

Media Impact Study 2003

Section A : Impact Study

Section B : Survey Findings

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Section A: Impact Study

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Summary of information/ communication indicators - Bhutan 2003

	Number	Remarks
Broadcast		
Radio sets	37,000 (1997) up to 250,000 (2000)	BBS and RTM 2000 document. Figures are guesstimates
FM radio sets distributed	1,600 (2000)	BBS estimates
Televisions	35,000	BBS estimates
Cable TV operators	33	BCA figures. Cable channels range from 8 to 45
Cable subscribers	15,000 estimate	BCA estimate/ study although actual figures are expected to be higher
Internet		
Computers nationwide	About 8,000-10,000	DIT/ Bhutan Telecom estimates
Druknet dial-up users	1,900 with an estimated 5,000 users	Sept. 2003 figures, Druknet Most of the users are from Thimphu and Phuentsholing
Druknet leased lines	26	
Computers on leased lines	Approx. 2,500	Druknet estimates
Internet users	0.73 %	
Internet cafes	12	7 in Thimphu
IT companies	16	
IT training institutes	18	
No. of websites on Bhutan in English	200	Druknet hosts 54 websites
Newspaper/publications		
Newspaper Kuensel circulation	20,000	Readership 1:14
Journals	8	Source: Ministries of Education, Health, Agriculture, CBS
Contemporary books by Bhutanese	207	Centre for Bhutan Studies bibliography. Most of the titles are publications from the education dept.
Film and Music		
Cinemas	8	Thimphu X2, Phuentsholing X2, Samdrup Jongkhar X1, Samtse X1 , Gomtu X1, Geylephug X1
Audio -Visual production companies.	42	Mostly based in Thimphu
Music distributors	Approx. 55	Estimates from music producers
Telephones		
Telephone users	21,600	50% of phone subscriptions are in Thimphu
Tele -density	2.9%	(Thimphu, Paro, Phuentsholing = 65% of usage) If 3 major towns excluded, the teledensity would be 1.39%. Source: E-readiness report
General data		
Literacy rate	54 %	Women's literacy is estimated at 28% (Source: RGoB/UNDP)
Power coverage	35 %	Bhutan Power Corporation expects to electrify 42% of population by 2007
Population	690,000	RGoB

Executive Summary

Chapter 1: Introduction

As the Bhutanese government plans the development of the media in Bhutan, it is critical for decision makers, media professionals, and the audience to understand and develop the right responses to the media's pervasive influences. The government has already recognised the need for policy and direction, for legislation and regulations. It promises access to information as a right of the citizen and has, therefore, recognised the urgency of ensuring the media's healthy growth and role.

To understand the future, we need to look at the past. It is also important to draw from the global and regional media experience and trends. Today, as international research indicates, communication is not a tool for social control but it is integral to socio-cultural change. For Bhutan it is also important to be aware of the impact of the media in neighbouring countries since the media is a trans-border experience. It is vital, however, that Bhutan draws on its own experience in the past four decades of modernisation to plan for the future.

In this scenario, we chart the progress and development of the media in Bhutan and identify key issues that need attention. This study focuses on the impact of traditional mass media - primarily print, broadcast, and film/music - as well as the new multi-media – Internet. It proposes a number of recommendations drawn from an analysis of Bhutan's experience with the media. The recommendations are also placed in a global perspective, the experiences of other countries that are very relevant to Bhutan as it joins the information society.

Chapter 2: Background

Bhutan is in a unique position with distinct characteristics that makes the planning of media development both complex and exciting.

The new media environment has opened up possibilities that need to be explored and tapped. The challenge for the government is to direct professional growth and development and yet be sensitive to Bhutan's unique goals. For this there is a critical need for clear media policies and legislation to regulate (not censor) and develop the Bhutanese media.

This study, therefore, takes an in depth look at the media experience within the country in the context of global trends and to facilitate a sound direction for the development of the Bhutanese media. The study goes beyond the direct impact of the traditional and new media to place Bhutan's media experience in the perspective of its overall development. How can Bhutan's media contribute to Gross National Happiness ?

Chapter 3: Methodology

1. *Objectives of the study*

The overall aim of this study is to find out the impact of media on Bhutanese society.

- Provide a situation analysis of media development in Bhutan. It will take a look at the institutions involved, the key players, and the audience.
- Provide an understanding of the impact of media on people—socio-cultural implications, family/social relationships, lifestyle, and the way people have changed the use of their time for media consumption.
- Give a perspective of how people use the media, what they regard as the role of the media, their ability to pay for media services.
- Provide a perspective on future trends in media development and lessons for policy-makers and media institutions for the development of media policies and legislations.
- Provide an insight into the opportunities provided by the convergence of technology and, eventually, of content, in a global context.
- Look at the sustainability of the media and the role of government subsidy.

Current media research trends guide the methodology for this study which combines qualitative and quantitative research approaches. These include:

- In-depth interviews with policy and decision makers, stakeholders, key informants.
- Survey of the population representing various regions of Bhutan
- Focus group discussions
- Review of surveys, studies, articles, and relevant legislation.
- Case studies

The survey focused on separate regions to obtain information, views, and feedback from a cross section of society. The media users were broadly placed in the following towns and villages:

- Five districts: Bumthang (central), Geylephug (south), Thimphu (west), Trashigang (east), Chukha (south) to represent the major regions of Bhutan
- The smaller urban towns of all the districts including a major urban centre, Phuentsholing.

Interviews and focus group discussions were also conducted with people from across the country including remote areas like Gasa, Laya, Khalikhola, Shemgang, Lhuentse, Merak Sakten and Kanglung. Views from selected case studies are presented in Case study 1,2,3.(see case studies)

Chapter 4: Media policy, legislation and government structure

This chapter introduces Bhutan's media policy, key legislations and the government structure responsible for media development.

Media Policy

In an era of rapid political change, with the Constitution of the kingdom of Bhutan to be enacted, the main thrust of Bhutan's media policy is the development of a free and responsible press in a competitive environment.

In the 2000 RTM held in Thimphu, the government declared its recognition of media as a tool for Bhutan to leapfrog into the 21st century and to help form a society enriched by information, knowledge and skills.

In July, 2003, the Ministry of Communications drafted a media policy which states that "The royal government of Bhutan recognises the role that the Bhutanese media will have to play in national development in a changing environment. Following the initiatives taken by His Majesty the Druk Gyalpo, the royal government emphasises that the media must continue to grow in professionalism to fulfill its role to "Inform, Educate, and Entertain".

With the establishment of a written Constitution it is necessary that the Bhutanese media is able to function independently and responsibly, upholding national interests and the standards of tolerance, decency and sensitivity required for the healthy growth of a stable society and also to keep up with technological trends and developments in the international media.

Legislation and existing regulations

In anticipation of the Constitution that will encourage the growth of private media, the Ministry of Information and Communication is preparing legislation for print, broadcast, and film. This is expected to be submitted to the 2004 session of the National Assembly in 2004 for endorsement. It is also expected that, following global media trends, the three media and ICT will be converged at a relevant stage.

The major legislation and regulations that guide the development of media include:

- Bhutan Telecommunications Act 1999
 - Copyrights Act 2000
 - ICT Act (draft , 2003)
 - Legal Deposit Act (2002)
 - Regulation of Cable Operators
 - Rules and Regulation for Movie Halls and Video Parlours
 - Bhutan filming regulations 1995
-

Government Structure

The Ministry of Information and Communications

The ministry, established in June, 2003, is mandated to steer the development of the information and communication sector including the traditional and new media.

Information and Media Authority

This authority, recently established, will research, plan, and support the growth of the media. It initiates research and the drafting of policy, regulation, and legislation for the ministry.

National Information Technology Authority

Formerly known as the DIT, this authority looks after all aspects of the development of information technology. It initiates drafting of ICT policy and plans affecting all sectors the government.

Bhutan Communications Authority

BCA will be the regulatory authority for all the ICT and media sectors.

Bhutan Telecom

As a public sector corporation, BT is responsible for telecommunication infrastructure. BT also administers the internet service provider Druknet and the new mobile telephone unit.

Media Advisory Board

Established in 2001, the seven member advisory board met just once and is practically a defunct organization.

The Film and TV Review Board

All Bhutanese films are reviewed by the Film and TV Review Board before they are screened for the public. The board functions without written regulations and observes sensitivities that are considered generally acceptable for the public.

Chapter 5: Media in Bhutan

Bhutan's media policy aims at the development of a free and responsible press in a competitive environment. The government's initiative to develop the Bhutanese media must be viewed in the perspective of a predominantly rural society where the oral tradition is still very strong.

The concept of the media, as a player in the growth of a modern society began in the mid 1980s, with the establishment of the first Bhutanese newspaper, Kuensel, and the BBS. In the late 1990s, as the ICT revolution touched the country, the electronic media was introduced. The global convergence of information technology is also a gradual but visible trend in the Bhutanese media.

Media development in Bhutan has been a part of the process of planned development. The government made the initial investments, including the establishment of the national newspaper and broadcasting station. It laid the groundwork for electronic infrastructure, with the establishment of the telecommunication network and the distribution of power.

As the 1992 *kasho* clearly indicates, it is by policy that the media was established and then privatised. The initial emphasis was placed on infrastructure development and the training of media professionals. The next step was the sustainability of the media as independent organisations. Today it is the need for legislation.

With a weak resource base, the government has sought donor funding for the Bhutanese media. UNDP and other UN agencies supported the national newspaper and broadcasting station. In the 1990s, DANIDA was the main funding agency for the media.

Chapter five traces the development of the radio, TV, Internet and film and music in Bhutan.

Chapter 6: Bhutan in a global perspective – the new information, communication environment.

The right to access and participation, freedom of expression and the development of information infrastructures are pertinent questions facing the information society.

These issues are vital to Bhutan in the context of current socio-economic and political changes. The concept of freedom of speech and the role of the media are critical issues as the country builds a uniquely democratic system of governance. The responsibility of the media grows proportionately to the increasing public discourse in the Bhutanese media, particularly on the Internet. This public discourse is becoming an increasing phenomenon.

Just as the government promises access to information as a right of every citizen and the Constitution is expected to include freedom of expression, it is necessary that the technological and legal structures are in place. Media access and information infrastructure needs to be more central to development planning in Bhutan not just to overcome the country's geographical barriers but as an active player in the changes.

Media and IT, which cuts across all sectors of development, are recognized as the “most powerful instruments for the penetration of global culture and the values of the global market place”¹. The government acknowledges that the challenge for Bhutan today is how to take advantage of globalisation and the information revolution and yet preserve and promote essential elements of Bhutan’s culture and traditions in order to enhance our spiritual well-being (ibid).

Communications plays a central role in accelerating the process of globalisation. Globalisation has freed the flow of information and brought about a more liberal, more competitive environment. In Bhutan, improvements in communications technology has helped the country join the global information society. But we find ourselves carried along by this tidal wave and, like many developing countries, responding helplessly to international trends.

Thus the concern about “media imperialism”. Communication research has shown that globalisation increases an awareness of the local media, particularly as a contrast to the “aerial invasion” from outside. This is what’s happening in Bhutan and the Bhutanese media has come under pressure to improve content, both in terms of quality and quantity. Bhutanese consumers are also demanding greater variety, higher quality and, inevitably, more entertainment.

