% preferred BBS TV1 for advertisements while 99% said the question was not applicable.

Table 15: Preferred TV station for advertisements by rural/urban

TV station for advertisement	Rural	Urban
BBS TV1	1%	2%
BBS TV2	-	1%
International TV	-	2%
Not applicable	99%	95%
Total	100%	100%

Among newspapers, a majority of both urban and rural respondents preferred Kuensel for advertisements followed by Bhutan Observer, Bhutan Times and Bhutan Today. 26% of urban respondents and 24% of rural respondents preferred Kuensel for advertisements

while 4% urban respondents and 1% rural respondents preferred Bhutan Observer. Bhutan Times was marginally preferred by rural respondents (2%) compared to urban respondents (1%). Both urban and rural respondents (1% each) preferred advertisements in Bhutan Today while only 1% of urban respondents preferred advertisements in The Bhutanese.

Table 16: Preferred newspapers for advertising by rural/urban

Newspaper for advertising	Rural	Urban
Bhutan Observer	1%	4%
Bhutan Times	2%	1%
Bhutan Today	1%	1%
Kuensel	24%	26%
The Bhutanese	-	1%
Not applicable	72%	67%
Total	100%	100%

Table 17 indicates the influence of advertising on consumers' behavior and how often advertising in media results in their purchase and/or use of products and services.

Table 17: Advertising influence by media

How often does advertising on the following media make you want to buy/use products and services?	No response	All the time	Often	Sometimes	Never	Don't listen / view / read
BBS Radio	58%	2%	5%	10%	23%	2%
Kuzoo FM	88%	1%	2%	2%	5%	1%
Radio Valley	98%	-	-	-	-	1%
Centennial Radio	98%	-	-	-	-	1%
Radio Waves	99%	-	-	-	-	1%
Radio High	99%	-	-	-	-	1%
International Radio	98%	-	-	-	-	1%
BBS TV	42%	4%	8%	21%	23%	2%
Bhutan Times	94%	-	1%	2%	1%	1%
Bhutan Observer	95%	-	1%	2%	2%	1%
Bhutan Today	97%	-	-	1%	1%	1%
Business Bhutan	98%	-	-	-	-	1%
Bhutan Youth	98%	-	-	-	-	1%
Druk Nyetshul	98%	-	-	-	-	1%
Druk Yoedzar	98%	-	-	-	-	1%
Druk Melong	98%	-	-	-	-	1%
Gyalchi Sharshog	99%	-	-	-	-	1%

Kuensel	75%	1%	4%	11%	7%	1%
The Bhutanese	98%	-	-	1%	-	1%
The Journalist	98%	-	-	-	-	1%
Local cable TV	90%	%	2%	5%	1%	1%
International TV	75%	1%	5%	11%	8%	2%
Internet	83%	1%	3%	7%	5%	2%
Advertising	97%	-	1%	1%	-	1%
Bhutanese magazines	97%	-	-	1%	-	1%
International newspapers / magazines	98%	-	-	-	-	1%

Only 4% of the respondents said advertisements on BBS TV influenced them to buy/use products and services all the time, followed by 2% who said advertisements on BBS Radio made them buy/use products and services all the time. More respondents (8%) said BBS TV influenced them to buy/use products and services often, followed by BBS Radio (5%) and international TV (5%) while 4% said Kuensel advertisements influenced them to buy often.

A majority of the respondents said advertisements in various media influenced their consumerist behavior sometimes only while a significant portion of the respondents also said advertisements in media never influenced them to buy/use products and services.

CHAPTER 8: INFLUENCE OF MEDIA

The influence of information and media on Bhutanese society continues to grow and evolve as a result of the rapid changes in socio-economic and political scenarios. The introduction of various media was a vital part of Bhutan's transition to democracy. The realization of their democratic rights to free speech combined with the access to media platforms has encouraged Bhutanese people to shed traditional inhibitions and express their views more freely.

The arrival of social media has further broadened this possibility, particularly for those Bhutanese with access to the internet. Increasing numbers of Bhutanese are now active users of various social media sites, engaging in information sharing, networking, and discussions on socio-political issues. For instance, a political party used social media to reach to potential candidates studying abroad and was successful in attracting a few to join the party.

Both social and mainstream media continue to play an important role in shaping public opinions, society's consciousness and thinking, and the cultural environment they live in. At the same time, there is a growing concern about the adverse effects of media on youth, social behaviour, fashion, and cultural ethics, among others.

Exposure to unregulated media content, many focus group participants felt, have resulted in our youth mimicking western culture and have led to increase in the number of gang fights, drug addiction, and violations of social and traditional norms.

BMIS 2008 findings showed that TV had spurred the process of globalization and was accelerating the adoption of new ideas. The increased penetration of TV and other media in rural areas is only expected to have a profound impact on local culture and traditions. Therefore, a strong need is felt for broad-based media literacy programmes to educate the people on the pros and cons of vast media content now easily available at our disposal.

BIMIS 2013 findings show that more Bhutanese now have access to different forms of information and media than ever before. While evolving its role in a GNH nation, these media are influencing people, making them better informed and educated and keeping them more engaged.

This section analyses the influences of media on the four pillars of GNH, viz. culture, socio-economic development, good governance, and environment, and corresponding impacts on the Bhutanese society and the economy at large.

8.1   Cultural change

Media has far-reaching impacts on people's beliefs, attitudes, and behaviour and more often shapes values and cultures. Findings show that the impact of the enhanced access to information and media content on the Bhutanese culture is profound.

BMIS 2008 indicated that media has helped in accelerating a new culture by introducing ideas of the modern and generally urban world. It also however showed that there was a visible shift in the preference for local content that reinforced Bhutanese culture mainly fuelled by more Bhutanese media and content.

BIMIS 2013 asked survey respondents if what they saw/heard/read in media influenced their talking/language, dressing, behaviour and thinking/attitude. **In general, audio visual media (TV) had the most influence on people's language, dress, behaviour and thinking/attitude.**

The survey indicated that media have some influence on people's language. Bhutanese TV had the widest influence on people's way of talking (59%), followed by:
- Bhutanese radio (49%),
- Indian TV (45%),
- Other foreign TV (38%), and
- Bhutanese newspapers (25%)

Survey findings noted that internet/online media currently has the least influence on language (20%).

BIMIS 2013 also shows that Bhutanese media have greater influence on people's language/talking compared to foreign media. 43% of urban respondents and 15.8% rural respondents said Bhutanese TV influenced their talking/language against 33% urban respondents and 11.3% respondents who said Indian TV influenced their language. Only

25.5% urban respondents and 9.6% rural respondents said other foreign TV influenced their language. This is similar to the findings of BMIS 2008.

Table 18: Does what you see/hear/read in media influence your talking/language?

	Bhutanese Radio	Bhutanese TV	Indian TV	Other Foreign TV	Bhutanese Newspapers	Internet / Online
Yes	49%	59%	45%	38%	25%	20%
No	5%	7%	9%	7%	8%	7%
Don't know	2%	2%	3%	5%	6%	4%
Don't use	38%	24%	29%	32%	45%	50%
No response	15%	8%	14%	18%	16%	19%
Total	100%	100%	100%	100%	100%	100%

Of all the media, visual media had the most influence on people's dressing. Bhutanese TV had the widest influence (45%), followed by Indian TV (34%) and other foreign TV channels (33%). Bhutanese newspapers had the least influence on people's dressing (11%).

According to the BMIS 2008, more respondents (33.8%) said Bhutanese TV influenced their dressing compared with Indian TV (27.5%) and Other Foreign TV (20.3%). Comparatively there were more respondents (37.4%) who felt Bhutanese radio influenced their dressing.

Table 19: Does what you see/hear/read in media influence your dressing?

	Bhutanese Radio	Bhutanese TV	Indian TV	Other Foreign TV	Bhutanese Newspapers	Internet / Online
Yes	18%	45%	34%	33%	11%	15%
No	24%	19%	19%	12%	19%	11%
Don't know	5%	3%	4%	5%	8%	4%
Don't use	35%	20%	25%	27%	40%	45%

No response	18%	13%	18%	23%	22%	25%
Total	100%	100%	100%	100%	100%	100%

Similarly, **visual media had the most influence on people's behaviour. Bhutanese TV had the widest influence (49%), followed by Indian TV (34%) and other foreign TV channels (31%). Bhutanese newspapers had the least influence on people's behaviour (14%).**

In 2008, 34.7% of respondents said Bhutanese TV influenced their behaviour followed by Indian TV (27.2%) and other Foreign TV (21.1%). A significant number of respondents (40%) said Bhutanese radio influenced their behaviour in 2008.

BIMIS 2013 found that 26% of rural respondents said Bhutanese radio influenced their behaviour. This comparative decrease in the influence of radio can be attributed to the enhanced penetration of Bhutanese TV in rural areas.

Table 20: Does what you see/hear/read in media influence your behaviour?

	Bhutanese Radio	Bhutanese TV	Indian TV	Other Foreign TV	Bhutanese Newspapers	Internet / Online
Yes	26%	49%	34%	31%	14%	15%
No	15%	15%	18%	13%	16%	10%
Don't know	6%	4%	5%	6%	9%	5%
Don't use	34%	20%	25%	27%	40%	45%
No response	19%	12%	18%	23%	21%	25%
Total	100%	100%	100%	100%	100%	100%

Again, **visual media had the most influence on people's thinking/attitude. Bhutanese TV had the widest influence (57%), followed by Indian TV (41%), Bhutanese radio (38%) and other foreign TV channels (35%). Internet/online media had the least influence on people's thinking/attitude (22%).**

BMIS 2008 showed that Bhutanese TV (48.1%) had greater influence on people's thinking/attitude compared with Indian TV (35%) and Other Foreign TV (28.5%). A significant number of respondents (55.8%) said Bhutanese radio influenced their thinking and attitude.

Table 21: Does what you see/hear/read in media influence your thinking/attitude?

	Bhutanese Radio	**Bhutanese TV**	**Indian TV**	**Other Foreign TV**	**Bhutanese Newspapers**	**Internet / Online**
Yes	38%	57%	41%	35%	24%	22%
No	6%	7%	12%	9%	8%	5%
Don't know	4%	3%	4%	6%	7%	3%
Don't use	34%	20%	25%	27%	40%	45%
No response	18%	13%	18%	23%	21%	25%
Total	100%	100%	100%	100%	100%	100%

Survey respondents viewed Bhutanese culture the most on TV (50%) followed by Indian culture (22%) and western culture (20%). Korean culture was viewed the least on TV (4%).

This could be due to the fact that Bhutanese youth follow Korean pop culture through films (DVDs/CDs), music channels, and video sites like YouTube and not necessarily through Korean TV channels that provide limited entertainment programs.

BIMIS 2013 found out that Bhutanese TV apparently has the biggest influence on people's language, dress, thinking and behaviour. This was also reflected in BMIS 2008 where 35.7% of the respondents were of the view that traditional Bhutanese culture was visible on TV. With BBS launching its second channel, it has created more local TV content for viewers and perhaps this is why more Bhutanese tend to be influenced by Bhutanese TV.

In recent years, Bhutanese film and music industry have also been successful in replacing Bollywood and Hollywood cinemas. This has had a big influence in reinforcing Bhutanese culture. However, it is observed that even Bhutanese films – mostly influenced by Bollywood movies – must evolve on its own, and find its own narrative.

