

EXECUTIVE SUMMARY

Media penetration in India has seen enormous progress in the recent years with advancements in technology and coverage, catering to a wide range of media audience in terms of language, region, religion and content. A robust economic growth, growing literate population and consumer spending power have contributed to an expanding consumer base of various forms of mass media – newspapers, radio and television. The new media such as the internet and mobile phones have also made significant inroads since the early 2000's. However the outreach is not uniformly distributed as this base is more urban-based and large swathes of rural and remote segments across the country still have no adequate access to any form of media. Two such regions are the North-eastern states and Jammu and Kashmir in the North-western part of the country, most often characterized as regions with impregnable and difficult physical terrain. These states have witnessed a turbulent period due to insurgency, infiltration from neighboring countries and sporadic terror attacks. These factors have negatively impacted the reach of developmental programmes and limited the growth of media as well. The neighboring countries of Nepal, Bhutan, China, Myanmar, Bangladesh and Pakistan border the NE region and the state of J&K. All these neighboring countries have a vibrant media that keep a close watch on India for various reasons.

In order to assess the reach and impact of national and cross border media, these two regions are the focus of the present study. The media under survey were local and national newspapers, national radio (All India Radio), national TV (Doordarshan) and foreign channels like Arirang (Korea), Pakistan TV (Pakistan) and Bangladesh TV (Bangladesh). Media penetration was assessed in 7 selected states - Assam, Nagaland, Tripura, Arunachal Pradesh, Mizoram and Manipur in the North Eastern region and J&K (Srinagar, Leh and Jammu) in the North-West. The study sought to assess people's choice and use of mass media, preferences for types of programmes and their influence on the local culture and society.

The specific objectives were to:

- i. explore the region-wise reach of National and local media and choice of programme content,
- ii. assess the penetration of Cross Border Media and differences in its use based on factors like gender, age and education,
- iii. discuss the extent of coordination between AIR and DD stations in NE and J&K region and ascertain the scope for increasing the effectiveness of Government media especially Television and Radio.

In total, 9 districts and 7 states were selected as the field sites in NE and J&K region. These field sites were representative of 2 distinct regions: the Northeastern and the North-western part of the country. Being major cities in their respective region, these sites also had the advantage of availing new developments in media technology.

A sample survey was conducted in the 7 states of NE region and 3 regions in J&K state by selecting a district each from these areas, the state capitals in NE states and the regional headquarters in J&K. A sample of 2000 respondents was selected for the survey (200 respondents from 10 districts) which comprised of an equal number of urban and rural respondents. Research tools, comprising of questionnaires and In-depth interviews specially designed to meet the objectives of the study, were administered. The descriptive analysis was used to analyze the data which was tabulated with frequency distribution. Focus Group Discussions were conducted with the AIR and DD officials using structured FGD guidelines.

Major Findings of the Study:

- I (a) An assessment of mass media penetration in the NE and J&K regions, such as TV, Radio, Newspaper, Magazines and New media like internet and mobiles was done on the basis of access, frequency of use and preference for

programme content. This provided a picture of differences in penetration, use and preference of mass media among NE states and the three regions of Jammu, Srinagar and Leh of J&K.

I (b) Penetration of Cross Border Media:

Exposure to CBM

In all the selected states, 39.1% (781/2000) respondents were **exposed**¹ to some form of cross border media, which included TV, Radio, newspaper and magazines.

1. Among the exposed, more males (52.2%) than females (35.7%) were accessing media for news.
2. Exposure to cross-border mass media varied from state to state in the same region. A large number of people in Mizoram (84.5%) were exposed to at least one or more media whereas in other states the media exposure ranged from 59.0% in Manipur, 44.5% in Srinagar and 42.5% in Nagaland to a minimum of 15.1% in Tripura and 11.5% in Jammu.
3. Highest proportion of exposure to cross border media was through TV (38.5%). TV channels and programmes from Korea, Bangladesh, Indonesia, Nepal, Pakistan, and Afghanistan were viewed and among them, Arirang TV channel (187) of Korea was the most popular. Bangladesh TV Channel (96), Nepal TV (26), PTV of Pakistan (59), QTV (46), Al Jazeera (9), Peace TV (11) etc were some other Cross Border TV channels viewed.