In Bhutan, the public service obligations of the media – both the traditional and new media – is important for the achievement of Gross National Happiness. Public service must be interpreted at two levels: subsidy of essential services for those who cannot afford them and for the media to provide a professional service to the population. Government and public sector corporations must subsidise infrastructure including power, telecommunications facilities, and the electronic media and ICT services, which are particularly expensive. The media must play the role of the “fourth estate” that is required in a healthy democratic system.

Digital divide

The digital divide is very real for Bhutan which started its development process decades after the rest of the world. The official literacy rate is 54 percent and computer literacy far less. Bhutan has a teledensity of 4% with internet users representing about 0.73% of the population. There are fewer than 10,000 computers in the country. Power has reached just 35 percent of the population. When mobile telephones are used by up to 90 percent of the people in some countries Bhutan Telecom hopes to eventually reach 10,000.

The digital divide is an internal problem, directly related to a number of existing trends, for example, the rural-urban divide, literate-illiterate divide, rich-poor divide, the old-young, and gender divide. Bhutan’s

development has been characterised by the need to balance priorities. When the decentralised planning takes place, ICT will be low on the agenda. As it is, the information sector was allocated two percent of the budget for 2003-2004.

Chapter 7: Situation Analysis

The impact of media on society

This report looks at the actual impact of different media on Bhutanese listeners/viewers/readers and on society as a whole. It identifies changes in the perceptions, values, and life styles of the audience as well as the reactions and responses of media professionals and practitioners. To provide a more comprehensive understanding of the impact of media on society, the assessment in this chapter is done in separate sections: social, cultural, political, and economy.

As a background to help understand the impact, the chapter also examines relevant issues like the access that people have to different media. This is indicated by the infrastructure, equipment, and affordability. Another important trend is the impact of international media trends on the Bhutanese media and, therefore, on the audience. An important trend is developments within the media itself.

Development and growth of the media

Media development in Bhutan reflects the changes taking place in the Bhutanese socio-political and economic systems as well as global trends. There have been several significant milestones that mark media growth:

1. Increasing literacy. As society became more educated, the information sector was a natural priority and thus a demand for the media growth.)
 2. Media made independent of the government in 1992 by royal decree. This autonomy was a boost for media development.
 3. Technology advancements raised the capability of media (Rapid advancement in technology raised the capability of the media in its production processes. This enhanced its sustainability.)
 4. Politics – political reform giving media a new and increasing role, sometimes known as “the fourth estate”. This pressure will increase with change.
 5. Economy – growth in the economy drives media growth. While this is yet to take off, it will be a strong force in future.
-

6. Legislation and policy that seeks to provide information as a right.
7. Globalisation has a direct impact on media development in Bhutan.

As with global trends, Bhutan's media has also had an impact on all areas of Bhutanese life. The study looks at specific impact of the media in detail:

On Social impact it looks at

Lifestyle

Family relations

Values

Sports

Children and youth

On Cultural impact it looks at

Music

Fashion

Language

e-culture

On Political impact it looks at

Media's role

Freedom of expression

Legislation

Changing political values

On Economic impact it looks at

E-business

Employment

Media as a business

Advertising

Consumerism

Chapter 8: The credibility of the media

Overall, the Bhutanese media has a steady audience but the demand is growing. There are mixed reactions to the credibility of the government-owned media (radio, TV, newspaper). The majority of people, or 90 percent of the survey, said they found Bhutanese media believable in general. But we came across other views on closer study and discussion.

For the educated elite, the credibility is very low. For the urban population which has access to other media, the content is inadequate. For the rural population, the access is limited and the people feel unrepresented. For the private media (film, music) the standards are also seen as being generally low among the educated audience because they are seen to be emulating Bollywood. But they are popular among the rural audience.

Many people are unaware of the influence of media content in its varied forms. People are generally not aware that they can play a role in shaping the growth of the media and influencing its role. A majority do not provide feedback although they do have views.

The media professionals themselves feel a growing pressure. Government officials think they are too critical and the people think they are too mild. Reporters often find it difficult to obtain important information from government organisations. There are a number of sensitive areas which the media find difficult to cover.

The role of the media needs to be clearly defined, especially within the changing political landscape. Legislation, including content legislation, must move into place. Legislation must define national interests and sensitivities. For example, Bhutan could adopt Thailand's policy of protecting the sanctity of the King.

In short, the media should play the traditional role of the media known all over the world.

Chapter 9: Recommendations

With Bhutan on the threshold of the information society, the government has turned its attention to the development of the media. What is immediately apparent is that it is a major responsibility, not just for the government but for media professionals, lawmakers, the educated section of the population, and society at large. In the light of the political changes taking place, civil society has a particularly important role to play.

At this juncture the government takes the media into a new era. It will refine policy guidelines and is poised to introduce comprehensive legislation. Its involvement will need to continue as it assumes the role of regulator and to support media growth by updating policy and legislation and supporting infrastructure. All these specific responsibilities would be aimed at ensuring the healthy growth of the media. In response to important changes like the drafting of a Constitution, the government will need to ensure that the media will play a positive role in national development.

It also important to base decisions on research and analysis. Apart from regular audience surveys, studies are needed to understand media effects on children, on youth, to understand the gender representation in media content, and the overall effectiveness of media messages.

Equally important is research into how the media works, what influence they have, and what in turn influences them. Financial sustainability issues also need more study for media development.

This concluding chapter lists a range of recommendations to government, media organisations, the private sector and decision makers. The recommendations cover specific in a number of areas for both the government and media itself:

- Access
- Policy and regulations and the need to promote a supportive environment for media development
- Develop a “Bhutanese” identity in the media
- Governance
- Economy
- Professionalism through training
- Promoting Education and media literacy
- Specific recommendations for the media

Chapter 10: Conclusion

Society is changed by a number of forces like political reformation, economic liberalisation, and social volatility. Globalisation, urbanization, and increasing literacy are new influences on Bhutan. As Bhutanese society evolves this first study on the impact of the media provides an understanding of its role as Bhutan joins the global information society.

The people are enjoying increasing access to the media but there are gaps between the haves and have-nots. Some people have a wide choice of media, especially with the introduction of TV and the Internet. Others, especially in rural areas, do not. But the people want more access to the media and it is important to provide this, particularly for youth and the rural population.

The government - through the right policies, regulations, legislation - and the media - through professionalism - must reinforce the national priorities and meet the aspirations of the people. To do this it is important to acknowledge that, in essence, it is the quality of people that matter and not the quality of equipment and facilities. “E” should not stand for “electronics”, but “empowerment”, “enabling”, “equity”.

It is critical to understand that the media and ICT are not goals in themselves, but means to an end. The information sector is a powerful force, and the media is an effective tool, to help achieve national goals. Ultimately, the success of media and ICT development will be assessed in the achievement of national goals like good governance, employment, and in controlling population, drugs, crime, HIV/AIDS, corruption, and the state of Gross National Happiness itself.

¹ Development Towards Gross National Happiness, November 2000, 7th Round Table meeting with donors, Thimphu., RGoB.

CHAPTER 1

Introduction

The world has plunged into an information revolution and the international community is, in essence, an information society. By UN estimates, the information and media related industry is expected to control most of the world's GDP as it is already doing in the developed countries.

The international society is grappling with critical issues that are emerging with the changes in the media that is largely driven by technology and commercialism. The control of media content by the more powerful nations, implying media imperialism, is a global issue. In South Asia, for example, the pervasiveness of the Indian media is an issue of concern. The digital divide continues to be a divisive force widening the gap between the haves and have-nots.

We are aware that there are wider and deeper implications of opening up a country to the media than we fully understand. Social science is yet to find a comprehensive perspective and is currently able to explain just some aspects of the impact of media on human society. Human nature has proved, time and again, to be vulnerable to popular influences. Countries and governments have repeated the same mistakes. And the media has sometimes weakened, rather than strengthened, society.

As the Bhutanese government plans the development of the media in Bhutan, it is critical for decision makers, media professionals, and the audience to understand and develop the right responses to the media's pervasive influences. The government has already recognized the need for policy and direction, for legislation and regulations. It promises access to information as a right of the citizen and has, therefore, recognized the urgency of ensuring the media's healthy growth and role.

To understand the future, we need to look at the past. It is also important to draw from the global and regional media experience and trends. Today, as international research indicates, communication is not a tool for social control but it is integral to socio-cultural change. For Bhutan it is also important to be aware of the impact of the media in neighbouring countries since the media is a trans-border experience. It is vital, however, that Bhutan draws on its own experience in the past four decades of modernisation to plan for the future. Decision makers also need to view media development increasingly in the context of international relations as many media issues have to be settled in an international arena.

In this scenario, we chart the progress and development of the media in Bhutan and identify key issues that need attention. This study focuses on the impact of traditional mass media - primarily print, broadcast, and film/music - as well as the new multi-media – Internet. Mobile telephony, digital radio telephony and other convergent delivery systems for media and personal messages will be important in the future.

This report proposes a number of recommendations drawn from an analysis of Bhutan's experience with the media. The recommendations are also placed in a global perspective to draw on the experiences of other countries as Bhutan joins the information society.

For Bhutan, the information revolution is information evolution, and the digital divide, a digital opportunity.

CHAPTER 2

Background to Study – perspective of media within Bhutan’s development process

Background of Bhutan’s development

Bhutan is in a unique position with distinct characteristics that makes the planning of media development both complex and exciting.

It is a small society, surrounded by large neighbours and a globalised world where media ownership is becoming restricted to a few organisations and people. The rugged terrain and scattered population makes it difficult and expensive to reach remote communities. It is in an early stage of economic development, yet to lay adequate ICT infrastructure. ICT development demands special skills and resources as Bhutan struggles to bridge major gaps, including the digital divide, with limited funds and manpower. Most important, Bhutan is a farming society in transition. It is largely an oral society without strong literary traditions, thus posing an additional challenge to the information sector.

With a literacy rate of 54 percent, the proportion of literate people in the country of 690,000 is limited. Computer literacy is far less with fewer than 10,000 computers in the country (Source: RGoB). Bhutan has a teledensity of four percent with Internet users representing about 0.73 percent of the population (Source: Dept of Information Technology and Bhutan Telecom). Power has reached just 35 percent of the population. All these factors have direct implications for the development of an active public sphere.

These constraints makes the country extremely vulnerable.

At the same time, Bhutan has many strengths. It has preserved a rich spiritual, cultural, and environmental heritage. It has drawn on the global development experience and followed a unique development path. It has decided to adopt modern technology in a pragmatic strategy to overcome its weaknesses like the shortage of manpower and the disadvantages of being landlocked. Most of all Bhutan has a clear idea of its priorities, symbolised by its development goal: Gross National Happiness.

As a concept, media development is not new to Bhutan’s leaders, planners, and implementers. It represents the delicate balance that has been the essence of the overall development process in the past four decades. But there is a new urgency. The dynamism of technology has already given the people more choice. As a medium for information, education, and entertainment, it represents a force that cannot be controlled. The increase in media choice and availability means that society has to increasingly select and absorb what is available.

Bhutan is drafting a Constitution to be enacted. The freedom guaranteed by a Constitution requires that society and individuals assume new responsibilities. The changing political scenario has already opened up possibilities that need to be explored and tapped.