Although Bhutanese TV and radio have greater influence on the people, the influence of foreign media cannot be ignored. Focus group participants expressed that influence of foreign media had several adverse effects on youth and was leading to the depletion of cultural values. They said youth these days appear to prefer western culture than national tradition and culture because of the exposure to foreign media content.

Some of the focus group participants also attributed the increase in gang fights, cases of drug addiction, and violation of cultural norms, among others, to youths trying to mimic behaviour expressed by TV programmes as western culture.

Figure 29: Culture viewed on TV by rural/urban
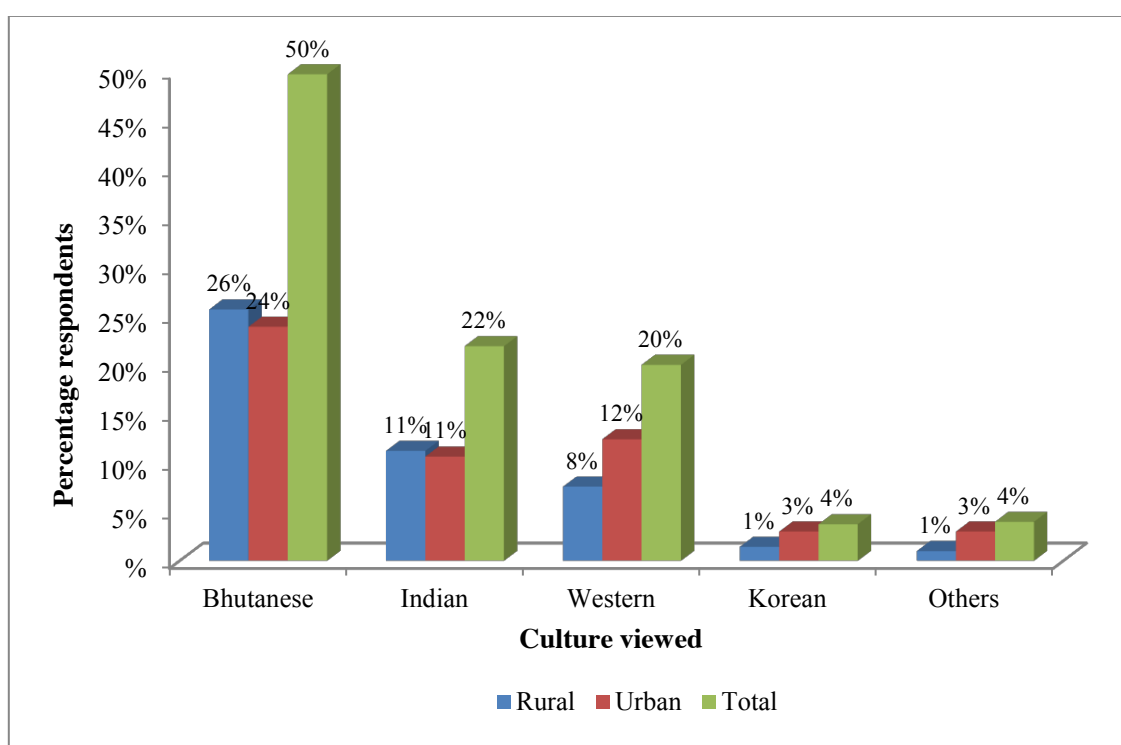
8.2　Socio-economic development

The household survey collected data to assess the influence of media on social change and economic development in Bhutan over the years.

(a)   *Social change*

The survey asked respondents how watching TV affected their daily lives. **A majority of respondents said TV viewing did not affect their work, prayer, and socializing and did not make them stay longer nights.**

Only 29% of respondents said that watching Bhutanese TV resulted in less time for work compared with 32% for Indian TV and 27% for other foreign TV.

On how TV viewing affected time for prayers and/or offerings, 77% of the respondents watching Bhutanese TV, 68% viewing Indian TV and 64% viewing other foreign TV channels said these did not affect their time for prayers and/or offerings.

9% of the respondents said watching Indian TV affected their time for prayers and/or offerings, compared with 22% for other foreign TV and 10% for Bhutanese TV.

BMIS 2008 also indicated that TV viewing did not materially affect people's time for prayers and offerings.

Table 22: Effect of TV on work, prayers, socializing and longer nights

	Bhutanese TV				**Indian TV**				**Other Foreign TV**			
	Yes	No	Don't know	No response	Yes	No	Don't know	No response	Yes	No	Don't know	No response
Have less time for work	29%	59%	3%	9%	32%	46%	6%	17%	27%	45%	7%	21%
Have less time for prayer and/or offering	10%	77%	2%	10%	9%	68%	5%	18%	8%	64%	7%	21%
Have less time for friends and/or socializing	20%	67%	3%	10%	22%	56%	5%	18%	20%	52%	7%	21%

Stay late at night	19%	69%	2%	10%	37%	41%	4%	18%	34%	38%	6%	22%

The pattern was similar on how TV viewing affected time for friends and/or socializing. **67% of the respondents said that watching Bhutanese TV did not affect their time for friends/socializing followed by 56% for Indian TV and 52% for other foreign TV.**

In contrast, 20% of the respondents said watching Bhutanese TV affected their time for friends/socializing followed by 22% watching Indian TV and 20% watching other foreign channels.

Comparatively, more respondents stayed longer nights watching TV. Against 38% who did not stay late at night watching other foreign TV, 34% stayed late. Similarly, 37% of respondents stayed late watching Indian TV while 41% said they did not stay late.

However, 69% of respondents said they did not stay late at night watching Bhutanese TV as against 19% who stayed late.

Thus overall, notwithstanding activities such as watching TV, the Bhutanese still accorded priority to and reserved adequate time for prayers.

Ever since it was formally introduced in 1999, TV has become a necessary part and parcel of every family and household, widely used as a source of news and entertainment. Even as more people watch Bhutanese TV spurred by an increase in local content, there is a continued demand for quality programmes in Bhutanese TV.

Focus group participants and interviewees said that to offset the strong influence of foreign media content, we must encourage Bhutanese TV broadcaster(s) to develop more diverse and quality programmes. Some said the second channel started by BBS (BBS TV2), which is largely entertainment-based should focus on educational programmes as well.

Many focus group participants and interviewees felt it is timely for the introduction of competition in the Bhutanese TV market, to provide more diverse and plural content to the public, promote wider public discourses and debates, and put BBS 'on toes' in terms of quality of service, balanced coverage and professionalism!

Table 23: Time children spent viewing TV per day by rural/urban

Residence	Time children spent viewing TV per day				Total
	< 1 hour	1 to 3 hours	> 3 < 5 hours	> 5 hours	
Rural	19%	22%	7%	4%	51%
Urban	21%	19%	6%	3%	49%
Total	39%	41%	14%	6%	100%

TV viewing was common among children, almost equally in both urban and rural areas. Children in 39% of the sampled households watched TV less than an hour a day, 41% watched between 1 to 3 hours, 14% watched between 3 to 5 hours and 6% watched more than 5 hours a day. This shows that **children's TV viewing habits are changing for good, perhaps as parents and guardians set guidelines and limits for them to view TV.**

Figure 30: Time children spent viewing TV per day
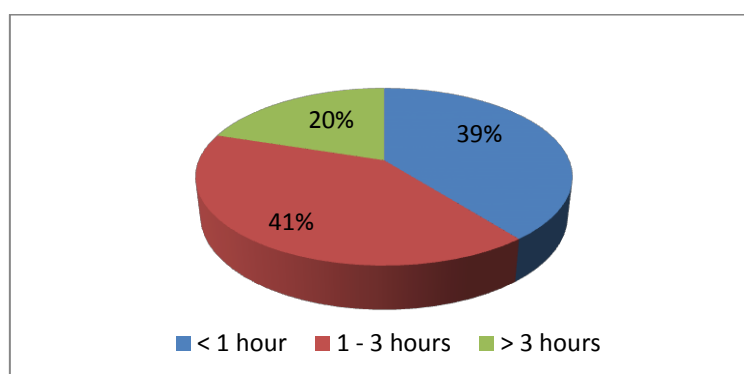
The amount of time spent watching TV did not vary much between rural and urban children.

Among rural children:

- 19% watched TV less than an hour a day,
- 22% watched between 1 to 3 hours,
- 7% watched between 3 to 5 hours, and
- 4% watched more than 5 hours a day.

Among urban children:

- 21% watched TV less than an hour,

- 19% watched between 1 to 3 hours,

- 6% watched between 3 to 5 hours, and

- 3% watched TV more than 5 hours a day (see Table 23).

More than 38% of the respondents noted a positive impact of TV on their children:

- 25% of the respondents said that TV viewing gave them more exposure/confidence,

- 8% said that TV made their children better informed about other countries, and

- 5% said that TV made their children better informed about Bhutan.

While 11% of the respondents said that they did not notice any impact of TV on children:

- 27% said that TV affected children's school work,

- 10% expressed that TV made their children imitate fashion styles,

- 4% of the households said that TV viewing made their children want to consume more and/or become more materialistic,

- 3% said that TV viewing affected children's sports/outdoor activities, and

- 2% said that TV viewing made their children read less.

Figure 31: Impact of TV on children
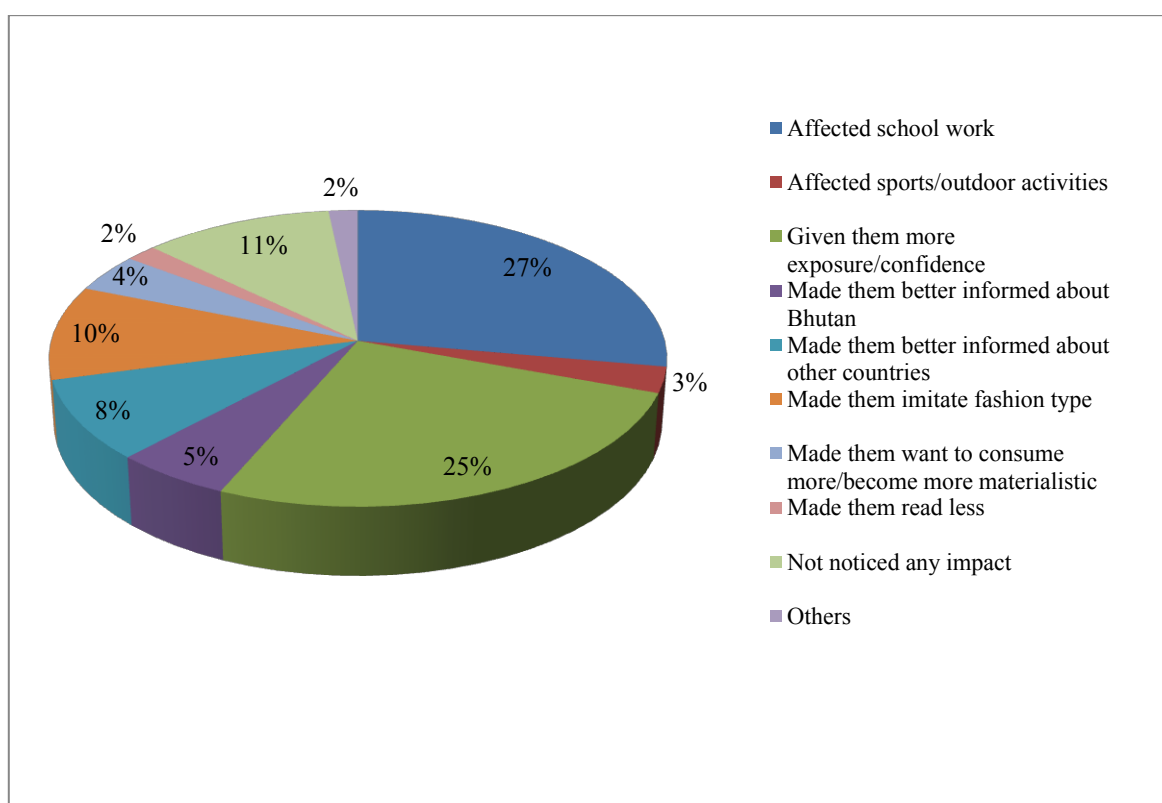
The study also asked households if they set any limits or provided any guidance in their children's TV viewing habits.