Quality of programmes:

4. Visual clarity and good reception (15.6%) was the major reason for accessing cross border TV and Radio.

Clarity of TV visuals was an important reason among the TV viewers in Mizoram (42.0%), Nagaland (35.1%) and Manipur (26.5%)

¹ The term 'Exposed' has been used for those accessing/ using any one or up to four Cross border media (TV, Radio, Newspaper and Magazine)

as compared to Cultural similarity mentioned by the exposed in Manipur (20.0%), Nagaland (17.5%) and Srinagar (16.5%).

5. In Srinagar the most important reason for preference of CBM was cultural similarity, easy accessibility and familiarity with the language. There was a perception among the viewers that Cross Border Media supported the Kashmiri struggle for freedom which made it more popular. Besides, a perception that people across the border were their 'brothers and sisters' and they 'knew more about Islam or Quran' made a psychological bonding with the CBM as well'.

II (a) **Penetration of National Media:**

Out of the total sample of 2000 respondents in all the regions, majority (1984) were using at least one form of media (Media covered were TV, Radio and Newspaper) which indicated a strong presence of media and its use in these states. An assessment of the effectiveness of media showed that majority of people (78.8%) found TV 'very effective' in imparting information and in educating masses. Majority of people (93%) in Tripura and half the people (50%) in Manipur held the same opinion for TV programmes.

Making a choice between the foreign (satellite channels and Cross Border Media) and national media, people found that the National media provided more up-to-date information than the foreign media. However, among the internet users, the foreign news portals/web portals provided latest information than the Indian internet sites.

II (b)

TV Viewership

TV was viewed by 92.8% of the population surveyed thereby making it the most popular mass medium among all other media. Access to TV channels was largely through Cable connection (69.4%), followed by the Direct to Home service (15.3%). Among all states Mizoram was the leading state with 96.8% cable viewers followed by Jammu (91.6%) in the J&K region. DTH

had gained a ground with 21.3% subscribers in J&K as compared to 11.5% NE region.

- **DD Viewers**

Out of 1855 TV viewers among the surveyed population, 1223 watched DD, with Manipur having most number of DD viewers (95.9%) followed by Leh, Tripura and Mizoram. From the J&K region, Jammu had the lowest number of 32.4% DD viewers and Arunachal Pradesh in the NE region had a low of 47.4% DD viewers.

- **Time spent on DD Programmes**

Out of the total time spent on watching DD channels, majority of viewers (41.2%) spent less than an hour, followed by 33.4% who watched DD for 1-2 hour and 21.3% who spent 2-4 hours. It is significant that youth consumed more media and it could influence their views and perceptions regarding socio-political issues.

- **Preference for Types of Programmes**

News-based programmes were the first preference among the DD viewers. Majority watched news and current affairs programmes (93.5%), followed by general information based programmes other than news (87.7%).

Radio Listenership

Out of the total sample, 68.2% listened to Radio, with some states like Manipur (99.0%), Srinagar (94.0%) and Leh (92.0%) having largest segment of radio listeners followed by Assam (72.0%), Tripura and Jammu (67.0%). However, radio listener ship was less than 50% in Mizoram and only 25% listened to radio in Arunachal Pradesh.

- **Time and Duration**

Evening time was the most preferred slot and time spent was more than 2 hours during that time. 33.1% preferred to listen to radio during late evening hours followed by 30% who liked to listen during morning hours and 25% who preferred listening during the day time.

- **Type of Programmes**

In both regions, radio was tuned in for news/ current affairs programmes by as high as 93.4% in NE and 91% in J&K. Listenership of AIR programmes was high (81.7%) though more listeners tuned to FM channels and for longer duration.

Newspaper Reading Habits

The state wise distribution of newspaper readership showed higher newspaper reading habits in states of Nagaland, Mizoram, Meghalaya and Manipur wherein more than 90% respondents read newspaper. Lesser proportion (80-90%) in Srinagar, Assam, and Tripura read newspapers whereas in Leh only half the people (52%) read newspapers. People in NE region were more comfortable with the use of English as the language of the newspaper.

III (a) Rural and Urban Differentials in Media Use:

In J&K the number of TV users was largely in urban areas. Radio listenership was concentrated in rural areas in both the regions (J&K and NE) whereas newspapers were read more in the urban areas than in rural areas, though this gap in newspaper readership was much wider in J&K. Exceptions to this trend were states like Nagaland, Tripura and Srinagar, where newspaper readership in rural area was high.