The challenge for the government is to direct professional growth and development in the overall perview of Bhutan's unique goals. For this there is a critical need for clear media policies and legislation to regulate (not censor) and develop the Bhutanese media. To begin with there is a need for comprehensive research.

This study, therefore, takes an in depth look at the media experience within the country, in the context of global trends, to facilitate a sound direction for the development of the Bhutanese media. It will be a foundation for policy, legislation, and regulations as the new ministry assumes the responsibility for the development of the information and media sector and provide feedback for media professionals.

While there are many social, political, and economic factors that influence change in a country this study focuses on the impact of the media. Developing countries are known to face a number of limitations, including the shortage of resources and clumsy bureaucracies, but an important question is, what are they doing to help themselves ? Bhutan might ask, how can this powerful force contribute to Gross National Happiness ?

CHAPTER 3

The Study and methodology

The overall aim of this study is to find out the impact of media on Bhutanese society.

3.1 Objectives

- Provide a situation analysis of the media and media development in Bhutan. It will take a look at the institutions involved, the key players, and the audience.
- Provide an understanding of the impact of media on people—socio-cultural implications, family/social relationships, lifestyle, and the way people have changed the use of their time for media consumption.
- Give a perspective of how people use the media, what they regard as the role of the media, and their ability to pay for media services.
- Provide a perspective on trends in media development and lessons for policy-makers and media institutions for the development of media policy and legislation.
- Provide an insight into the opportunities provided by the convergence of technology and, eventually, of content in a global context.
- Look at the sustainability of the media and the role of government, including subsidy.

3.2 Methodology

Current media research trends guide the methodology for this study which combines qualitative and quantitative research approaches. These include:

- In-depth interviews with policy and decision makers, stakeholders, key informants.
- Survey of the population representing various regions of Bhutan and all sections of the population.
- Focus group discussions.
- Review of surveys, studies, articles, and relevant legislation.
- Selected case studies.

Target groups

The survey, conducted through written questionnaires, personal and telephone interviews, and focus group discussions, targetted the population in identified sections:

- Urban and rural
 - Educated and illiterate
 - High, medium, and low income
 - Youth and elderly
-

The **survey** focused on separate regions to obtain information, views, and feedback from a cross section of society. The media users were broadly placed in the following towns and villages:

- Five districts: Bumthang (central), Geylephug (south), Thimphu (west), Trashigang (east), Chukha (south) to represent the major regions of Bhutan
- The smaller urban towns of all the districts including a major urban centre, Phuentsholing.

Interviews and focus group discussions were also conducted with people from remote areas in Mongar, Gasa, Laya, Khalikhola, Samdrup Jongkhar, Lhuentse, Merak Sakten and Kanglung. Views of farmers and public servants are presented in three case studies to provide some opinions on the media. (See case studies 1,2,3)

The **in-depth interviews** were conducted with more than 48 key informants. Apart from senior government officials and local leaders, interviews were carried out with media professionals, children, youth, the man in the street, shopkeepers, farmers, the elderly, service providers like the cable operators and many other individuals.

In addition to interviews, the study carried out **rapid assessments of various districts** and held **twenty focus group discussions** with a cross section of people to sample opinions among people served and under-served by media. In the survey areas, additional group discussions were held to provide some comparisons and conclusions. These group discussions enabled the study to ask more probing questions and were instrumental in providing people with the opportunity to express subjective opinions and value judgments on a variety of issues.

Focussed discussions were conducted with the following groups:

- Public — homemakers (men and women), older people
- Children and youth
- Professionals, support staff, teachers, businessmen/women
- Government and corporate officials on use of media in government for information/ news/feedback/ work
- Media professionals (reporters, producers, film makers camera specialists, webmasters)
- Other media practitioners – scriptwriters, songwriters, singers, actors, film producers.

A majority of the people surveyed, interviewed and included in focus groups represent the general public.

NOTE: A special attempt was made to cover the experience and views of media practitioners including journalists, producers, broadcasters, and filmmakers and songwriters. (Annexe 1 and 2 provide the list of interviews and focus group discussions conducted for the study). A full survey report with findings and analysis is included in section B of this report.

CHAPTER 4

Policy, legislation and government structure

4.1 Policy

“Today, as Bhutan enters the age of communications, its priorities are geared to meet the needs and demands of the times. The kingdom has seen a dramatic increase in the literacy rate of the population as a result of the special attention given by the royal government to the education sector. As technological advancement brings the international community closer together, it has also established the infrastructure to modernise and strengthen communication and information links with the rest of the world. It is the policy of the royal government, therefore, to facilitate and encourage the professional growth of the Bhutanese media which must play an important role in all areas of development. Such a role is especially relevant to the national policy of decentralisation which aims to involve all sections of the society in the socio-economic and political development of the kingdom.”

(King Jigme Singye Wangchuck, October 1992)

In an era of rapid political change, with the Constitution of the Kingdom of Bhutan to be enacted, the main thrust of Bhutan’s media policy is the development of a free and responsible press in a competitive environment. ICT and multi-media is a new thrust but the traditional media is still more important for Bhutan because of its greater reach.

In the 2000 Round Table Meeting with development partners held in Thimphu, the government declared its recognition of the opportunity that the media held for Bhutan to “leapfrog into the 21st century and to help form a society enriched by information, knowledge and skills”. The RTM also expressed a broad concern on the “impact of IT and media and the possible negative fallout on the culture and traditions of a society.” It noted the particular constraints faced by the media, in terms of financial sustainability.

Since the government has placed people at the centre of development, (RGoB, February 2003, 8th RTM, Geneva) it has recognised that coordination and cooperation at the dzongkhag and geog levels is as important as the need for co-ordination between agencies at the central level to make decentralisation work smoothly. It, therefore, identifies the need for information dissemination and co-ordination as a priority, especially identification of new roles and responsibilities.

In July, 2003, the Ministry of Communications drafted a media policy which states that “The royal government of Bhutan recognises the

role that the Bhutanese media will have to play in national development in a changing environment. Following the initiatives taken by His Majesty the Druk Gyalpo, the royal government emphasizes that the media must continue to grow in professionalism to fulfill its role to “Inform, Educate, and Entertain”.

With the establishment of a written Constitution it is necessary that the Bhutanese media is able to function independently and responsibly, upholding national interests and the standards of tolerance, decency and sensitivity required for the healthy growth of a stable society and also keep up with the technological trends and developments in the international media.

New media

According to the Department of Information Technology’s IT masperplan, ICT now features in all aspects of Bhutan’s development plans. The government has identified three main objectives in July, 2002:

- To use IT as an integral tool to enhance good governance
- To develop IT and IT enabled export industry to generate employment and income for Bhutan
- To use IT to improve the livelihood of all Bhutanese.

The 2003 RTM document identifies information services and data processing as ICT industries suitable for Bhutan. Existing businesses and financial institutions must be encouraged to exploit ICT and e-commerce to facilitate international trade. To initiate e-commerce possibilities, a Bhutan portal will be created for Bhutanese merchandise and services.

The RGoB’s Vision 2020 document says that, in the field of telecom, future strategies must meet multiple objectives. They must facilitate communication and exchange within the nation through the development of such services as email, Internet and “Intranet”. They must also further improve our contacts with the outside world, making it possible to access the “information highway” that will provide access to the same information and data as those residing in the most technologically advanced nations.

4.2 Legislation and existing regulations

The following Acts partly or directly govern the media:

Bhutan Telecommunications Act 1999

The Bhutan Telecommunications Act was passed to establish Bhutan Telecom as an autonomous corporation. Stemming from this Act is the National Radio Regulations, 1999, to regulate radio communications services in Bhutan.

Copyright Act 2000

With Bhutan joining WIPO/WTO and having passed the Copyright Act, copyright has become an issue of concern. This Act protects literary and artistic works, reproduction, broadcasting and other communication and information services. It also covers the rights of author and performers, producers of sound recording, and broadcasting organisations.

The Copyright Act is not well known in the media industry but has already had some impact, for example, by protecting some artists from losing their songs to businessmen. One private sector case was diverted from court while BBS settled a historic case against a cable operator out of court. A film producer has taken Kuensel to court over a film review. The broadcasting of songs, dramas and the screening of films will become issues needing attention.

The ICT Act

The ICT Act has been drafted and is in discussion by the government. It is expected to provide a broad guideline for the development of ICT infrastructure and content. It will look at ICT as a national need.

Legal Deposit Act

Under this Act, all Bhutanese publishers /producers are required to deposit their publication/production of any material at the National Library and Archives within three months of the publication/production.

Materials published include all materials produced by government, government-owned or related sectors. It also includes private organisations and companies, non-government organisations and individuals who may produce materials for sale and free distribution.

“Printed materials” include books, newspapers, magazines, serials, government publication, maps, charts, tables, drawings, graphic arts, photographs, catalogues and posters produced by printing, lithography, photography, xylograph, duplication or any other similar processes.

“Non-printed materials” include educational cinema, tele-films, documentaries, microfilms, and audio-visual recordings, electronic media (computer software, CD-ROM), braille and any other media containing information.

Media Legislation

In anticipation of the Constitution that will facilitate the growth of private media, the Ministry of Information and Communication is

drafting legislation for print, broadcast, and film. This is expected to be submitted to the 2004 session of the National Assembly in 2004 for endorsement. Media legislation will come with media regulations.

It is also expected that, following global media trends, the three media and ICT will be converged at some stage.

4.3 Other regulations

Bhutan Filming regulations 1995

The Department of Tourism is the sole government authority issuing permits for foreign nationals and companies in Bhutan. The Department enforces the Bhutan Filming Regulations 1995 which applies to all filming activities undertaken within the country by foreign film and television companies. Under the regulations, a filming royalty is payable to the Department of Tourism for all films and documentaries made. The royalty is a progressive tariff that ranges from a minimum of US\$10,000/- for productions up to 30 minutes. The Department has separate terms and conditions for feature and cinematographic films which is decided on an individual basis. The Tourism Department also reserves the right to request the editing of the finished programme if it is “factually wrong, or does not reflect the correct image”.

The following two mechanisms were introduced in the absence of comprehensive legislation. Given that legislation would take time, and developments in the media were overtaking normal social change, these measures were taken to prevent unhealthy upheavals within society.

Regulation of Cable Operators

Cable operators are licensed by the Bhutan Communications Authority. The license outlines guidelines for operation and maintenance, design and construction provisions, and content. The latter describes the obligations of cable operators to be bound by any national code of conduct and other codes of conduct that may be issued by the government. This system will change with the introduction of a Broadcasting Act.

Rules and Regulation for Movie Halls and Video Parlours

These are the latest regulations adopted in 2003. They provide guidelines for the establishment of movie halls and video screening halls and include provisions for monitoring of such facilities.

Publishing

There is currently no publishing regulation, leaving the field open for anyone to publish books and other publications without any requirements. Bhutan's lawbook, the Thrimzhung Chhenmo, has provisions for defamation. Trade regulations prohibit the import of pornographic materials.

4.4 Donor Support

The government has encouraged donor support to the media. Danida has been supporting media development in Bhutan since 1993 with the aim of promoting the development of a more independent press in the country. Danida supports the government's intentions to expand the use of information technology and the media's role in the process of democratisation. Training in media content production, engineering and media management and policy management are all key needs.