41% of households said they placed TV viewing time limits on children or provided guidance to them, while 36% let their children watch TV without setting any time limits or providing guidance.

9% of the households said their children watched TV only after they have done their homework.

An equal percentage (4%) of the households said that they guided their children to watch:

- certain TV channels only or
- TV with adults only or
- TV on weekends only.

TV has entered Bhutanese homes' living rooms as a normal commodity of our household. However, its effects on the people and particularly young children should not be ignored.

The impact of TV and viewing habits on children can be immediate or in a worst case scenario, build up gradually over time – in the way they dress, talk, behave and think. Children can be easily influenced by the exposure to a gamut of programs and advertisements in TV.

In that sense, many focus group participants and interviewees felt that it is important for families and parents to set TV viewing guidelines at home and carefully regulate viewing duration and content they watch.

Figure 32: Setting limits or guidelines for children to watch TV
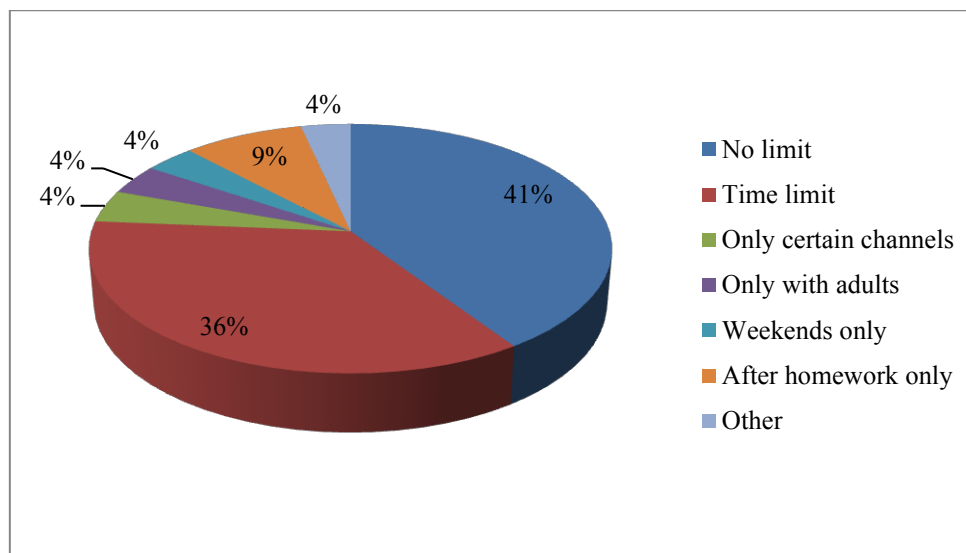
Survey respondents in rural areas said their children watched (or were allowed to watch) TV to learn (54%), for entertainment (27%) and to keep them occupied/quiet (15%). In urban areas, children watched (or were allowed to watch) TV to learn (47%), for entertainment (37%) and to keep them occupied/quiet (12%).

Figure 33: Reasons why children were allowed to watch TV
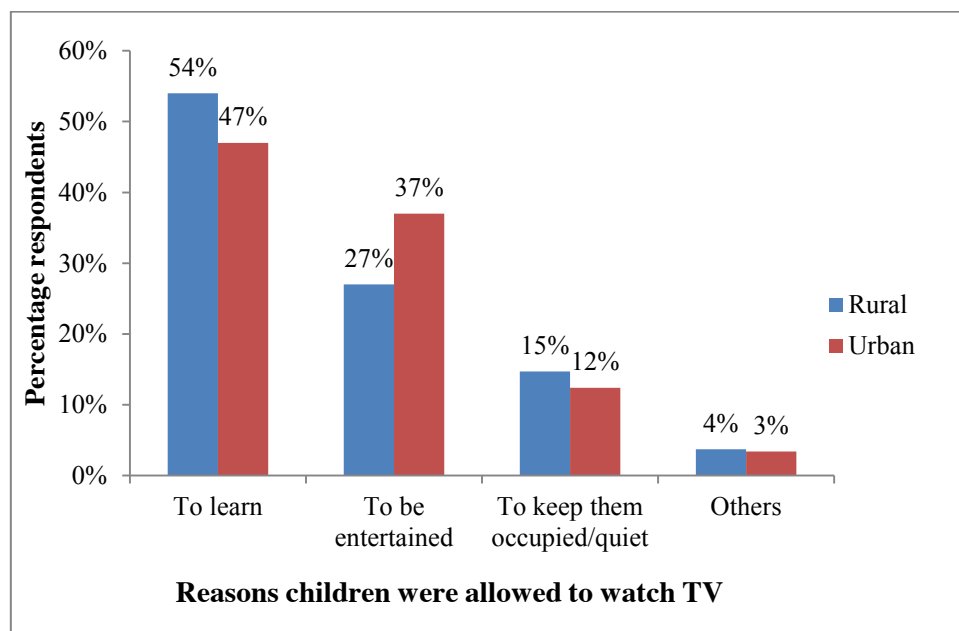
(b)   Economic development

The information and media industry in Bhutan has grown in leaps and bounds in the last five years, and has generated economic opportunities and created employment for many Bhutanese.

As of December 2012, it can be roughly estimated that the information and media industry (excluding internet and mobile telecommunication companies) employed around 3,000 people directly, out of which BBS employed 373, newspaper agencies employed 423, and other radio stations employed 30 people.

The rest worked in films/movies, music, drama and dance, publishing, cable TV, community information centers, and other information and media-based industries (advertising, designing, training, non-governmental bodies etc.).

In addition, the information and media industry creates numerous indirect jobs in businesses supporting its economic activity such as housing and office spaces, food and catering, transportation, finance and banking, etc.

In addition to the jobs created, the information and media industry also contributes to the government exchequer through taxes, levies and fees. Details could not be furnished as determining the information and media industry's contribution to GDP was not within the scope of BIMIS 2013.

8.3   Good governance

A free and independent media is vital for good governance and a vibrant democracy. As the watchdog of the government, media plays a critical role in ensuring transparency and accountability in the governance system. Media is also recognized as a powerful medium to educate and inform the people, empowering them with right knowledge and information, enabling them to make informed decisions.

A free media system must be aligned with responsible citizenship, good governance and democracy. The disclosure of government information by the media not only makes people informed citizens, it also encourages them to exercise their right to know, which is imperative when they are to make choices regarding their participation in political and socio-economic affairs.

Accurate and sufficient information should enable people to help them make rational decisions and take the right course of action beneficial to them.

Bhutanese media have played an active role in informing and educating Bhutanese society on developments taking place in the country. In terms of good governance, the media, particularly TV, have helped in fostering public discourse and debates in a young democracy. For instance, during the first parliamentary and subsequent local government elections, public debates on TV drew people's attention across the country, which had impacts on the outcomes of the elections.

Bhutanese media have also tended to focus largely on covering corruption, transparency and accountability, which have been challenges and issues of concern while the public sector strives to achieve good governance.

Achieving good governance requires the understanding and participation of every member of the society. The media, their roles, channels and content, are considered powerful enough to make this achievement a reality. But a great number of existing media channels, and the content they deliver, cannot take up this responsibility adequately because they are not accessible or affordable for all.

Focus group participants and interviewees said while print and broadcast (TV and radio) media have played significant roles in raising awareness and education on democracy and public discourse, media could do more in terms of fostering public discourses in remote far-flung areas. Some interviewees expressed that improved mobile telephone coverage has also played a significant role in keeping urban and rural people connected and informed.

8.4   Environment

Article 5.1 of The Constitution of the Kingdom of Bhutan enshrines that "Every Bhutanese is a trustee of the Kingdom's natural resources and environment for the benefit of the present and future generations and it is the fundamental duty of every citizen to contribute to the protection of the natural environment, conservation of the rich biodiversity of Bhutan and

prevention of all forms of ecological degradation including noise, visual and physical pollution through the adoption and support of environment friendly practices and policies."

Article 5.3 enshrines that "The Government shall ensure that, in order to conserve the country's natural resources and to prevent degradation of the ecosystem, a minimum of sixty per cent of Bhutan's total land shall be maintained under forest cover for all time."

The Bhutanese media, through coverage of various development issues, are educating and influencing Bhutanese people to meaningfully partake in the national development process.

Of the development topics covered by Bhutanese media, culture was the most covered (34.9%) followed by social (31.2%), politics (13.3%), environment (8.4%), and economic (7.8%). See Figure 27.

Coverage of issues on environment generally includes legal, policy and regulatory information, advocacy and education on relevant constitutional provisions, and mainstreaming environment in all developmental programmes and projects.

CHAPTER 9: MEDIA AND DEMOCRACY

Media plays a crucial role in shaping a healthy democracy.

A democracy ceases to be a democracy if its citizens do not participate in its governance. To participate intelligently, they must know what their government has done, is doing and plans to do in their name. Whenever any hindrance, no matter what its name, is placed in the way of this information, a democracy is weakened, and its future endangered. This is the meaning of freedom of press. It is not just important to democracy; it is democracy.

– Walter Cronkite famous journalist and long-time CBS News anchor

In any strong and accountable democracy, media must be independent, responsible and free. Journalists must be allowed to question and probe and hold politicians and public officials accountable for their actions. To encourage growth and freedom of media, there has to be a media that is itself free and worthy of the trust of the people.

Many focus group participants and interviewees expressed that the media played a crucial role of a watchdog during the tenure of the first democratically elected government, and at times, seemingly been in opposition to the ruling party.

People recognizes media's vital role in a young democracy. Focus group participants said print and broadcast media have played significant roles in raising awareness and education on democracy and facilitating public discourse. Bhutanese media has actively participated in and accompanied the evolution of democracy in the country in the past five years.

However, they felt media could do more in terms of fostering public discourses in remote far-flung areas. They also said media trying to play the opposition to the majority ruling government was a wrong move. **People also said that media has helped youth understand about democracy and must continue educating the people to participate in the democratic process.**

9.1   Modes used for discussions about democracy and politics

Survey respondents were asked to select the top three modes they used to engage in discussions about democracy and politics.

19% used business and/or social meetings to engage in discussions about democracy and politics, 16% used live call-in radio and live call-in TV while 12% used SMS and phone calls.

Only 5% used online forums (social media, Internet chats etc.) to discuss issues related to democracy and politics.

Interestingly, a huge chunk of the respondents (67%) said they did not engage in discussions about democracy and politics. This calls for focussed interventions by the government to promote the use of relevant media platforms to engage people in discussions on democracy and politics.