(b) Gender Differentials in Media Use:

Across the states more men watched television, listened to radio and read the newspaper. The trend reiterates the national pattern of higher access to media by men than women with wider disparity in Arunachal Pradesh, Manipur and Jammu Division in J&K state.

Manipur had the highest number of male radio listeners and TV viewers. Nagaland had the higher number of male newspaper readers; Srinagar had higher number of women TV viewers and radio listeners; in contrast Mizoram had the highest number of women newspaper readers.

(c) **Income Differentials in Media Use:**

A composite picture of NE showed that majority of the people from the middle income group were inclined to watch more TV & read newspapers while those in the lower income group used more of radio.

(d) **Age and Education Differentials in Media Use:**

The younger age group (20-29) was the primary user of the three media (Radio, TV and Newspaper) across the states and those in 30-39 age group were the second largest group in use of media. Those with higher education (graduation and above) were the key consumers of all the three major media (Radio, TV and Newspaper). With every increase in level of education, from primary to high school and to graduation, the use of media (TV, Radio, Newspaper) showed a corresponding increase. Hence, there is a positive correlation between media use and education, especially in the case of Newspaper readership.

(e) **Media Use by Religion**

The use of media by people belonging to different religions or faiths indicated that in Arunachal Pradesh and Mizoram, Christians were the major users of media. In Srinagar largest numbers of media users especially of TV were Muslims (97.8%), whereas, Hindus were found using various media in Assam, Tripura and Manipur. In Arunachal Pradesh and Manipur, media use among the tribal groups varied from 20.6% to 10.2% for TV, 22% and 10.6% for Radio and 25.8% and 10.2% for newspaper, respectively.

IV **Impact of Media:**

A maximum of 61.7% in NE and 57.6% in J&K were of the opinion that the lifestyles of the present generation had become westernized due to the exposure to such media programmes. On the issue of gender equality, 55.3% in J&K and 45.3% in NE mentioned that media had a role in encouraging girls' education with more girls getting educated in schools. Similarly, 43,4%

in NE and 45.7% in J&K were of the opinion that media created awareness, positively impacted women's empowerment and encouraged women to take up professional jobs. 44% in J&K and 40% in the NE believed that a positive media exposure boosted tourism industry.

V Suggestions for Improving Programme Quality and Content

It was suggested by the media users that the news content of TV, Radio and Newspapers needed improvement and quality enhancement in terms of up-to-date coverage of actual incidents and events after thorough research. News must be credible and clear to avoid any exaggerated stance.

It was also suggested that the entertainment programmes should provide and project real-life situations rather than making them purely film-based. A limited numbers of programmes that projected the actual social and cultural issues were produced. The viewers felt that the programmes usually portrayed one-sided issues and hence needed more analysis, explanation and evaluation. Time for such issue-based programmes must be extended and made participatory i.e. having representation of people from different streams to make the programme more effective.

Economic issues were superficially and briefly dealt with, except only when some case of corruption was revealed. The cause of economic crisis in NE region such as lack of employment opportunities needed more attention. Mainstream media generally covered 'economic issues of national interest that were often corporate industry oriented or that which interested the upper class.' The economic difficulties of the common man needed more space in media.

VI Conclusion

The study highlighted certain trends in media usage and access in these two regions:

- ❖ People's access to any type of media was significantly high although there is a skewed ration in favour of males who form a larger consumer base for any media type. This could be due to the fact that literacy rates among males are higher and women, usually limited by social and economic means, have limited access.
- ❖ Education is a key determinant that influenced media access in all the surveyed states. Higher the education levels, higher the level of media consumption. This could explain why a higher percentage of media usage is accounted for in urban areas and amongst the youth.
- ❖ The rural-urban differential is more pronounced in the case of radio listenership with a higher concentration in the rural areas. Another interesting correlation is with the income differentials – lower income groups accounting for more listenership while higher income groups accounted for more TV viewership and newspaper readership.
- ❖ The impact of media on the social and cultural lives of the people is noteworthy. This aspect could be capitalized upon to improve the existing programmes, devise new channels through which outreach can be expanded to include local needs and sensitivities.