4.5 The government's information structure

The Ministry of Information and Communications

The ministry, established in June, 2003, is mandated to steer the development of the information and communication sector including telecommunications and the traditional and new media.

The Information and Media Authority

This authority, recently established, will research, plan, and support the growth of the media. It initiates the drafting of policy, regulation, and legislation for the ministry.

The Department of Information Technology

This department looks after the development of information technology. It initiates drafting of ICT policy and plans cutting across all sectors of the government.

Bhutan Communications Authority

BCA will be the regulatory authority for all the ICT and media.

Bhutan Telecom

As a public sector corporation, BT is responsible for telecommunication infrastructure. BT also administers Druknet, the only internet service provider, and the new mobile telephone unit.

Media Advisory Board

Established in 2001, the seven-member advisory board met just once and is practically a defunct organisation.

The Film and TV Review Board

All Bhutanese films are reviewed by the Film and TV Review Board before they are screened for the public. The board functions without written regulations and observes sensitivities that are considered generally acceptable for the public.

Case study 1: Views of a farmer in a remote area

Personal profile: Male farmer in his 40s Home: Shingkar geog

Media Access:

“The widest access to the media is through radio. But not many people own radios. And most villagers don’t know Dzongkha, Sharchop or English so they don’t really understand what is being transmitted. They however find the programmes very, very entertaining. They especially love the songs carrying Tashi Delek messages from friends and relatives on special occasions such as the Losar.

The few who understand the Dzongkha like chimis, gups, ex-monks, and ex-soldiers like to listen to policy-related programmes and they explain the broadcast contents to the illiterate farmers.

Kuensel is available only in schools, BHUs and other government outlets. We have to borrow the newspaper from them. Even in these places it arrives very late, by about a minimum of two weeks to a month. ”

Assessment of the Media:

“From what little I know of the media and its role and functions I think the media in our country is doing a good job. I am satisfied with the performance. It should continue like this.”

Impact of the Media:

“The media brings a lot of benefit to the people by providing them news, information and knowledge. I can see only a positive impact of the media. I don’t think there will be any disadvantages. I don’t see how the media can bring harm to our country or people.”

Expectations from the Media:

“ Most people in the villages don’t know what media is. Only a handful of people such as gups and chimis understand the media – that too only very little. Ordinary villagers don’t know what its responsibilities are or how it should function. So I suppose they will have no major expectations from it.

The only expectation perhaps is that most villagers wish that BBS would broadcast in Khengkha too, on certain days if not regularly. They also wish that there were longer duration of broadcast on holy and sacred days when they don’t work in the fields and they have more leisurely time to listen to the radio.

But if I may voice my expectations on behalf of the people we would like to request the government to expand media services to the rural areas. We would like to request for TV in the geog centres. People can understand things better by looking at visual images than by listening to the radio. This will also benefit local government officials, gups and chimis and other civil servants living and working in the villages. I am sure an illiterate Thimphu housewife knows many more things than a government official living in a remote part of the country. We would also like to request the government to regularly supply a newspaper (Kuensel) each to the gups and chimis. I don't think this would cost the government much but the benefits will be tremendous.

Some of the villagers who have been to the urban centres and seen media facilities there are amazed. They say they feel like living in different times. Like their urban cousins these people want to have road, electricity, telephone, tape recorders, TV and VCR in their homes. They rue that they will never see these in their villages in their lifetime.

There is a heaven and earth's difference in the knowledge, conduct and behaviour of people who have access to the media and other modern facilities. A Thimphu child will be smarter and wiser than a 60 year old villager. He knows more, talks better and will doubtless lead a better life than a village kid.

I plead with the government not to let people living in the villages feel neglected and deprived. ”

Entertainment:

“ Besides radio and the rare tape recorder, there's no other modern form of entertainment. People who travel to Gelephu, Samdrup Jongkhar and Phuentsholing have had the occasional opportunity to watch a film or two. If they are lucky perhaps they would get to watch a Bhutanese film.

Most people living in the villages do not know that we have our own feature films. Many do not know what rigsar music is.

Students discuss these things when they come home for their vacations and they influence the younger generations. But for most of the elderly people it is beyond them to be concerned about such frivolous things as entertainment. Most are too busy eking out a living to be too bothered and concerned about it. ”

CHAPTER 5:

The Bhutanese media background

This chapter covers all media

- Radio - BBS and international
- Television - BBS and international
- Film and music as entertainment media
- Internet
- Print - Kuensel and international publications

5.1 The Bhutanese media

The government's initiative to develop the Bhutanese media must be viewed in the perspective of a predominantly rural society where the oral tradition is still very strong. The concept of the media as a player in the growth of a modern society began in the mid 1980s, with the establishment of the first Bhutanese newspaper, Kuensel, and the BBS. In the late 1990s, as the ICT revolution touched the country, the electronic media was introduced. The global convergence of information technology is also a gradual but visible trend.

Media development in Bhutan has been a part of the process of planned development. The government made the initial investments, including the establishment of the national newspaper and broadcasting station. It laid the groundwork for electronic infrastructure, with the establishment of the telecommunication network and the distribution of power.

As the 1992 *kasho* (royal decree) clearly indicates, it is by policy that the media was established and then privatised. The initial emphasis was placed on infrastructure development and the training of media professionals. The next step was the sustainability of the media as independent organisations. Today it is the need for legislation that the government has also initiated.

With a weak resource base, the government has sought donor funding for the Bhutanese media. UNDP and other UN agencies supported the national newspaper and broadcasting station. In the 1990s, DANIDA was one of the main supporters of the media.

5.2 Development and growth of the media

Media development in Bhutan reflects the changes taking place in the Bhutanese socio-political and economic systems as well as global trends. There have been several significant milestones that mark media growth.

1. Literacy

Bhutan's rapid development saw changing priorities, from infrastructure to literacy. As society became more educated, the information sector was a natural priority and thus a demand for the media growth.

2. Independence

The government supported Bhutanese media was made independent of the civil service by royal decree in October 1992. This decree was a boost for media development.

3. Technology

Rapid advancement in technology raised the capability of the media in its production processes. This enhanced its sustainability.

4. Politics

The political reformation that Bhutan is going through pulled the media into the process by giving it a new role, sometimes known as the "fourth estate". This pressure will increase with change.

5. Economy

Economic growth means advertising, an important driver for the media. While this is yet to take off, it will be a strong force in the future. Economic growth also means more earning and spending power and increasing demand for media and entertainment.

6. Legislation

With a Constitution being drafted as well as media legislation, the media will see dramatic change. This is supported by policy. Today, it is government policy to provide information as a right.

7. Globalisation

The forces of globalisation that pulled Bhutan into a global arena has had a direct impact on the media as it has in all other sectors.

As is visible from the broad issues listed above, the change in media is affected by both planned initiative and demand from the audience.

5.3 A look at the different Bhutanese media

5.3.1. Print

Although the official literacy rate is 54 percent, the readership is much smaller. Reading and writing in Bhutan is still largely associated with office and school "work" and the concept of reading as recreation is new.

It is difficult to establish the exact number of bookshops in Bhutan because the trade license records maintained by the Department of Trade list bookshops selling printed books and periodicals together with shops selling exercise books and stationery. In fact most of the shops with books/stationery licenses sell only notebooks for students and other office paraphernalia such as files, folders, photocopy papers, etc. For example, out of the 148 books/stationery license holders in Thimphu, only five are genuine bookshops selling printed books, newspapers and magazines.

Most towns in Bhutan, like Samdrup Jongkhar, Kanglung, Gelephu, and Phuentsholing have at least one bookshop selling printed books and periodicals. Between January, 1978, when the first books/stationery license was issued to Lhaki General Store, and December 2002, more than 320 individuals and shops throughout the country had applied for books/stationery licenses. However, most licenses were either cancelled or not renewed and there were 162 books/stationery license holders left by December, 2002. About 91 percent of these license holders are located or based in Thimphu.

For this study, the print media is broadly classified into national and international publications. The subscription base for international publications is small, with Indian daily newspapers and magazines being most prominent in the market. The following table shows the estimated monthly sale of the most popular newspapers and magazines in Thimphu and Phuentsholing. The most popular magazines are the entertainment weeklies, and Indian news magazines like India Today. International magazines are less popular, one reason being its cost which is six times more than Indian news magazines.

Monthly/daily sales of magazines and newspapers in Thimphu and Phuentsholing bookstores

Magazines	Cost	Monthly sales
India Today (news magazine)	Nu.15/-	1,390 (690 copies)
The Record (monthly music magazine)	Nu.25/-	900 copies
Wisdom (children's magazine)	Nu.8/-	465 copies
IT/Computer	Nu.100/-	80 copies
Crime and Detective	Nu.25/-	230 copies
Women's magazines (Femina, Women's Era, Cosmopolitan, New Woman)	Nu.30-50/-	405 copies
Times	Nu 75/-	100
Newsweek	Nu. 75/-	40
Economist	Nu.120/-	60
Newspaper	Cost	Daily/weekly sales
Kuensel	Nu.10/-	5,910 copies weekly
Times of India	Nu.1 to 4/-	430 copies (daily)
Telegraph	Nu. 2-4/-	535 copies (daily)
Statesman	Nu. 2-4/-	250 copies (daily)

Source: Figures collated from 5 major bookstores and distributors: Bookworld, DSB, Pekhang, Megah, Kuenjung

The capital, Thimphu, have the most number and largest bookstores in the country. Together with Phuentsholing, the two major towns have larger populations. Thimphu is also home to the central government, hence a large literate population.

There is a small but growing interest in Dzongkha books, many are published by KMT Press, a private printing press. KMT has produced about 100 books so far with a few titles in Choekey and English. Fifty percent of its publications are educational materials for students and non-formal education learners. KMT's most successful publication is a Dzongkha-English Advanced Dictionary with 32,000 entries which was released in 2002 with a 5,000 print run. The printer-publisher has plans to produce more Dzongkha language publications next year, drawing heavily on local folklore and religious texts. Another publisher, Pe Khang Enterprise, says the handful of local books it has published in the English language have not done well, except for those being used by the Education Department.

Apart from a bi annual journal published by the Centre for Bhutan Studies, a journal from Sherubtse College, official newsletters by several government departments, and publications by schools and educational institutions, the national newspaper, Kuensel, represents the Bhutanese print media. A second newspaper, Kuenphen, ran for about one year and folded for economic reasons in the early 1980s.

Kuensel

Kuensel (roughly meaning clarity) was started in 1965 as an official gazette and, in 1986, was published as a government newspaper in three languages: Dzongkha, English and Nepali. It was, and still is, produced on an Apple-based DTP system, a modern colour-separation system, and Heidelberg offset printing machines. It introduced occasional colour editions in 1999.

The newspaper has grown from eight pages in 1986 to 20 pages with frequent supplements. Kuensel is distributed around the country by private agents who receive the newspaper on the public transport system. In the more remote places, it is carried by messengers and travellers. While the newspaper reaches most towns and valleys on the publication day, it can take about four days to reach the remote parts of the country. The newspaper is the most regular and popular information system for the country's literate population. From 500 copies in August, 1986, Kuensel now sells 14,850 copies in the three languages: English - 11,000; Dzongkha - 3,700, and Nepali 150. The estimated readership is 130,000 (Source: Kuensel).