Figure 34: Modes used for discussion about democracy and politics
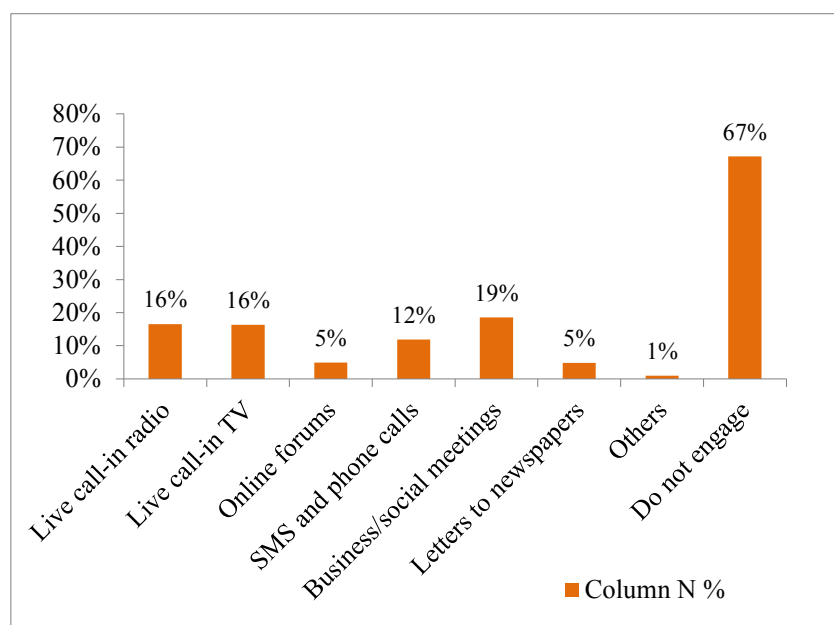
9.2   Decision on choosing an elected representative

When respondents were asked which top three media they watched/listened to/read influenced their decision on choosing their elected representatives, Bhutanese TV influenced the most with 48%, followed by Bhutanese radio (35%) and Bhutanese newspapers (11%). See Table 24.

This shows that TV followed by radio had the most influence in the people's choice of their elected representatives. Media thus had significant impacts on the outcomes of the historic 2008 parliamentary elections as well as the 2011 local government elections.

9.3   Participation in public discourses

When respondents were asked which top three media that they watched/listened to/read influenced their participation in public discourses, Bhutanese TV's influence was similarly the greatest with 41%, followed by Bhutanese radio (31%) and Bhutanese newspapers (19%). See Table 24.

Thus, **in order to encourage people's participation in public discourses and debates, the government must initiate and implement projects to improve TV coverage across the country.**

9.4   Opinion on political parties/candidates

When respondents were asked which top three media that they watched/listened to/read influenced their opinion on political parties/candidates, Bhutanese TV's influence was again the highest with 46%, followed by Bhutanese radio (35%) and Bhutanese newspapers (23%). See Table 24.

9.5   Sense of duty as a citizen

When respondents were asked which top three media that they watched/listened to/read influenced their sense of duty as a citizen, Bhutanese TV influenced the most with 51% followed by Bhutanese radio (39%) and Bhutanese newspapers (24%).

Internet/online media had some influence in the people's choice of elected representatives, their participation in public discourses, opinion on political parties/candidates and sense of duty as a citizen while foreign media had the least influence on these democratic themes.

Table 24: Influence by media type on democratic themes

Media type	Influence by media type on:											
	Decision on choosing your elected representative			Participation in public discourse			Opinion on political parties/candidates			Sense of duty as a citizen		
	Yes	No	Don't know	Yes	No	Don't know	Yes	No	Don't know	Yes	No	Don't know
Bhutanese radio	35%	7%	18%	31%	10%	20%	35%	8%	18%	39%	3%	18%
Bhutanese TV	48%	8%	27%	41%	13%	27%	46%	8%	27%	51%	5%	25%
Indian TV	11%	17%	29%	7%	20%	28%	12%	16%	27%	14%	14%	28%
Foreign TV / newspapers	7%	10%	27%	6%	11%	26%	8%	9%	26%	9%	8%	26%
Bhutanese newspapers	23%	5%	27%	19%	7%	27%	23%	4%	26%	24%	3%	25%
Internet/Online	10%	6%	27%	8%	6%	27%	10%	5%	26%	11%	4%	26%

CHAPTER 10: SOCIAL MEDIA AND CHANGE

Today, we have access to an almost inconceivably vast amount of information, from sources that are increasingly portable, accessible, and interactive. The internet and the explosion of digital media content have made more information available from more sources to more people than at any other time in human history. This brings an infinite number of opportunities for education and learning, entertainment and social connection.

Social media (e.g. Facebook, LinkedIn, Twitter etc.) is gaining popularity among the urban educated lot fuelled by 'unlimited' international content, user-friendliness and cost-effectiveness, and a liberal internet market policy. Many educated Bhutanese access social media on a daily basis to interact, network, and share information. Social media is also widely used to express views and opinions on socio-political and economic issues.

BMF's HRD Master Plan for Media (2012-2016) notes that social media plays an important role in Bhutan and is now increasingly becoming prolific. Many Bhutanese, from ordinary school-going children to the Prime Minister of Bhutan is now on Facebook. The number of Bhutanese bloggers is on the rise as well.

MBS 2012 found that most mainstream media were discussing issues pertaining to the fast growth of the social media and felt the need for a National Social Media Policy. Many journalists were also using social media for reporting and producing stories they write.

BMIS 2008 observed that internet was more vibrant during the elections and that there was an increase in blogging and social networking among the educated population.

This study finding also shows that although internet has not yet penetrated to rural areas, it is becoming the most preferred vehicle of information amongst urban youth. Social media (such as Facebook and Twitter) and mobile phones are becoming an attractive way for urban youths to communicate and interact socially.

There is a visible and major barrier between the different social structures as far as access to the internet is concerned, but this is expected to change over the next couple of years with the expansion of 3G services and introduction of 4G services in the country.

BIMIS 2013 also found that most media houses now have their own websites and some had created their presence on social network pages like Facebook.

Focus group participants and in-depth interviewees expressed that the internet and social media has changed the way people participated in discussions on socio-political and economic issues, pursued life-long and self-learning, and interacted with each other in an increasingly interconnected world.

10.1 Frequency of accessing the internet

Of the 23% respondents who had access to the internet, mostly in urban areas (see Figure 15), when asked how often survey respondents accessed internet, 11% accessed internet daily, 7% accessed 2-3 times a week, 2% accessed once a week and 1% accessed a few times a month.

Thus, **about 48% of the population with internet access accessed internet daily for various purposes such as for online news, entertainment, social networking and blogging.**

Figure 35: How often do you access internet?
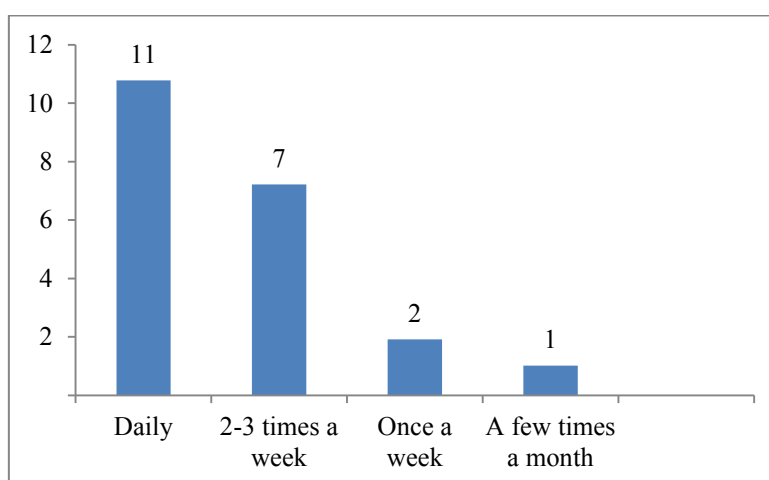
10.2 Impact of internet use

With regard to the impact created by internet use, 11% of the respondents said they gained knowledge while 7% said that they have been able to take advantage of social networking sites.

Generally, use of the internet has allowed people to gain knowledge and then to access and benefit from social networking sites. Use of internet for business purpose is very limited.

Figure 36: What main impact has internet use created?
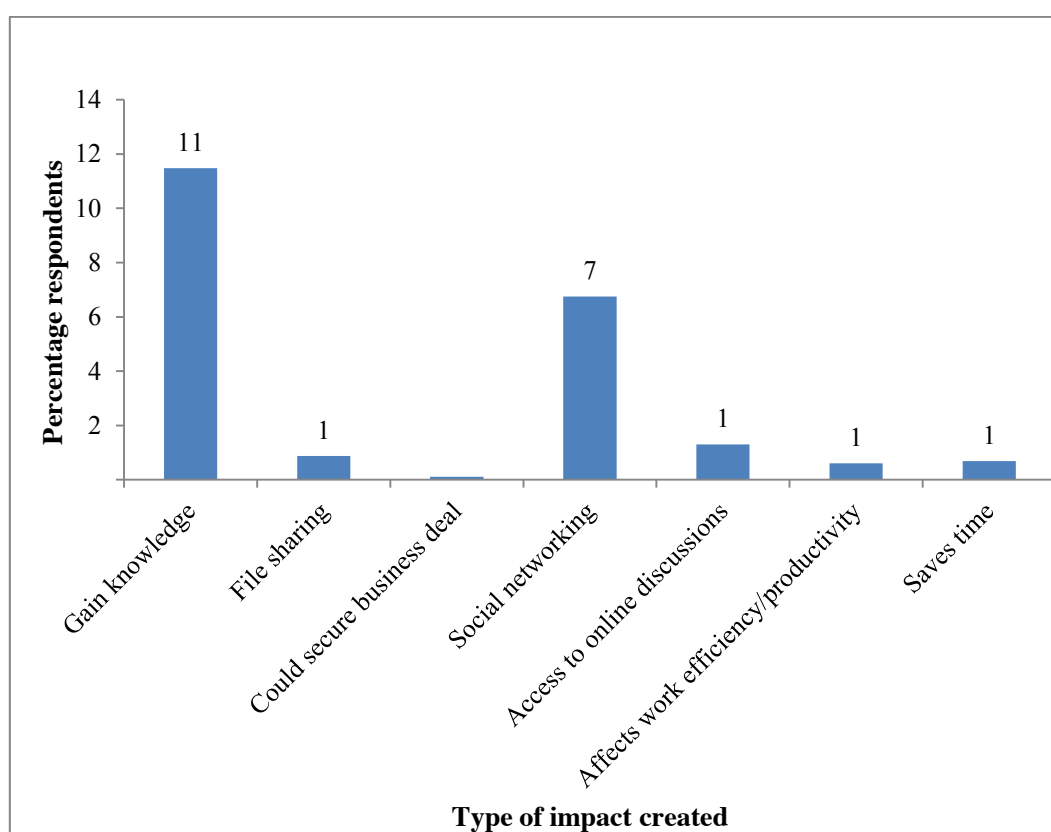
10.3 Impact of mobile telephony

22% of the sampled population who had mobile phones used it to access internet (See Figure 14). This shows that the expansion of GPRS/EDGE/3G mobile services in most urban areas has increased mobile broadband subscriber base.

The survey findings show that the impact of mobile telephony on marital or personal relationships, while not very significant at this stage, is being felt in both urban and rural areas.

27% of the sampled population said mobile telephony impacted their marital or personal relationships. Majority (66%) felt this was not the case.

Table 25: Has use of mobile impacted marital or personal relationship in life?

Rural				Urban				Total			
NA	Yes	No	Don't know	NA	Yes	No	Don't know	NA	Yes	No	Don't know
1%	25%	66%	8%	0%	29%	67%	5%	1%	27%	66%	6%

Use of mobile telephony mostly led to misunderstanding between people in a marital or personal relationship – 17% in urban and 13% in rural. Some even got married after a personal relationship while a few separation cases were also cited among married couples. A few did not feel any impact of mobile on their marital or personal relationships in life.

Table 26: How use of mobile has impacted marital or personal relationship in life?

Rural						Urban					
NA	Got married	Got separa-ted	Led to misunder-standing	No impact	Others	NA	Got married	Got separa-ted	Led to misunder-standing	No impact	Others
75%	8%	2%	13%	1%	1%	68%	9%	2%	17%	3%	0%

CHAPTER 11: MEDIA DEVELOPMENT CHALLENGES

This chapter describes various challenges facing the development of Bhutanese information and media industry and hence impacting its growth. **Most of these challenges are inherent in Bhutan's economic constraints such as small domestic market, inadequate infrastructure, high transportation cost, limited access to finance and potentially problematic funding mechanisms, reactive policies and regulations, lack of business management skills, untrained media professionals, too few media experts and absence of research and development initiatives.**

11.1 Lack of media professionalism

Lack of professionalism and quality of journalism is a recurring and pressing issue of concern in the Bhutanese information and media industry.

MBS 2012 states that the limited number of journalists and other media professionals are not able to keep up with the fast growth of the media market, particularly in the print media. While capacity building programmes are in place, it is not able to cater adequately to the ever-growing size of the Bhutanese information and media market. The study also found that lack of trained and qualified media professionals with adequate experience and skills has resulted in poor media content, further affecting professionalism and credibility.

MBS 2012 also found that most private radio stations do not have regular newscasts and are largely entertainment based. Private radio stations lacked the necessary infrastructure and resources to expand their services to other parts of the country.

BMF's HRD Master Plan for Media (2012-2016) mentions that there is no coordinated national approach to addressing the human capital development needs of the information and media sector. It also noted that the turnover rate of media people (switching jobs and organizations) is high. Most senior journalists have switched careers, leaving a professional vacuum in the industry with not enough competent and trained journalists to fill in. Besides, media houses risked training staff that ended up working for their competition.

BMF's HRD Master Plan for Media (2012-2016) also pointed that that there is no shared vision within the information and media industry on what Bhutanese media should be like, and what kind of content, style and form it should be presenting to the GNH society, and how it should be wary of media imperialism. This was reiterated by some editors and journalists during the focus group discussions. There is also lack of a single voice in the media industry and limited unity and camaraderie among different stakeholders.

Focus group participants and experts interviewed mentioned that young graduates join the media in a bid to gain experience and later shift into a better earning profession. They also said there are very few media training institutes in the country. Focus group participants and interviewees also felt many media personnel do not possess journalistic ethics and a sense of responsibility, and forgot their duties as a citizen first.

Media experts pointed that most of the media houses are young and inexperienced. Many do not have in-house code of ethics, agreed editorial policies or any such professional practices. The unhealthy, financial situation of these media houses hinders any investment in human resources. Thus, despite the dramatic changes over the past few years, the current Bhutanese media remains in a fledgling state of professionalism.

A parliamentarian remarked that **Bhutanese media has become more daring in the past five years but has not been able to find a balance between the need for objectivity and at the same time the need to appreciate the sensitivities surrounding some of our profound national interests.**

Among the newspapers, trustworthiness and credibility declined due to stiff competition and small size of readership, thus impacting both professionalism and sustainability of the newspaper outlets. **Newspaper proliferation also resulted in major sensationalism and exaggeration in the process of beating the competition to 'sell well'.**

For the film industry, MBS 2012 found that inadequate technical resources, erratic financing, slackness in writing and direction and acting, and the deep culture of Bollywood influence have all contributed to the poor quality of films. The showing of films is concentrated in two urban towns, Thimphu and Phuentsholing. There is lack of professional scriptwriters, film directors and producers as well as professional distribution and marketing system.

11.2 Media sustainability mainly dependent on public sector advertising

Business sustainability has been a major challenge particularly facing the private media houses, in the past five years.

The opening of the information and media market in 2006 and the ushering in of parliamentary democracy in 2008 resulted in the proliferation of private media players, mostly newspapers and radio. However, media businesses in Bhutan mainly rely on public sector advertising for their sustainability. The advertising market is very limited as spending on advertising and marketing by private businesses and consumers are insignificant under the current circumstances.

MBS 2012 mentions that media business sustainability is at crossroads with a large chunk of the revenues coming from government advertisements. As advertisements are their main source of revenues, media houses may be motivated to serve the interests of the advertisers rather than the general public.

The high turnover rate of employees in private media houses has also impacted media business sustainability in Bhutan. Reporters and editors switched careers impacting the quality of journalism and credibility of the media houses, thus jeopardizing their business continuity arrangements.

Some interviewees felt that any form of subsidy to media must be discouraged and avoided, as far as possible, and let the market forces determine the outcomes. It is also timely for media houses to formulate business continuity and sustainability strategies and plans that will ensure their freedom and objectivity.

Focus group discussions with media revealed that all private media houses, particularly the newspapers, are facing severe funding constraints and some are even contemplating closing down their businesses. They also felt that policy and regulatory compliance requirements could 'kill' some of them along the way. Due to lack of printing facilities of their own, small newspaper firms have reported that newspaper printing is costly and a financial liability.

MDA 2010 also pointed that the social mandate of promoting the national language posed

financial challenges and media houses have deliberated on how to continue publishing in Dzongkha, without comprising professionalism and sustainability of their businesses.

BMF's HRD Master Plan for Media (2012-2016) lamented that many media houses operate on a shoestring budget, with little or no reliable budget, for enhancing the knowledge and skills of their staff, not even those of their core employees.

This study finding also shows that there is no level-playing field between the public and private media houses, which poses sustainability challenges to the later.

The focus group discussion with media leadership and management also brought out the sustainability challenges posed to media development by limited information and media infrastructure across the country and the high transportation cost associated with distribution.

Media focal persons said that the proliferation of media has meant more duplication and confusion, which posed its own set challenges to advertisers in the ethical and fair use of the public funds. They also revealed that the marketing and advertising personnel are not professional in the way they approached the advertisers. One of them said that 'media houses feel that it is their right to get advertisements.'

The draft Government Advertising Policy was politicized and could not be approved for implementation due to concerns raised by most private media houses. Some media houses refused to participate in the circulation auditing conducted by the government.

11.3 Difficult access to public information

In the absence of an adequate and dynamic framework for information sharing and dissemination to the public, media organizations are facing challenges in accessing public information from government bodies, public agencies and designated officials.

MBS 2012 pointed that access to and availability of information is the basis for accurate research, analysis and reporting by the media as media has the responsibility of informing the nation and its people on matters and issues concerning their livelihoods, welfare and other strategic concerns of community, regional and national importance in a balanced and

sustained manner.

The focus group discussion with media focal persons revealed that many media focal persons did not have clear job responsibilities. On one hand, they are assigned with the dual role of planning and implementing advertising, and press liaison, as per the Government Advertising Guideline 2012. On the other, they are also tasked with ad hoc additional responsibilities, which resulted in losing focus impacting the quality of delivery of their assigned functions. Besides, officials who were trained by DoIM/MoIC did not either act as the media focal persons or at times were transferred to other departments or agencies. No systematic continuity arrangements exist at present.

This study also found that many media focal persons lacked awareness on Government Advertising Guideline 2012 and Circulation Audit Guideline 2011 documents.

During an interview with a minister, he said that the engagement of media focal persons is not as effective as it ought to be. There is a lack of conscious planning, which resulted in ministers and secretaries having to be engaged with media most of the time. He attributed this to the lack of trained media focal persons. He also added that proper media planning is necessary to ensure the right choice of media for advertisements.

MDA 2010 pointed that although physical abuse was not a major concern to journalists, they undergo mental stress while reporting on sensitive issues from the pressures unique to a small society.

11.4 Unbalanced and urban-biased media coverage

Another major challenge facing the Bhutanese information and media industry is the urban-centric and urban-biased information and media coverage. All information and media houses are based out of the capital city of Thimphu. A few of them have bureau offices and correspondents in a couple of other towns. This undermines the media's reach to and coverage of rural areas. Most of them lack resources to dispatch journalists to rural areas; even if they had physical access to a particular remote area, they often lacked professional capacity to grasp the story and relay it to the public.

MDA 2010 indicated that while access to media has considerably increased, rural populations

still have low access and low coverage. Media in Bhutan was still essentially urban centric. There were also perceptions that reporting was biased. Media agencies were highly competitive and often divided and have also been accused of partisan coverage.

MBS 2012 pointed out that the Bhutanese media are mostly urban-centric as most of them are based in Thimphu. Besides, it also lacks nationwide coverage particularly rural issues as they do not have a wide network and thus do not include views of all sections of the society. To make matters worse, regional coverage of the media houses is shrinking with most withdrawing their correspondents and closing bureau offices to cut down costs and sustain in the market.

Although radio has wider reach and audience, and remains the best source of information to the rural masses, the contents it delivers don't necessarily reflect the overall views of the society. TV content is also largely urban-biased.

With significant changes in the socio-political climate in the past five years, civil society and media have been given more manoeuvring space to cover a wider range of topics and issues. However, links between the civil society, community-based organizations and media are still weak for Bhutanese society to benefit from these changes.

11.5 Limited media literacy and public education programmes

Media literacy represents a considerable challenge for the government because it involves suitably facilitating and empowering Bhutanese citizens with appropriate tools to better understand the information and media environment including the digital media, which is becoming more pervasive in Bhutanese society.

BMS 2012 states that media is a source of education for the mass, who in turn are the most important consumers of information. However, owing to lack of media literacy amongst the general public, there is lack of participation in the media as active citizens.

Furthermore, the news consumers, in general, do not critically analyze what they watch, hear and read which includes identifying author, purpose and point of view, examining construction techniques and genre, examining patterns of media representation, and detecting propaganda, censorship and bias in news and public affairs programming (and the reasons

thereof).

Media literacy should enable the public to better understand and analyse the media messages and content they encounter and to acquire the skills which will enable them to play their role of citizen fully.　It also contributes to safeguarding the pluralism and independence of the media.　It permits the expression of diverse opinions from different social groups and promotes the development of the values of tolerance and dialogue.

Media literacy also plays an important role in enhancing awareness of the Bhutanese heritage and cultural identity.

While DoIM/MoIC and the Bhutan Centre for Media and Democracy (BCMD) have embarked on media literacy education programmes, most of these initiatives are urban-oriented and hence need to broaden their outreach to the uneducated and rural population.

11.6　Legal, policy and regulatory challenges

MBS 2012 pointed that media regulation is inadequate.　The regulatory authority was grappling with evolving media scenario of media convergence.　While the BICM Act was being amended, the regulatory authority was still struggling to develop regulations for all forms of media in the country.

Participants at a seminar on Public Service Broadcasting conducted by BCMD in 2010 recommended an amendment to the BICM Act to incorporate a chapter on Public Service Broadcasting (PSB) and the integration of public service obligations into the existing policy and planning, and in media development.

MDA 2010 mentioned that without a proper legal framework, there was room for editorial independence to be manipulated.　It also stated that in the absence of a proper advertising policy, government advertisements are haphazardly distributed among media houses. It depended on personal relationship, coercion, offering cuts and false media statistics.