The main problem faced by Bhutan's print media is the economics of publishing. Besides the difficulty in distribution, all the raw material and technical expertise is imported, resulting in very high production costs. In 1992, Kuensel became an independent corporation. It stopped receiving government subsidy in 1999. Kuensel continues to balance

financial sustainability with the newspaper's growth. The past policy has been to expand its pages as a weekly, given the difficulty in distribution and the need to utilize production equipment with commercial printing. The company is, however, recruiting more professionals with the plan to expand the frequency to either a daily or a bi-weekly in 2004.

Kuensel's increasingly open editorial policy is appreciated by the readers although many believe that Kuensel is government-controlled. There is a growing demand for Kuensel to increase its frequency, the pressure enhanced by the possibility of other newspapers coming into the market after the enactment of media legislation and the Constitution.

5.3.2 *Radio*

Radio is the most effective media in Bhutan and reaches by far the largest audience. The Bhutan Broadcasting Service estimates that about 400,000 people, or 60 percent of the population, listen to the radio.

Before 1970, radio broadcasts in Bhutan was limited to shortwave programmes from India and Nepal that were popular for their music. A regional All India Radio station in Kurseong, that broadcast in Dzongkha, found a small audience in Bhutan in the 1970s and 1980s and continues to broadcast today with Dzongkha language lessons and music. With the growth of literacy, more Bhutanese tuned in to international stations, mainly BBC and VOA. These stations are regular listening for the educated section of the population.

BBS was started as an amateur weekly broadcasting programme in 1973 by the National Youth Association of Bhutan. It was taken over by the Ministry of Communications and developed into a professional broadcasting service. By 1986, BBS had become a full-fledged radio station with daily broadcasts in Dzongkha, English, Nepali and Sharchhop. In a country where the rugged terrain was the main hurdle for development, BBS became the most penetrating communication service.

BBS radio now broadcasts 82 hours a week on both shortwave and FM. The FM service reaches the western region and certain areas in central Bhutan, and the station is working towards reaching FM radio to Trashigang by the end of 2003. Established with Danida assistance, the FM service will be further extended to reach pocket areas in 2004. BBS FM will eventually reach most parts of the country. The radio also reaches an audience in neighbouring Indian towns from where the populations even interact with Bhutan.

BBS shortwave reaches the entire country. The media survey shows that 40 percent of households have radio sets, and 23 percent have music sets which often include a radio. The government's Round Table

Meeting document for the year 2000 estimates the number of radio sets in the country to be as high as 250,000. This is largely a guesstimate as accurate data, particularly on specific numbers, are not available.

BBS's content is a mixture of entertainment and development-oriented programmes aimed at the largely rural audience. The radio programmes cover health, environment, agriculture, education, youth, women and children. Culture programmes, including traditional and modern music, lozey and stories, are popular. The various language sections receive an average of 300 requests for music every week, including requests from neighbouring towns in India, and Nepal.

Today, BBS is on the threshold of a new era of development, having established a modern studio complex, a 50 KW transmission system with the latest high technology equipment, and an expanding FM service. With ambitious plans to expand and professionalise the service, BBS will reach nation-wide and beyond the national borders as an effective regional service.

BBS's radio service expanded to 98 hours a week by November 11, 2003. It plans to continue expanding broadcasting hours in shortwave and FM. It is also experimenting in community radio broadcasting in Bumthang district with UNESCO support although the project is still in its initial stage of infrastructure building. The concept is to get local communities to participate in producing programmes themselves. It is generally believed that radio, neglected after the introduction of television, has not achieved its full potential both in audience numbers as well as content. While the urban audience is turning to other media, there is still a great need to strengthen radio broadcasts to reach the rural population. It is also important to increase local news through regional news bureaus and stringers.

5.3.3 Television

"I would like to remind our youth that the television and the Internet provide a whole range of possibilities which can be both beneficial as well as negative for the individual and the society. I trust that you will exercise your good sense and judgement in using the Internet and television."

King Jigme Singye Wangchuck, June 2nd 1999

Television was introduced in Bhutan with minimal preparation in June, 1999, and is, professionally, in its infancy. Broadcast in Dzongkha and English, BBSTV reaches residents in the capital Thimphu with two hours of programming a day. Other dzongkhags receive a delayed transmission of BBS TV through a video service provided by cable operators. BBS is currently planning to expand TV broadcasts to other parts of Bhutan through Bhutan Telecom's network cable system and is currently negotiating this possibility with BT.

After the introduction of television, BBS strengthened its commercial division and began to develop its commercial potential through advertising in television and radio and through the hire of studio and professional equipment.

The national broadcaster has been trying to model itself as a public service broadcaster with the long-term plan to become financially sustainable. It currently receives government subsidy for recurrent expenditure while infrastructure has been established largely with donor funding.

BBS TV is popular among the urban population. There are an estimated 35,000 TV sets in the country (BBS estimates), most of them concentrated in urban towns. The media survey shows that 25% of households enumerated have TV sets at home. In a 2002 BBS survey in the towns of Thimphu, Paro, Phuentsholing and Gedu, it was found that 96.7 percent of respondents owned a TV set, and 94.5 percent of them had access to cable service. The majority of respondents preferred the Dzongkha language broadcast and the percentage of Dzongkha language viewers was twice that of English. About 49.5 percent of the respondents watched BBS TV every day.

But the quality and content of BBS TV is seen as lacking in journalistic performance and not providing adequate national news.

The government of India has committed assistance to BBS with the development of a television center in Thimphu. The project is scheduled to be completed by 2005 but the Government of India team is yet to finalise the plans with BBS.

5.3.4 *Cable TV*

In 1999, Bhutan officially introduced international television, provided by licensed private cable operators. The sudden introduction of up to 45 TV channels represented an “explosion” of the audio visual media around the country. In 2002, a study by the Bhutan Telecom Authority (now BCA), estimated that cable operators had increased by 40 percent and, within three years, there were 33 cable operators licensed by the ministry of communications. Subscribers had increased by 142 percent with the total number of viewers estimated at 12,000 people in 18 districts.

According to estimates by BCA, Thimphu alone had 6,500 subscribers which means an audience of 32,500, or 72 percent of the population. It is suspected, however, that the real audience could be larger but is played down by operators for tax reasons. Thimphu and Phuentsholing have the largest number of subscribers and BCA estimates there could be 15,000 cable subscribers in the country.

The channels available to Bhutanese viewers are not by editorial choice but purchased as packages directly from Indian distributors. The

channels are decided by distributors in India. After complaints from subscribers on the lack of pay channels, the BCA issued a directive on the minimum number of channels to be provided in May 2002. This includes three entertainment channels, two sports channels, two news channels, one channel of local origination.

While most of the operators try to fulfill this obligation, the channel of local origination varies in content. BBS TV is not available regularly outside Thimphu, Phuentsholing and Paro and there is confusion over cable operators broadcasting any content of local origination. Some operators also broadcast videos of varying contents, from Bollywood and Tibetan films to school concerts, replays of world sports copied off television, and, in Kanglung town, one operator even broadcast a video of his child's birthday party. Often their content is mistaken for BBS TV.

The cable operators are licensed and initially regulated by the Bhutan Communications Authority. In July, 2003, BCA decentralised the regulation of cable operators and district administrations headed by the dzongda (district administrator) are now responsible for the overseeing and regulating the cable operators in their district.

The cable operators formed an association of private cable operators (APCO) on July 31st 2001 to streamline their dealings with outside distributors and the government. With all 33 cable operators being members, the association claims to have been able to reverse unfair deals by Indian distributors.

The introduction of TV has resulted in a sudden increase in the number of TV sets in the country. Import figures from the Trade Ministry show the following sale figures for the period 1998-2002. Upper middle class families in Thimphu and Phuentsholing also show a trend of having more than one TV set in the family, usually one for general watching and another for both computer games and TV viewing for the children. It is, however, difficult to obtain a count of the number of television sets because the department of revenue and customs maintain their records by weight and total values.

Import of TVs, VCPs, VCRs

Commodity	Country of Import	1998 import value Nu.	1999 import value Nu.	2000 import value Nu.	2001 import value Nu.	2002 import value Nu.	Total import value Nu.
TV (colour receivers)	India	-na-	6,585,127	10,414,478	11,590,966	7,469,789	36,060,360
	Others	5,675,107	301,015	343,232	8,228,816	7,435,799-	21,983,969
				Total colour TV receivers			58,044,329
TV (B/W receivers)	India	34,590	553,166	212,092	288,669	133,543	1,222,060
	Others	591,225/-	-na-	176,600/-	36,999,058	15,000	37,781,883
				Total B/W TV receivers			39,018,943
VCP/VCR	India	43,323	39,095	69,890	1,150,474	1,327,342	2,630,124
	Others	3,025,409	1,219,827	1,040,663	2,568,795	678,653	85,333,347
				Total VCP/VCR imports			11,842,124

Source: Bhutan Trade Statistics, Revenue and Customs Dept., RGoB (Figs till June, 2002)

5.3.5 Internet

Telephone links were first introduced in the mid 1980s, on a microwave system, and the first satellite earth station was commissioned in 1990. A Japanese-funded telecom network, constructed between 1992 and 1999, was the most critical foundation for the development of ICT. Based on this infrastructure, the current telephone system can accommodate 26,000 lines, about one-third of them in Thimphu, Phuentsholing, and Paro. In the Ninth Plan, the government plans to connect at least 10 telephones in every geog. This will, in theory, make it possible to connect all the geogs, 80 percent of the population, to the Internet.

A decade after the introduction of ICT infrastructure, Bhutan became linked to the worldwide web, in 1999. By 2003, Druknet had 1,600 customers with an estimated 5,000 dial-up users. There are 26 leased line subscribers with an estimated 1,050 to 2,000 computers connected to these lines. (E-readiness report, Druknet). There are also about a dozen internet cafes, seven of them in Thimphu. Druknet, the only internet service provider, is part of Bhutan Telecom, a public sector corporation, and also serves as Bhutan's Network Information Centre.

It is known, however, that most of the government web sites are not updated regularly. The government accounts are largely used by public servants for email and chat programmes. Just as computers were largely under-used in the early stages, the Internet is yet to be used efficiently for official or business transactions.

Estimates on the number of computers in the country range from 6,000 to 10,000 (DIT and Druknet). With 16 ICT based companies registered as suppliers, 18 training institutes, and eight local companies even licensed to assemble computers, this is expected to increase more rapidly. DIT is responsible for quality control.

There are encouraging signs, however, that it is picking up. The government's official web portal — "<http://www.bhutan.gov.bt>" — attempts to provide information on all government agencies, especially their activities and services. Managed by DIT, the long-term goal is to make it a web portal - the hub - for all information on Bhutan.

Statistics from Druknet, the internet service provider, for September 2003 showed 186,920 hits. The busiest Bhutanese website, Kuenselonline.com, sees an average of 40,000 to 60,000 hits a day. KOL is popular mostly for the open discussion forum where readers appreciate an open and free discussion on issues of national concern.

Kuenselonline: daily/ weekly statistics

Month	Daily hits	Daily visits	Monthly visits
Sept. 2003	60,365	1,658	34,836
August 2003	40,193	1,006	31,188
July 2003	43,300	1,211	37,550

Note: hits refer to the number of pages the user looks at while monthly visits refer to the number of times a person logs onto KOL. Source: Kuensel.