The Government Advertising Guideline 2012 states that in selecting the media to place advertisements, besides media reach, criteria such as promotion of Dzongkha and understanding of GNH values would be considered, which can be subjective and prone to

manipulation by concerned officials.

Bhutan does not have a Media Council to scrutinize the ethical standards of journalists. Media organizations also lack basic in-house policies on occupational safety and health of journalists.

Income tax holidays offered by the government can only be availed by information and media houses incorporated under the Companies Act of Bhutan. Only two percent of the income of a company spent on advertising is tax deductible, which has discouraged private companies from spending on marketing and advertisements. Further, a double licensing regime has caused inconveniences to the information and media industry.

CHAPTER 12: RECOMMENDATIONS

BIMIS 2013 undertook a comprehensive analysis of the information and media sector in Bhutan, based on a quantitative survey and a qualitative study, including a comparative study/literature review, to understand the impact of information and media on society, trends in media content and, pattern of information and media consumption, among others.

Based on this analysis and findings, this chapter sets out a number of recommendations of the study which could be used to guide legislative, policy, regulatory and business operations strategy and direction for the fast-changing information and media industry in Bhutan.

Some of the recommendations are a deliberate reiteration from the key information and media studies and materials of the past five years, viz. Media Baseline Study 2012, HRD Master Plan for Media (2012-2016), Media Development Assessment 2010, and Bhutan Media Impact Study 2008, but with further elaboration and concrete ideas for their effective implementation by responsible agencies and stakeholders.

12.1 Enhancing media professionalism

12.1.1 Government priority must be accorded to implement a more focused and coordinated approach to human resource development involving key stakeholders – government, donors and development partners, private sector (industry), and civil society – for professional development of the information and media industry.

12.1.2 The need for ethics and understanding of responsibilities for the media through formal training and post-training mechanisms is paramount. Government, along with key stakeholders, must strategically facilitate media-specific trainings (entry-level, intermediate and advanced) and follow-up measures for both aspiring and practicing media personnel, through more formal, sustainable and organized skills development programmes.

12.1.3 Human resource development needs of the information and media industry must be integrated into the larger private sector development programmes of the government such as the 'HRD Master Plan for Private Sector' formulated for every five-year plan by the Ministry of Labour and Human Resources. As a starting point, BMF's HRD Master Plan for Media (2012-2016) could be used as a reference document.

12.1.4 Bhutanese information and media players must embark on establishing formal linkages with the academia, information and media training institutes, information and media industry and experts, inter-governmental agencies, professional associations, and civil society and non-governmental organizations, both in-country and abroad.

12.1.5 Stakeholders must strive to create a conducive and stress-free environment for news gathering and reporting for journalists. Media support networks and associations could help set up recreation centers and R&D facilities.

12.2 Media sustainability measures

12.2.1 As agents of change, media must manage change responsibly and credibly. Sustainability of media must also include social and political sustainability, besides economic sustainability. Media houses must be encouraged to develop business continuity and sustainability strategies and plans that will ensure their freedom and objectivity.

12.2.2 Public funding, in any form, to information and media houses should be:
- Made available to information and media houses, which publish a code of conduct easily accessible to the public (including on their websites), and
- Based on non-discriminatory, objective and transparent criteria, which are made known in advance to all information and media houses.

This includes government advertising, which should not be used as form of economic support of the media businesses as it has the potential to breed corruption and government censorship, as well as to compromise the independence of a free media.

12.2.3 Appropriate policy and regulatory frameworks must be put in place mandating sharing of centralized/nationalized/state-owned information, communications and media infrastructure among all information, communications and media players especially radio, TV and print media.

The main objectives are to reduce financial burden on information and media houses, encourage innovative content and applications development, and promote competition by reducing entry barriers, thus maximizing optimum use of existing resources and creating a level playing field for all market players.

Infrastructure sharing is also vital to achieving balanced coverage and affordable access to information and media services.

12.2.4 Given Bhutan's limited advertising market, mainly dominated by government advertising, information and media houses should develop marketing and advertising strategies to entice private companies and corporate houses, both in-country and abroad, subject to upholding GNH values.

12.2.5 An enabling information and media entrepreneurship ecosystem must be established to incubate media entrepreneurs and start-up businesses and help them successfully commercialize their business ideas and/or enterprises.

12.2.6 Dzongkha editions should not be a licensing criterion for English newspapers if Dzongkha language is to be promoted effectively. Dzongkha newspapers must be provided appropriate incentives and support for local content development.

12.2.7 Information and media houses must deploy innovative ideas to sustain and reach people across the country, meaning their business models need to be reviewed in light of the fast-changing media landscape. They should harness the untapped potential of the internet and digital/social media to tackle the challenges posed by new media and technologies to conventional media business models.

For example, in order to improve the reach of newspapers to rural areas, all newspaper houses should be encouraged to develop online editions and also implement PDF subscription (as are being practiced by some newspapers), to

overcome challenges posed by Bhutan's geo-demographic situation. A way of encouraging this would be to accept online (presence) readership while determining their reach.

Community Centers should become the distribution points for information and media houses including for the film industry.

12.3 Facilitate access to public information

12.3.1 The Right to Information Bill must be customized to Bhutan's unique social, political and economic context through an all-inclusive stakeholder and public consultation, and must be subject to good practice due diligence process, prior to its passage by the Parliament.

12.3.2 Proper institutional arrangements must be put in place and capacity developed to facilitate access to public information including training of media focal persons and media planning officers (new post to be created) for successful delivery of information and media functions.

Specifically, media planning officers must be trained to plan and budget media and communications activities according to the type of media, access and reach, frequency etc. apart from the circulation audit criteria so as to maximize public benefit of the government spending on information, communications and media programmes.

12.3.3 Government, in consultation with stakeholders, must develop a strategic framework to use mobile platform for enhanced delivery of public information and services, based on lessons learnt from the G2C project and best practices in other countries.

Mobile applications development must take into account local content and language support needs of user groups and communities, security and privacy issues, among others.

12.4 Fostering pluralism and diversity of media

12.4.1 Information and media houses must be encouraged to expand their coverage of the whole country not only in terms of access to and availability of media but adequately reporting on community, rural and regional issues from across the country, with pragmatic support measures from the government and other stakeholders including civil society.

For instance, the proposed Government Advertising Policy/Guideline should include balanced media coverage as one of the criteria (besides circulation and viewership figures) for securing government advertising.

12.4.2 Bhutan has both public and private media players, except in television. It is timely to introduce competition in the TV market to promote local content development, facilitate delivery of more diverse, plural and creative/innovative content, and offer choice to the viewers, thus countering the onslaught of foreign channels in Bhutanese homes. The drastic increase in the ownership of TV sets in the past five years makes the case even more compelling.

12.4.3 Journalists and media houses should adapt their codes of conduct and journalistic standards to the challenges posed by a rapidly changing media environment.

In particular, they should clearly address questions of source verification and fact checking, as well as self-regulating their relationship with external sources of news stories, so as to have balanced and objective representation of views of all sections of the society.

12.4.4 The government must conduct information and media content analysis from time to time to evaluate the progress made on promoting local content relevant to all sections of the society.

12.4.5 Linkages between civil society and the media must be fostered and strengthened to cover topics and issues more openly and diversely than ever before. Media must engage positively with the emerging civil society and community-based

organizations to influence coverage of issues important for the public at large. Likewise, civil society should creatively interact with media to push for coverage on governance and development issues.

12.5 Expand and accelerate media literacy and public education programmes

12.5.1 The government, in collaboration with the academia and civil society organizations, must accelerate media literacy programmes and projects in order to develop the ability of citizens to skilfully access media, understand and critically evaluate different aspects of the media and media content, as well as to create independent media and participate as active citizens in a democratic society.

12.5.2 Media literacy and public education programmes should deploy appropriate media platforms based on the target audience.

Citizens in rural areas could be better reached through mobile applications, radio and TV programmes while those in urban areas could be served best over the internet/social media, mobile applications and TV programmes.

12.5.3 Media literacy should be taught in schools starting at primary school level. The role media plays in a functioning democracy should be critically assessed as part of national curricula, integrated either with civics or social studies.

12.5.4 Nationwide education and awareness programmes/campaigns on new media must be conducted to enhance the generic skills, attitudes and knowledge of citizens and consumers required for living in an Information Society, which in turn can generate spill-over effects that boost growth, jobs and innovation in the digital market.

An online education tool on new media technologies (e.g. consumer rights on the internet, e-commerce, data protection, media literacy, social networks, etc.) could also be initiated.

12.6 Reforming legal, policy and regulatory frameworks

12.6.1 The government must enhance policy and regulatory capacity in information and media sector to ensure effective and professional custody and enforcement of the legislative, policy and regulatory instruments. For instance, there is an urgent need to recruit information and media specialists in the regulatory agency.

12.6.2 The converged regulator must be strengthened in terms of both administrative and financial autonomy as well as being independent from political interference. Employees must be de-linked from the civil service and recruitment must be based on relevant expertise and competence.

An independent regulatory agency will ensure non-discriminatory treatment of all players in a competitive market environment.

12.6.3 Government should increase the tax deduction percentage on advertising expenses to encourage more marketing and advertising campaigns by corporate and private businesses.

12.6.4 Government should do away with the current double licensing regime for information and media houses. In addition to the licence from BICMA, information and media houses need to procure a business licence from the Ministry of Economic Affairs.

12.6.5 Given the increasing and diverse impact of social media on Bhutanese society, DoIM/MoIC should consider including policy elements of social media in the draft Information and Media Policy as well as incorporating necessary legal provision on social media in the revised BICM Act.

Annexure 1: List of literature review and other relevant documents

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Annexure 2: BIMIS 2013 Individual Interview Questionnaire

BHUTAN INFORMATION AND MEDIA IMPACT STUDY (BIMIS) 2013

INDIVIDUAL INTERVIEW QUESTIONNAIRE

(Data used for his survey cannot be used for taxation, investigation or enforcement purposes)

HOUSEHOLD IDENTIFICATION

Dzongkhag Name: _____ Code: ☐ ☐

Gewog/Town Name: _____ Code: ☐ ☐

Chiwog/EA Name:_____ Code: ☐ ☐

Sample Household Serial No: ☐ ☐ ☐ ☐

Status of the questionnaire:

1.   Completed with initially selected household
2.   Not completed, due to refusal   ☐
3.   Not completed, household not found
4.   Incomplete

I certify that the information gathered in this questionnaire was obtained/reviewed by me personally and in accordance with instructions.

Interviewer's Name_____ Date_____ Signature

Supervisor's Name_____ Date_____ Signature

Data Entry Person's Name_____Date_____ Signature

Introduction

My name is XYZ. I am representing the Department of Information and Media of the Ministry of Information & Communications. We are carrying out the Bhutan Information & Media Impact Study 2013 throughout the country to understand the impact of information and media on Bhutanese society, economy and governance.

Do you use any of the media available in Bhutan (radio, TV, newspapers, internet, mobile)?

We aim to use the data to provide better information and media services. We would like to assure you that we will take appropriate measures to keep all information confidential. You will note that we are not even asking for your name. Your information will be valuable to achieve the objectives of the study. The interview will take approximately 45 minutes.

Is it fine if we start the interview?

A. DEMOGRAPHICS

1) Age (in completed years):_____ years

2) Gender
    1. Male
    2. Female

3) How many adults (above 18 years) live in your household (those who live and eat together)? _____adults

4) How many children (below 18 years) live in your household? _____children

5) What is your main occupation?
    1. Businessman/woman
    2. Civil servant
    3. Armed forces
    4. Student
    5. Farmer
    6. Dependent/Unemployed
    7. Taking care of the house (home-maker)
    8. Others (specify): _____

6) Education completed (**the highest education level**)
    1. None
    2. Non-formal education
    3. Up to class 6
    4. Up to class 10
    5. Up to class 12
    6. University (Bachelor's or higher)
    7. Diploma
    8. Vocational
    9. Monastic education
    10. Others (specify): _____

7) What is the approximate monthly income of your household? Nu._____

B. GENERAL INFORMATIONAND MEDIA

1) Do you have access to media?
    1. Yes   2. No (**If no, end interview**)

2) What is your main source of entertainment?
    1. Radio
    2. TV
    3. Mobile phones
    4. Videos
    5. Sports events
    6. Cinema/films
    7. Music/Drama (Live shows)
    8. Books and magazines
    9. Online media
    10. Tshechus/festivals/fairs
    11. Others (specify): _____

3) What is your main source of news?
    1. Radio
    2. TV
    3. Internet/Online
    4. Newspapers and magazines
    5. Friends
    6. Parents
    7. Office colleagues
    8. Local leaders
    9. Others (specify): _____

4)   Who is your biggest influence/role model?

1. Family member
2. Friends
3. Religious figure
4. National leaders
5. Local leaders
6. International leaders
7. Local Movie star
8. International Movie Star
9. Others (specify): _____

5) Approximately, how much does your household spend on each of the following media every month?

Media	(Nu./month)
1) TV	
2) Videos	
3) Audio	
4) Films	

Media	(Nu./month)
5) Newspapers	
6) Books and magazines	
7) Internet	
8) Mobile phone	
9) Others (specify): _____	

6) What is the main language you use to read/listen/watch media with? (select and write the code against the type of media)

Media type	1. English 4. Lhotsamkha 2. Dzongkha 5. Do not use media 3. Sharchopkha 6. Others (specify): ____
1. Bhutanese newspapers	
2. Bhutanese TV	
3. Bhutanese radio	
4. Bhutanese websites	

C.   INFORMATION AND MEDIA COVERAGE

1) What topic in the media do you find the most important?

1. Social
2. Political
3. Environmental
4. Religious and cultural
5. Economic
6. Others (specify): _____

2) How often are issues important to you covered by Bhutanese media?

1. Frequently (more than once a week)
2. Sometimes (once or twice a month)
3. Rarely (once or twice a year)
4. Never

3)   Do the following media adequately represent people's views? (select and write the code against the type of media)

Media type	1. Yes 2. No 3. Don't know
1. Bhutanese TV	
2. Bhutanese radio	
3. Bhutanese newspapers	
4. Bhutanese websites	
5. Bhutanese movies/films	

Coverage of development topics:

4) What is the extent of media coverage and quality of information on the top 3 topics/issues under the 4 listed variables?)

Questions	5)	6)
Topics: Ask – Which are the topics you note are covered the most by the media? *(Circle the code. Then for each topic mentioned ask questions 5) and 6))*	To what extent are they covered by the media? 1. No information 2. A little information 3. Enough information 4. A lot of information 5. Don't know	What is the quality of the information on the top 3 issues covered by the media? 1. Good 2. Adequate 3. Poor 4. Don't know
SOCIO-ECONOMIC		
1. Business		
2. Agriculture		
3. Health		
4. Education		
5. Employment		
6. Livelihood		
7. Youth		
ENVIRONMENT		
8. Waste		
9. Forestry		
10. Pollution of air, water, soil		
11. Climate change		
12. Growth of towns		
13. Growth of villages		
GOVERNANCE		
14. Legislative (Parliament)		
15. Judiciary		
16. Executive (Government ministries, agencies)		
17. Constitutional bodies (corruption, election, auditing etc.)		
18. Civil society (including private sector)		
19. Dzongkhag Tshogdu		
20. Gewog Tshogde		
21. Role of media		
CULTURE		
22. Religions		
23. Traditions and customs		
24. Architecture		
25. Cinema and drama		
26. Folk stories		
27. Sports		
28. Music and dance		
29. Fashion		
30. Dress		
31. Food		

Questions	7)	8)
For the topics below, ask questions 7) and 8)	From which sources do you get the most information? 1. Official websites 2. Official documents 3. Pamphlets/brochures 4. Social media 5. Magazines 6. Newsletters 7. Community Information Centres 8. Offices 9. Others (specify) 10. Don't know	What is the quality of the information? 1. Good 2. Adequate 3. Poor 4. Don't know
1) Economic Development		
2) Environment		
3) Governance		
4) Culture		

D.   INFORMATION AND MEDIA USE AND CONSUMPTION

Media access and use: *We are interested in finding out your information and media use and consumption habits.*

1)	2)	3)		4)
From among the types of media available, please name the top 3 you listen to, view or read the most?	Is the following media available and do you read/listen/watch it? 1. Available, use 2. Available, don't use 3. Not available *(if 2 or 3, skip to next media)*	No. of hours and minutes used typically in a day.		Main reason of use: 1. News 2. Learning about issues 3. Entertainment 4. Communication 5. Work or homework 6. Advertising 7. Others (specify): ____
		Hours	Minutes	
1. Print				
2. Radio				
3. TV				
4. Social Media (internet)				

5) How many times did you read the top 3 print media in the last week? (Select and write the code against the top 3 print media)

1. Never	2. 1-2 times	3. 3-4 times	4. 5 or more times
1. Bhutan Observer			
2. Bhutan Times			
3. Bhutan Today			
4. Business Bhutan			
5. Bhutan Youth			
6. Druk Nyetshul			
7. Druk Yoedzar			
8. Druk Melong			
9. Gyalchi Sharshog			
10. Kuensel			
11. The Bhutanese			
12. The Journalist			

E.   INFORMATION AND MEDIA CREDIBILITY AND INFLUENCE

1) Which media do you prefer the most?

1. Bhutanese newspapers   5. International TV
2. Bhutanese TV   6. International Radio
3. Bhutanese Radio   7. Internet/Online
4. International newspapers 8. Others (specify): _____

Style and behavior: *We would like to find out how media influences you and your children. Please mention what you think as I call out the various media types:*

Questions	2)			
Media type	Does what you see/hear/read in radio/TV/newspaper/online influence your _____? (Select and write the code against the type of media) 1. Yes 2. No 3. Don't know 4. Don't use			
	Talking / language?	Dress?	Behavior?	Thinking/attitude?
1. Bhutanese Radio				
2. Bhutanese TV				
3. Indian TV				
4. Other foreign TV				
5. Bhutanese newspapers				
6. Internet/Online				

Questions	3)			
Media type	Does what your children see/hear/read in radio/TV/newspaper/online influence their _____? (Select and write the code against the type of media) 1. Yes 2. No 3. Don't know 4. Don't use 5. No children			
	Talking/language?	Dress?	Behavior?	Thinking/attitude?
1) Bhutanese Radio				
2) Bhutanese TV				
3) Indian TV				
4) Other foreign TV				
5) Bhutanese newspapers				
6) Internet/Online				

Credibility: *I shall now ask you questions on advertising and whether media content are believable or not.*

4)	5)	6)
Which media do you use for news? And, then for each media selected, ask questions 5) and 6).	Is the information of the following media believable/credible? 1. All of the time 2. Most of the time 3. Some of the time 4. None of the time 5. Don't know 6. Not available	How often does advertising on the following media make you want to buy/use products and services? 1. All of the time 2. Often 3. Sometime 4. Never 5. Don't listen/view/read advertisements
1) BBS Radio		
2) Kuzoo FM		
3) Radio Valley		
4) Centennial Radio		
5) Radio Waves		
6) Radio High		
7) International Radio		
8) BBS TV		
9) Bhutan Times		
10) Bhutan Observer		
11) Bhutan Today		
12) Business Bhutan		
13) Bhutan Youth		
14) Druk Nyetshul		
15) Druk Yoedzar		
16) Druk Melong		
17) GyalchiSharshog		
18) Kuensel		
19) The Bhutanese		
20) The Journalist		
21) Local cable TV		
22) International TV		
23) Internet		
24) Advertising		
25) Bhutanese magazines		
26) International Newspapers/magazines		

F. MEDIA AND DEMOCRACY

1) Which are the top 3 modes you use to engage in discussions about democracy and politics?

1.	Live call-in to radio	4.	SMS and phone calls
2.	Live-call in to TV programme	5.	Business and social meetings
3.	Facebook, internet chats, blogs and forums	6.	Letters to newspapers and magazines
		7.	Others (specify): _____
		8.	Do not engage

☐
☐
☐

2) Is Bhutanese media doing enough to educate Bhutanese on democracy?

     1. Yes   2. No   3. Don't know   ☐

3) Do media provide sufficient information about democracy?

     1. Yes   2. No   3. Don't know   ☐

4) Do media provide sufficient platforms for you to engage in discussions?

     1. Yes   2. No   3. Don't know   ☐

Media type	5) Which 3 top-most media that you see, hear, read influence your _____? 1. Yes 2. No 3. Don't know			
	Decision on choosing your elected representative?	Participation in public discourse?	Opinion on political parties/candidates?	Sense of duty as a citizen?
Bhutanese Radio				
Bhutanese TV				
Indian TV				
Foreign TV/newspapers				
Bhutanese newspapers				
Internet/Online				

G. PRESERVATION OF CULTURE

1) Has media contributed significantly to the preservation of local culture?

1. Yes   2. No   3. Don't know (**skip to H**)

2) If no, what can the media do to promote local culture?

1. Include more local religious programmes
2. Local dramas, music and dance programmes
3. Include more local chat shows, documentaries and news features

4. Decrease foreign channels
5. Diversity in customs and traditions
6. Promote local languages/dialects
7. Others (specify)_____

H. RADIO SPECIFICS (If no radio, skip to I)

1) Which radio station to you mostly listen to?

1. BBS 2. Kuzoo FM 3. Centennial FM 4. Radio Valley 5. Radio High

6. Radio Waves   7. Others (specify): _____ 8. Don't listen (**skip to I**)

2) Where do you listen to radio most?

1. At home
2. In the car
3. At work

4. On the move
5. Others (specify): _____

3) What do you use for listening to radio?

1. Radio set   2. Mobile phones   3. Computer

4. TV   5. Others (specify)

4) Did listening to radio have any changes in your life?

1. Yes   2. No   3. Don't know

5) If yes, in what ways?

1. Get knowledge and skills 2. Receive news   3. Keeps entertained

4. Get in touch with friends and families   5. Others (specify): _____

Radio content

Questions	7) Listen	8) Stations
Programmes (if survey is outside Thimphu, skip Centennial Radio, Radio Valley, Radio High and Radio Waves) 6) Which are the top 3 radio programmes you listen to?	When you listen to radio, how much attention do you pay to the programme you selected? 1.　A great deal 2.　Some 3.　A little 4.　None (if none, skip to next programme type)	When you listen to the programmes, which station are you most likely to pay attention to? 1.　BBS Radio 2.　Kuzoo FM 3.　Radio Valley 4.　Radio High 5.　Centennial Radio 6.　Radio Waves 7.　International radio stations (specify):_____
	Select and put code below	Select and put code below
1.　News		
2.　Live-call in/request		
3.　Music		
4.　Children's		
5.　Religious		
6.　Health		
7.　Agriculture		
8.　Environmental		
9.　Cultural		
10.　Education		
11.　Politics		
12.　Advertisement		
13.　Others (specify): _____		

I.　TELEVISION SPECIFICS (If no TV, skip to J)

Television content:

1) Whom do you pay your TV rental to?