A 2003 KOL poll shows the visitors from the following parts of the world.

Kuenselonline Origin of Readership poll

Location	Percentage
Bhutan	22.89% (111 respondents)
Other parts of Asia	21.03% (102 respondents)
Europe	14.02% (68 respondents)
N. America	29.28% (142 respondents)
S. America	1.03% (5 respondents)
Others	11.75% (57 respondents)

Source: Kuensel

Profile of user poll

Location	Percentage
Professional	32.03% (74 respondents)
Civil servant	23.81% (55 respondents)
Business person	6.06% (14 respondents)
Students	31.17% (72 respondents)
Unemployed	6.93% (16 respondents)

Source: Kuensel

ICT development in Bhutan is uncoordinated, resulting in the inefficient use of budgetary, human and technical resources. Most ICT projects are resource or donor driven rather than needs driven and importance, at this stage, has been given to hardware rather than software, training, and communications.

The government has recognized the need for a three-pronged strategy to develop the ICT sector and the electronic media: the drafting of policy, legislation, and regulations; establishing adequate infrastructure; and, perhaps most important, increasing ICT literacy.

5.3.6 *Film and Music*

Film

The Bhutanese population was introduced to film by Bollywood because of the proximity as Hindi films had already flooded the region. The Hindi word, “baiscope”², became a Bhutanese word. With the growth of urban centers in the 1970s, the 900-seat Luger cinema was constructed in the 1970s and cinemas were also built in Phuentsholing, Gelephu, and Samdrup Jongkhar, Samtse and a very small cinema in Gomtu. Hindi films quickly became popular, partly because Bhutanese people had no alternatives. A popular wrestler-actor Dara Singh was called Dasho Dara Singh to connote his importance.

The popularity of “baiscope”¹ in Bhutan was given a boost and a film industry took roots with the introduction of video technology. The video industry took advantage of the vibrant black market in the South Asian region plus outlets like Bangkok to flood the urban Bhutanese market, adding action English films to Hindi films. By 1980, there were an estimated 1,000 VCRs and VCPs in the country, owned by senior civil servants and business people.

Bhutanese government organisations experimented with a few documentary films in the 1980s, most of them relegated to the archives. Film production began in the 1990s, spurred by the change from celluloid to the more portable video technology and “boomed” after 2000 because of digital technology. There were four films produced between 1990 and 1995, less than one a year, 13 between 1995 and 2000, more than two a year, and 32 between 2000 and 2003, an average of eight a year.

With the wealthier section of the population having access to more sophisticated western and Indian films, the Bhutanese film industry is geared towards a mass urban population. They are mostly copies of Bollywood films and churned out as business products. Producers themselves take a film around the country to screen them, with their own projection and sound equipment, and sometimes even carrying chairs for the audience.

In April, 2001, 13 film makers came together to form the Motion Pictures Association. Their aim was to promote the quality of Bhutanese films and to protect the rights of local film-makers who were concerned about the rampant copyright breaches already taking place in the music industry. In December, 2001, the government (Dzongkha Development Commission) gave the industry a boost by funding the annual film festival and awards programme, the main interest being to promote Dzongkha. Also in 2001 the ministry of communications established the film and TV review board to ensure some control of content.

¹ “Baiscope” is an Indianisation of the European term “bio-scope” which means “a view of life”.

Improved technology, experience and exposure and, most important, competition has resulted in significant improvements in the Bhutanese film industry. The shooting of Dzongsar Khyentse Rinpoche's "Travellers and Magicians" in the autumn of 2002, with a mixed local and Hollywood crew, made an impact on the industry since he involved a number of local professionals. The more innovative filmmakers saw the advantages of quality production.

Video rentals

According to the Department of Trade records, the first video cassette rental in Bhutan, Zomlha Video Cassette Library, was opened in 1979. Between 1979 and 1990, nine more licenses were issued in Thimphu for video cassette shops and rentals. Between 1991 and 1998, there were 86 licenses issued, at least half of them in Thimphu (Source: Ministry of Trade and Industries).

Apart from Thimphu, Paro, Gelephu and Phuentsholing, video rentals came up in most of the other dzongkhags after 1990. Within a few years video rentals were seen as a lucrative business.

The introduction of television in 1999 appears to have affected the video market. By December, 2002, out of the nearly 200 video cassette license holders in the country, around 136 had either cancelled or not renewed their licenses. The number of video cassette license holders dropped to a little over 50 in the whole country. In the capital there were only 26 license holders and only three of them were actually operating video rental shops by the end of 2002. Even these had managed to survive by diversifying their business into video CD and DVD sales and rentals. Videos are also watched by communities living on the fringe of urban towns without access to TV.

Music

Music production has been the fastest growing media in the past decade. It was not in the visible mainstream of media development but gathered momentum in the private sector, driven by the growing popularity of film and commercial interest.

Today, the music industry is a small economic force among media organisations. It is a popular entertainment media, and also an attractive sector for talented youth. Bhutanese singers are flocking to recording studios where they are paid anything from Nu. 500/- per song for a newcomer to Nu. 3,000 or more for an experienced singer.

With the strong emphasis that the government has placed on the preservation of Bhutanese culture, the national commission for cultural affairs has made several attempts to promote Bhutanese music. These included concerts/competitions, rules on public entertainment and school concerts. The government's attempts to encourage the more

traditional zhungdra and boedra songs have proven to be a losing battle against the commercially driven force of rigsar.

Two clear, irreversible trends have emerged. Rigsar, or new music, has gained a much stronger momentum than zhungdra and the bottomline is commercialism. A paper by the Centre for Bhutan Studies in 2000² argues that rigsar songs neither integrate nor promote traditional values; nor do they attain the artistic refinement/standards of traditional songs but notes that traditional folk songs and dances are being increasingly overtaken by rigsar songs, particularly among youth. The paper adds that the institutional frameworks necessary for preserving and promoting traditional songs and music is limited and may not be in a position to check the proliferation of rigsar songs.

BBS is also conscious of its role to keep traditional music forms alive and has, therefore, taken a stand to limit the broadcast of rigsar music, and showcasing only the best.

There are now 42 licensed companies (both audio-visual production companies) but a number of unlicensed companies and individuals are also producing music tapes. More than 100 music albums and 800 rigsar songs were produced in the decade between 1990 and 2000 (Source: CBS). Pioneered by larger companies like Norling Drayang and Tashi Nenchu, the companies record songs in Thimphu and produce the tapes in India, usually in Kolkata or Delhi. The tapes are sold through distribution agents and some companies, like Melody Drayang, boast of a 55 distributor network all over Bhutan.

Profits seem to be good, especially if an album is popular. Most albums see a small production number, about 2,000 copies with a second production if it does well. Apart from payment for singers and recording of the master tape in Thimphu, production costs in India are very affordable ranging from as low as Nu.10 to Nu 20/- per tape. Audio-tapes retail on average for Nu. 65.00 to 75.00, Nu 10/- goes to the distributor.

In the 1990s, nine recording studios were established in Thimphu. The most sophisticated facility is the 16 mic/ 8 track music recording facilities of the Bhutan Broadcasting Service. The other studios range from professional equipment to home studios.

A few music companies expanded into film production. All the films generally contain rigsar songs and music. Film songs also bring in a substantial earning to local films, especially the more popular films.

² Sonam Kinga, A Value Analysis of Traditional Folk Songs and A Study of the Development of Popular Rigsar Songs, CBS , 2000

CHAPTER 6

Bhutan in a global perspective

6.1 The new information, communication environment

The global debate on media and communication trends continue to evolve. Even as information and communication, as an industry, dominates the global economy, the concentration of ownership and the increasing commercialisation of media priorities can result in neglect of public interests. The right to communicate, access and participation, freedom of expression and the development of information infrastructures are pertinent questions facing the information society.

These issues are vital to Bhutan in the context of current socio-economic and political changes. The concept of freedom of speech and the role of the media are critical issues as the country builds a unique system of democratic governance. The responsibility of the media grows proportionately to the increasing public discourse in the Bhutanese media, particularly on the Internet. This public discourse is becoming an increasing phenomenon. The development of the public sphere will involve increased participation, and literacy and education are instrumental to the quality of public participation.

Just as the government promises access to information as a right of every citizen, and the Constitution is expected to guarantee freedom of expression, it is necessary that the technological and legal structures are in place. Media access and information infrastructure needs to be more central to development planning in Bhutan, not just to overcome the country's geographical barriers, but as an active player in the changes.

Media and IT, which cuts across all sectors of development, are recognized as the “most powerful instruments for the penetration of global culture and the values of the global market place”¹. The government acknowledges that the challenge for Bhutan today is how to take advantage of globalisation and the information revolution and yet preserve and promote essential elements of Bhutan's culture and traditions in order to enhance our spiritual well-being (ibid).

6.2 Globalisation and communications

Communications plays a central role in accelerating the process of globalisation. Progress in telecommunication, satellite, and computer technology has opened up the skies, overcome physical barriers, and changed the nature of international communications. Media consortiums have developed into multi-million dollar enterprises

¹ Development Towards Gross National Happiness, November 2000, 7th Round Table meeting with donors, Thimphu, RGoB.

covering the globe, and thus the commercialisation of the media industry itself.

Globalisation has freed the flow of information and brought about a more liberal, more competitive environment. More than 170 countries are using Internet. In Bhutan, improvements in communications technology has helped the country join the global information society. But we find ourselves carried along by this tidal wave and, like many developing countries, responding helplessly to international trends.

Thus the concern about “media imperialism”. Globalisation increases an awareness of the local media, particularly as a contrast to the “aerial invasion” from outside.² This is also happening in Bhutan and the Bhutanese media has come under pressure to improve content, both in terms of quality and quantity. Bhutanese consumers are also demanding greater variety, higher quality and, inevitably, more entertainment.

When we refer to international media, the South Asian experience is very relevant, particularly India where we find many lessons. On international television programmes, for example, English language channels are doing much better after being dubbed in local languages. Bhutan, too, received Cartoon Network in Hindi until an outcry from viewers forced cable operators to restore the English version. Doordashan, the national broadcaster, broadcasts 19 channels to provide a diversity of programming to compete with the commercial channels. The new direct to home TV services can now provide up to 200 channels across the region.

Regulators in Bhutan should be aware that Bhutan is dependent on Indian broadcasters for programming content and is not likely to take this business elsewhere as we do not have economies of scale to reach broadcasters outside South Asia. The need for foreign exchange is an additional restriction.

Print media, film and music face the same challenges. English language entertainment publications, many of them based on western templates like *Cosmopolitan*, *Computer magazines*, Indian film and music, have become even more readily accessible in Bhutan today with the improved communications.

Even as Bhutan emphasises the need to preserve its cultural identity, the media explosion and political liberalisation combine to form a powerful force that challenges traditions. Again, like other small societies, Bhutan will not be able to produce enough local content to match the massive inflow of media through satellite/cable television, the internet, and print media that know no political boundaries.

² French D, and M.Richards, *Contemporary Television Eastern perspectives*, SagePublications, 1996

6.3 Media impact

Media is not an active agent of change in isolation but has influence through a complex set of cultural, economic and socio-political factors. A new perspective in communication research looks at communication as being integral to socio-cultural change, moving away from the old focus on communication as social control. The notion of a powerful and unlimited impact of media on behaviour has been proved invalid and we assume that in Bhutan, too, there are many factors beyond the media which shape a person and society.