　1. Local Cable Operator　　　　2. Agent in India

　3. Don't pay, but watch in neighbour's house　4. Watch but don't pay

　5. Don't have TV and don't watch (**skip to J**)

2) How many TV sets do you have in your household?_____ TV sets

3) Which top 3 TV programmes do you watch? (Select and write the code against the programme)

Questions	4)	5)
Programmes	When you watch TV, how much attention do you pay to these programmes? 1. A great deal 2. Some 3. A little 4. none	When you watch these programmes, which TV stations are you most likely to pay attention to? 1. BBS TV 1 2. BBS TV 2 3. Local cable TV 4. Indian TV 5. International TV
1. News		
2. Live-call in/request		
3. Talk shows		
4. Music		
5. Children's		
6. Religious		
7. Culture		
8. Health		
9. Agriculture		
10. Business		
11. Politics		
12. Advertisement		
13. Cartoons		
14. Movies		
15. Nature/adventure		
16. Comedy		
17. Serials		
18. Sports		
19. Reality shows		
20. Others: _____		

Time use. *With more media available in Bhutan, we would like to know how media affect your use of time. As I mention the types of media, please tell me how use of the media has affected your time for work, socializing, prayers, and your bedtime.*

Questions	6) Does watching the following TV programmes make you __			
Media type	1. Yes 2. No 3. Don't know			
	have less time for work?	have less time for prayer/offering?	have less time for friend/socializing?	stay up late at night?
1) Bhutanese TV				
2) Indian TV				
3) Other foreign TV				

7) Who do you mostly watch TV with?
    1. Alone   3. Friends
    2. Family   4. Others (specify):_____

8)   Who in your household usually decides what to watch on TV?
          1.   Adult male   4.   Parents
          2.   Adult female   5.   Grandparents
          3.   Children   6.   Others (specify):_____

9)   Does TV impact your behavior?   1. Yes   2. No   3. Don't know

10)   If yes, what kind of behavior does it mostly impact on?
          1.   Change in dress   3.   Change towards becoming violent and
          2.   Change in style of speaking   rebellious
                                        4.   Others (specify):_____

11)   What country's culture do you view most on TV?
          1.   Bhutanese   3.   Western
          2.   Indian   4.   Korean
                            5.   Others (specify):_____

12)   How many hours on average do your children spend watching TV per day?_____ hours/day (**If no children, skip to J**)

13)   What impact TV had on your children (up to 18 years) or yourself if you are a teenager?

          1.   Affected school work   6.   Made them imitate fashion type
          2.   Affected sports/outdoor   7.   Made them want to consume more/become
              activities   more materialistic
          3.   Given them more   8.   Made them read less
              exposure/confidence   9.   Not noticed any impact
          4.   Made them better informed 10.   Others (specify):_____
              about Bhutan
          5.   Made them better informed
              about other countries

14)   How do you set limits or guidelines for TV watching for your children?
          1.   No limit   4.   Only with adults
          2.   Time limits   5.   Weekends only
          3.   Only certain channels   6.   After homework only
                             7.   Other (specify):_____

15)   Why do you let your children watch TV?
          1.   To learn   3.   To keep them occupied/quiet
          2.   To be entertained   4.   Others (specify):_____

J.   MOBILE PHONE SPECIFICS (If no mobile phone, skip to K)

1)   How many household members use mobile phones? _____ persons.

Questions	2)
Mobile uses	For what do you use your mobile? 1. Yes 2. No
1) Talking	
2) SMS	
3) MMS	
4) Listening to radio	
5) Listening to music	
6) Viewing videos	
7) Internet	
8) Playing games	
9) Taking photos and video	
10) Listening to news	
11) Others (specify):_____	

3)   Have the use of mobile phone impacted your marital or personal relationship in life?
       1. Yes   2. No   3. Don't know

4)   If yes, in what ways?
       1. Got married/relationship   2. Got separated   3. Led to misunderstanding
       4. No impact   5. Others (specify):_____

K.   PRINT MEDIA SPECIFICS (If cannot read, skip to L)

1)   In which language do you mostly prefer to read?
       1.   Do not read   3.   English
       2.   Dzongkha   4.   Lhotsamkha
                                      5.   Others (specify): _____

2)   Which top 3 types of materials, do you like to read?
       1.   Academic books   6.   Women's magazines
       2.   Novels (fiction)   7.   Official documents
       3.   Religious texts   8.   Newspapers
       4.   Comics   9.   Books
       5.   Entertainment or fashion 10. Sport magazines
            magazines   11. Others (specify):_____

3)   What do you think of the prices of Bhutanese newspapers?
       1. Expensive   2. Affordable   3. Cheap   4. Don't know

4)   What do you think of the prices of Bhutanese magazines?
       1.   Expensive   2.   Affordable   3.   Cheap   4. Don't know

5)   What do you think of the prices of books by Bhutanese authors?
       1. Expensive   2.   Affordable   3.   Cheap   4. Don't know

Newspaper content

6) Questions	7) Read	8) Preferred paper
Which are the top 3 sections in newspapers you like to read most? (Circle the sections that apply in table below)	When you read newspapers how much attention do you pay to the following sections/contents? 1. A great deal 2. A little 3. Some 4. None	When you read the following sections which newspaper are you most likely to pay attention to? 1. Bhutan Observer 2. Bhutan Times 3. Bhutan Today 4. Business Bhutan 5. Bhutan Youth 6. Druk Melong 7. Druk Nyetshul 8. Druk Yoedzer 9. Gyalchi Sharshog 10. Kuensel 11. The Bhutanese 12. The Journalist 13. International paper
	Read	Preferred paper
1) News		
2) Editorials/opinions		
3) Leisure/literacy		
4) Letters to the Editor		
5) Advertisement		
6) Newspaper supplements		
7) Religious matters		
8) Politics		
9) Sports		
10) Pictures		
11) Classifieds		
12) Front page		
13) Others(specify)_____		

9) How have you used the information (mention 3 most common ways)?

1. Inquiry with advertisers
2. Wrote letters top editor
3. Submitted bids/tenders
4. Bought items advertised
5. Buy/Sell items advertised
6. Responded to administrative announcements
7. Applied for jobs and vacancies
8. Others (specify): _____
9. Didn't use the information

10) How many persons do you share your newspaper with? _____persons

L.   FILM SPECIFICS

1) Where do you watch your Bhutanese movies?
    1. Theatre   2. Home   3. On the move   4. Office
    5. Others (specify): _____ 6. Don't watch (**skip to M**)

2) Which movies do you prefer the most?

1.	Bhutanese films	4. Korean films
2.	Hindi films	5. No preference
3.	Western films	6. Others
		7. Others (specify): _____

For the features mentioned below, rate accordingly as per question 3)	3) How would you rate the quality of Bhutanese movies you have watched?
	1. Very good 3. Poor 2. Good 4. Don't know
1) Direction	
2) Acting	
3) Cinematography	
4) Editing	
5) Music	

4) What changes has film brought about for you?

    1. Derived pleasure in free time
    2. Learned new songs
    3. Learned new fashions
    4. Less time for reading
    5. Learnt customs, values, and languages
    6. Addicted to watching too many films
    7. Less time for family
    8. Less time for exercise
    9. Other changes (specify): _____
    10. No changes

5) How many times do you watch Bhutanese movies in a month?

    1. Once   2. 2 – 3 times   3. More than 3 times

6) What do you think of the price of a Bhutanese movie ticket?

    1. Expensive   2. Affordable   3. Cheap   4. Don't know

M. INTERNET USE SPECIFICS

1) Do you have access to Internet? (**If no, end interview**)

2) If yes, where do you access the internet?

1. At home	3. At internet café
2. At office	4. On the move
	5. Others (specify): _____

Questions	4)	5)	6)
Internet sites 3) For what do you access internet?	How often do you access internet? 1. Daily 2. 2-3 times a week 3. Once a week 4. A few times a month 5. Never (**if 5, skip questions 5) and 6)**)	Is the content believable/trustworthy? 1. All of the time 2. Most of the time 3. Some of the time 4. Very little of the time 5. None of the time	Why do you visit these sites? 1. Research 2. News 3. Chatting 4. Advertisement 5. Communication 6. Gaming 7. Shopping 8. Others (specify): ____
1. Email			
2. Chat (Windows Messaging etc.)			
3. Radio sites - local			
4. Radio sites - international			
5. Blogs			
6. Government/ministry			
7. Newspaper sites - local			
8. Newspaper sites - international			
9. Social Networking (Facebook, etc.)			
10. Music downloads			
11. Business			
12. Online games			
13. Porn sites			
14. Others (specify): ___			

7) What main impact has internet use created?

1. Gain knowledge	5. Access to online discussions
2. File sharing	6. Addiction to undesirable websites
3. Could secure business deal	9. Affects work efficiency/productivity
4. Social networking	10. Saves time
	11. Others (specify)_____

Thank you for sharing your views with us.

TASHI DELEK

Annexure 3: Focus Group Discussion List

1. Media CEOs and senior management
2. Journalists / Members of the Journalists Association of Bhutan
3. National Council Members
4. National Assembly Members
5. Media Focal Persons and PPD Heads
6. Civil Society and Non-Governmental Organizations
7. Constitutional Bodies
8. Academia
9. Youth
10. Farmers and housewives
11. Students and children
12. Gewog administration officials
13. Dzongkhag administration officials
14. Civil servants
15. ICT and media training institutes
16. Internet Service Providers
17. Corporate employees

Annexure 4: In-Depth Interview List

1. Lyonpo Namgay Penjore, Chairperson, National Council of Bhutan
2. Lyonpo Nandalal Rai, Minister, Ministry of Information and Communications
3. Lyonpo Dorji Wangdi, Minister, Ministry of Labour and Human Resources
4. Lyonpo Thakur Singh Powdyel, Minister, Ministry of Education
5. Sonam Phuntsho, Director, Bhutan InfoComm and Media Authority
6. Phala Dorji, Director General, Construction Development Board
7. Tashi Tshering, Managing Director, Tashi InfoComm Limited
8. Nidup Dorji, CEO, Bhutan Telecom Limited
9. Thinley Dorji, Managing Director, Bhutan Broadcasting Service Corporation
10. Chencho Tshering, Chairman, Board of Directors, Bhutan Media Foundation
11. Karma Tshering, Director, Royal Institute of Management
12. Kincho Tshering, Kuzoo FM
13. Dorji Wangchuk, Director, Royal Office for Media
14. Tashi Wangmo, Member of Parliament, National Council of Bhutan
15. Lekey Dorji, CEO, LD & Associates
16. Tshering Cigay Dorji, COO, Thimphu TechPark Private Limited
17. Thuji Yonten, Associate Director, Druk Holding & Investments
18. Minjur Dorji, Executive Secretary, Thimphu Thromde
19. Lam Rinchenla, Ex-Lam Neten, Zhemgang
20. Pushpa Chhetri, Director, Bhutan Media and Communications Institute
21. Sonam Tobgay, DMD, Bhutan National Bank Limited