To take the television example, communication scholar Hamid Mowlana's thesis³ states that the debates can be aligned along three schools of thought. One that argues that the impact of television is immense and totally pervasive, requiring immediate formulation of national media policies to handle these increasing influences. Another maintains that the lack of data precludes the ability of countries and communities to verify the degree and nature of TV's impact. The third argument is that national communication policies restrict the flow of TV programming and, despite the imbalances, the process will right itself over time if there are fewer restrictions.

The Bhutanese intelligentsia believe that all three schools of thought are relevant to Bhutan. The first theory, the all-pervasive impact of the media is, perhaps, the weakest argument but there is concern especially about the impact of television on youth. The ministry of information and communication, particularly, is keen to develop information and communication policies on research-based analysis. This proves the second argument. As for the third theory, the King of Bhutan himself "freed" the government media from civil service control, by royal decree, in 1992.

A common issue of concern is the argument that the American model of commercial television programming may lead to consumerism and cultural homogeneity. In South Asia, the same argument led to an increase in local programming to counter international channels. But India, with 50 million homes having cable connections and some 90 million homes having television with a viewing population of more than 400 million⁴, is a different scenario.

Bhutan's own infant media has developed somewhat discordantly. The most popular media today, global television, was introduced less than three months after the national broadcaster launched national television in June 1999. Overnight, urban Bhutanese found themselves with a choice of up to 45 channels. This chaotic or unregulated introduction of cable television is not unlike the experience in South Asia and other developing countries but the impact will be far greater in Bhutan, a small and vulnerable society with limited resources and difficult terrain.

³ ibid

⁴<http://www.indiatelevision.com> , October 2003.

6.4 Public Service Obligations

If the relentless commercial drive in the international media scene, especially television, has alarmed societies, it has left public service broadcasters practically helpless. Apart from the BBC and PBS radio and television in the United States, government owned stations do not have the clout or funds to compete with the commercial and often sensational media. Most of the media that do receive government funding function as official media which is used more as propaganda facilities by the governments. In an era of liberalization, many governments tended to follow global trends and leave broadcasting increasingly to market forces.

Even BBS TV was, in the initial year, asked to find ways to be financially sustainable⁵. This led BBS to initiate activities to establish a strong commercial division, a move that is now being reconsidered as being secondary to public service obligations.

In Bhutan, the public service obligations of the media – both the traditional and new media – is important for the achievement of Gross National Happiness. Public service must be interpreted at two levels: subsidy of essential services for those who cannot afford them and for the media to provide a professional service to the population. Government and public sector corporations must subsidise infrastructure including power, telecommunications facilities, and the electronic media and ICT services, which are particularly expensive. The media must play the role of the “fourth estate” that is required in a healthy democratic system.

Public service is now globally regarded as a means of fulfilling the “entitlements” of all citizens to information, culture and entertainment. In Bhutan public service obligations is one way of ensuring that media and IT benefits everyone, particularly the unreached. It is not different from social services that aspire to reach the unreached.

6.5 Digital Divide

The digital divide is a major challenge for the world, particularly for the developing world. The World Summit on the Information Society in December 2003 focusses on this divide which threatens to exacerbate already-wide gaps between rich and poor, within and among countries. Ironically, ICT can widen the information divide. E-experts argue that developing country governments should act as catalysts, rather than controlling agencies, to facilitate development and should invest in education and e-governance.

The digital divide is very real for Bhutan which started its development process decades after the rest of the world. When mobile telephones are used by up to 90 percent of the people in some countries and

⁵ BBS's Management Board emphasised the need for the broadcasting station to develop a business plan to become more financially sustainable.

Bhutan Telecom estimates 2,000 subscribers by 2004.

The digital divide is also an internal problem, directly related to a number of existing trends, for example, the rural-urban divide, literate-illiterate divide, rich-poor divide, and the old-young divide. With women literacy lower than male literacy, there is also a gender divide. When the decentralised planning takes place, ICT will be low on the agenda. For the fiscal year 2003-2004, social services receive 24.8 percent and information receives 2.00 percent⁶.

The government's initial ICT priorities have emphasised infrastructure and hardware. It has waived tax on the import of computers and other hardware. With the ministry of labour and human resources pushing ICT as a potential employment market it is encouraging entrepreneurial initiatives in the ICT industry. Incentives include a number of loans and subsidies. This is important because ICT is known to have led to isolation, insulation, inequalities.

Ultimately education, with emphasis on ICT literacy, has to be the driver for Bhutan's move into the information age. The long term focus will be on youth education. The government has recognized this and has developed a comprehensive US \$ 24 million ICT masterplan in the education sector. This sector, together with health, also receives the largest annual budget allocation – 24.8 percent - from the government.

The government plans to train more than 900 IT professionals at basic level and 50 at higher levels during the 2002-07 Plan period. While encouraging the development of private sector training institutions, ICT education is being included in the formal education curriculum. The 35 high schools have started basic computer courses. The only college, Sherubtse College, offers a Bachelor of Information Technology and a Bachelor of Science and Technology. There is a role for newspapers and broadcast media to co-operate with schools and universities to deliver education.

6.6 Convergence

Convergence has proved to be one of the most exciting yet elusive concepts today in international media trends. The possibility of media convergence has given the world much optimism and many were led to believe that this is a futuristic “one stop shop” for the world. Then it dawned on many enthusiastic technological societies that the utopian image of a radically different world with a single new media form may not take place at all.

Media law academics⁷ point to the inappropriateness of the metaphor of a single network, the so-called information highway. In essence, the argument is that the cultures of the various media — TV and

⁶Finance ministry's annual budget report to the national assembly, 2003

⁷Stefaan G. Verhulst, in his article “Coping with the New Communication Environment: Are Regulations still Relevant?” points out that there is no single new media form or market, and there is not likely to be that degree of uniformity.

Internet for example — remain radically different despite the possibility of technological convergence.

But media convergence is an issue and is taking place in greatly differing stages in different countries. Countries like Singapore, U.K., and Australia have taken it seriously. Malaysia tried to base its entire future planning on a converged ICT society. Until recently, India was keen to enact a Convergence Law. The common view seems to be that convergence is an issue but one that needs to be viewed in the overall perspective of ICT and media development.

Bhutan would have to understand and adopt a convergence policy and approach in its own context. The traditional media and new media are developing more closely together than in most other countries and technological convergence is already taking place. Taking Kuensel's experience with its hard copy and Internet versions, there is not only a technological convergence but a strong influence on content and impact.

Again, we see two advantages. Bhutan can adopt its pragmatic approach to development and draw on the international experience to perhaps tailor a workable convergence policy. Secondly, Bhutan is at an early stage of development, with limited infrastructure, so it can skip generations of technological experimentation and make an innovative start.

The ministry has already made this start. Bhutan Telecom (BT) is laying optic-fiber lines to Phuentsholing that will provide more possibilities for convergence in media technology. The cabling, which will make use of existing power transmission towers, is expected to be ready by spring 2004. An exciting prospect is the possibility for traditional media like the Bhutan Broadcasting Service and Kuensel to tap this technology to transmit TV programmes and printing text to the rest of the country.

The Minister of Information has already initiated discussions on closer cooperation between Bhutan Power Corporation and BT. The government is also keeping to its schedule of providing at least 10 telephones in every geog and electrifying 15,000 rural houses by 2007. If these objectives are met, there will be tremendous implications for traditional and new media. ICT infrastructure plans and developments have direct implications and opportunities for media convergence and development.

The IT and Media sectors have seen little cooperation or coordination in the past but a basic premise dictated by converging technologies is that they will have to work more closely together. This closer coordination is possible with the establishment of the Ministry of Information and Communications.

The information and communication mandate goes far beyond media or even e-services at this stage. ICT and media services are critical for the growth of every other sector. National priorities such as roads, health, shelter, education, employment are the ultimate goals to be enhanced as the royal government networks the population on a shared ICT infrastructure. ICT technology, hardware and software, and content are all tools to achieve the national goals envisioned in the concept of Gross National Happiness.

CHAPTER 7: Situation Analysis

The impact of media on society

7.1 Introduction

The Bhutanese media received international attention in 1999 when it introduced Internet and became one of the last countries in the world to introduce television. Since then there has been some international interest in the impact of TV and Internet on Bhutanese society but most of the reports have a limited perspective. Meanwhile, internally, there has been no substantive study on the media.

This report looks at the actual impact of different media on Bhutanese listeners/viewers/readers and on society as a whole. It identifies changes in the perceptions, values, and life styles of the audience as well as the reactions and responses of media professionals and practitioners. To provide a more comprehensive understanding of the impact of media on society, the assessment is done in separate sections: social, cultural, political, and economy.

As a background to help understand the impact, the study will also examine relevant trends like the access that people have to different media. This is indicated by the infrastructure, equipment, and affordability and developments within the media itself. Another important trend is the impact of international media trends on the Bhutanese media and, therefore, on the audience.

Ten percent of the world's population has computers and one-third of the Internet users are now Asians. There are a handful of Bhutanese nationals who have nearly complete access to the latest technology and all media and thus enjoy the same facilities as people living in the developed world. This study, however, looks at the majority of the population that do not.

7.2 Access

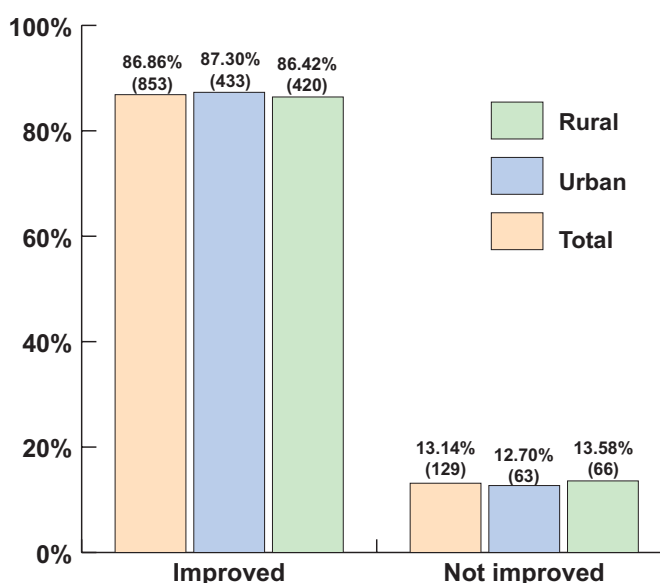
The first element of access is **infrastructure**. Although it is an impediment, Bhutan has gone beyond the infallibility of its rugged terrain, especially with the latest technological developments. The provision of power and telephones is still an issue. The power sector is committed to providing electricity to 42 percent of the population by 2007, with an emphasis on rural areas, and the telecom sector is mandated to provide a minimum of 10 telephones to each geog, reaching 80 percent of the people. Today it has 21,500 connections. Meanwhile, these two sectors are discussing the convergence of technology and the ministry of information and communications envisions sharing infrastructure like fiber optic cables with the media. This provides a good foundation for media access.

The second is **equipment**, both hardware and software. Although the availability of equipment in Bhutan is limited, a growing proportion of the population has media access today.

The third element determining access is **affordability**. This dictates what media the average person has access to. As confirmed by the survey, radio is the most common media available in Bhutanese households is radio followed by TV, music tapes and newspapers and magazines and film in that order. Most households own more than one media - usually a radio and music set or TV.

Overall, media access has improved for a majority of people in Bhutan. In the survey, 86.86% or 853 respondents say their access to media has improved and only 13.14% or 129 respondents feel it has not. The improvement is felt in both rural and urban areas. (Figure 1)

Figure 1: Improvement in access to media



The survey found that 76.9%/756 owned a radio and 48.7%/479 owned a TV set. Only 2.3% or 23 respondents owned a computer at home (Figure 2). There is a difference in households' access to media between urban and rural areas. The most common access for rural households is the radio, followed by music tapes, TV and then newspaper and magazines. In urban towns, the order is TV, radio, music tapes and newspapers and magazines. (Figure 3)

Figure 2 : Ownership of media equipment

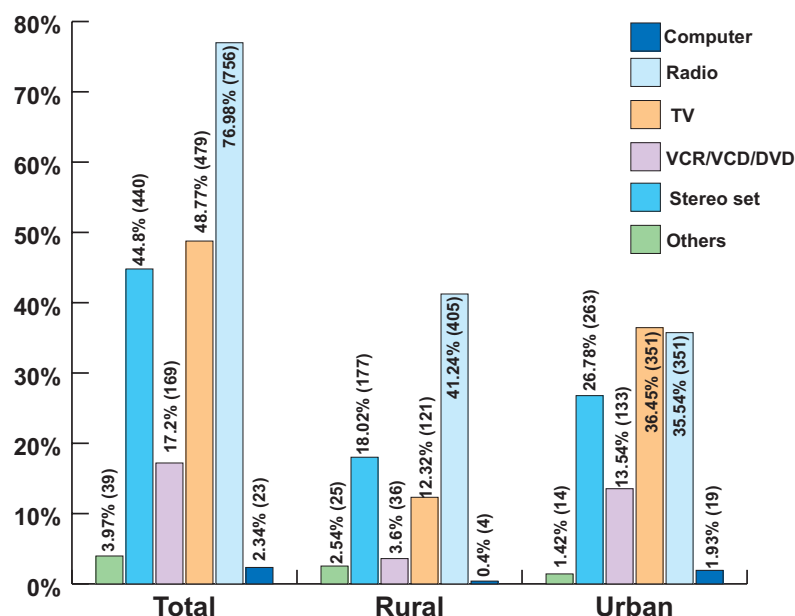
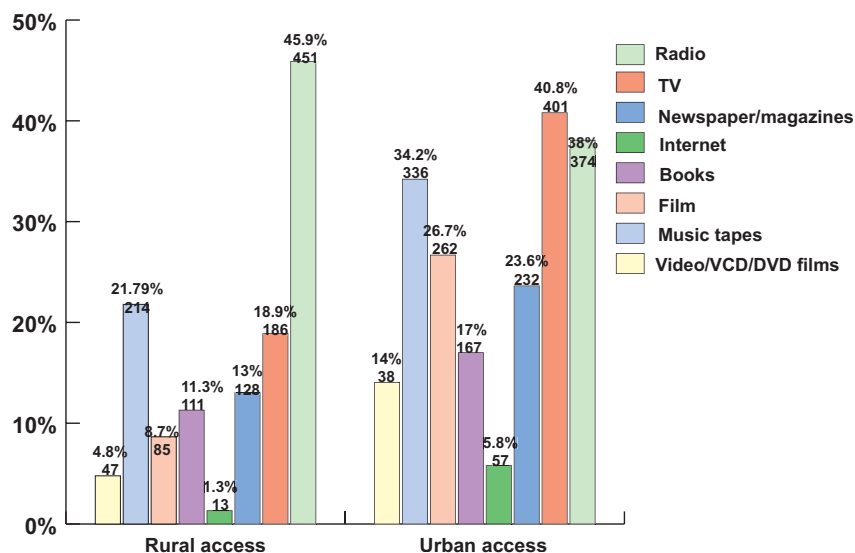


Figure 3: Number and percentage of household' access to media



Although the government subsidises infrastructure and promotes ICT equipment, cost is a problem for a majority of the people. Even a locally assembled computer costs twice a government Director's salary and the cost of Internet is one-and-a-half times the cost in India (E-readiness study).

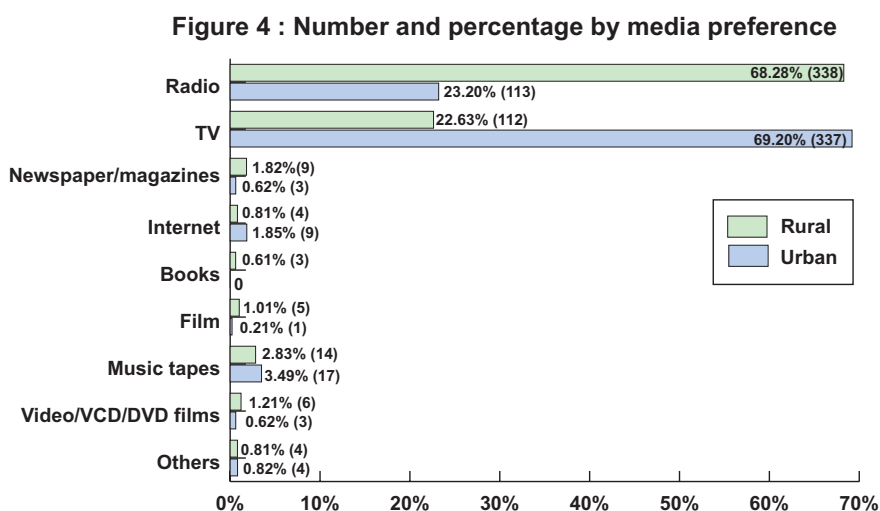
The following section looks at access to different media:

7.2.1 Radio

Radio reaches a majority of people and will continue to be the most prolific form of media for Bhutanese in the 20 districts. It is estimated that 77 percent of the population listen to the radio and people are now buying transistor radios with FM frequencies so they can listen to the BBS TV broadcasts on the FM frequency . The significance here is that radio listeners want more programming. The cheap transistor sets from China and India has greatly increased access.

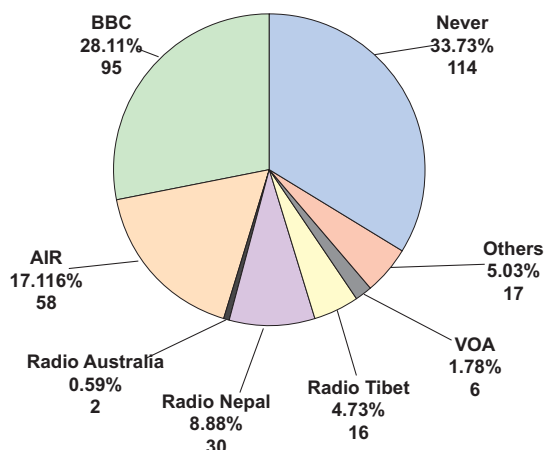
The study proves that, for thousands of farmers in the remote regions of the country, radio is the main source of information, knowledge, education and entertainment. In fact, it is the only media in some places. There is also a strong feeling, among media professionals and the audience, that radio has not improved since the start of television.

In terms of people's specific preference, it is radio (45.93%/451), followed closely by TV (45.72%/449) and music tapes (3.16%/ 31). Rural residents (23.2%/113) prefer the radio while urban respondents (69.2%/ 337) prefer TV over radio. (Figure 4.)



Apart from BBS, listeners also tune in to other radio channels. In 1989, when the civil service changed the government's office timing from 8am-2pm to 9am-5pm, one of the main reasons for starting of office at 9am was to allow of officials to listen to BBC's 8am news broadcast. The most frequently listened to international radio channel is the BBC (28.11%/95), followed by All India Radio (17.16%/58), and Radio Nepal 8.88%/30). A third of radio listeners do not listen to international channels (33.73%/114). (Figure 5)

Figure 5: Listening to International Radio Stations



7.2.2 Television

The monopoly of state broadcasters has given most government TV stations an unrivalled reach in developing countries. But for BBS TV, which was started in June, 1999, with no long-term planning, the service is still confined to the capital.

In the villages people are eager to get BBS TV. Most feel TV will educate the rural population since it portrays living images and can help them understand national events, issues and policies better. Chimis, stressing the need for more access, say that Bhutanese TV will instill a sense of nationhood.

BBS TV programmes are relayed by cable operators to all the other districts but it is an inadequate service. Without supervision the broadcasts are left in the hands of operators who sometimes broadcast poor quality and old programmes, including news. In mid September 2003 cable customers in Trongsa, Bumthang and Mongar did not receive BBS TV for 10 days because the supplier in Thimphu had problems with his video recorder and was unable to copy the programmes for distribution. This is a common occurrence. In fact, towns like Trashigang, Kanglung, Pema Gatsel, Samdrup Jongkhar, Dagana and several others do not even receive BBS TV.

Sherubtse students complain that they have access to international TV but not to Bhutanese TV. The further away from the capital, the less regular is BBS TV. Cable operators explain they have not been able to organize a video service relay. An old news item being broadcast led people in Zhemgang to believe that it was snowing in Thimphu in summer.

In focus groups discussions, local government leaders say that the government must intervene to provide wider media access. As one chimis comments: "We do not have a wide and proper coverage of our

own media so the Indian culture is quite dominant among the middle and lower classes. The upper class is taken up with western culture.”

7.2.3 International TV

BBS TV had a monopoly status for three months and was then swamped by cable TV and now the 33 cable operators have a better reach of the national audience than BBS. There is an estimated 12,000 cable TV subscribers in the country although this figure is suspected to be reduced by cable operators to avoid tax. BCA believes there could be at least 15,000 subscribers in the country.

Thimphu and Phuentsholing have the largest number of channels, up to 45 channels. Satellite TV access varies greatly in quantity and quality. In districts outside the capital, the smaller cable operators are now required to provide a minimum of eight channels. In practice, the minimum channels are not always available especially in the smaller urban towns.

With the excitement of TV, remote areas like Gasa, Haa, Lhuntse, Merak Sakten and the Doyas feel left out. People want to have access to TV. Focus group discussions with chimis reveal that they feel a large proportion of the population “live in darkness and ignorance”.

7.2.4 Print

Despite the acknowledgement that most Bhutanese people do not read regularly, many people do claim to be able to read.

The survey found that 59.9%/589 of the respondents claim they can read, a marginal increase over the official literacy rate of 54 percent. (This could be due to the increasing number of people who have attended adult literacy non-formal learning programmes). About two-thirds of the respondents who do not read (64.88%/ 255) do not because they cannot read. The majority of people read in the English language (51.7 %/ 446) followed by Dzongkha (40.37%/ 338). (Figure 6). While most people believe that reading is important (95.50%/ 848 / See Survey Table E4), people seldom read in Bhutan (40.75%/ 240/ E2). Most of those who do read, read for less than half an hour a day (24.45%/ RF 144/ See Section B: Survey Table E2). Figure 7 shows that the most common print media read are newspapers, religious texts and academic books in that order.

Figure 6: Frequency and reading habit

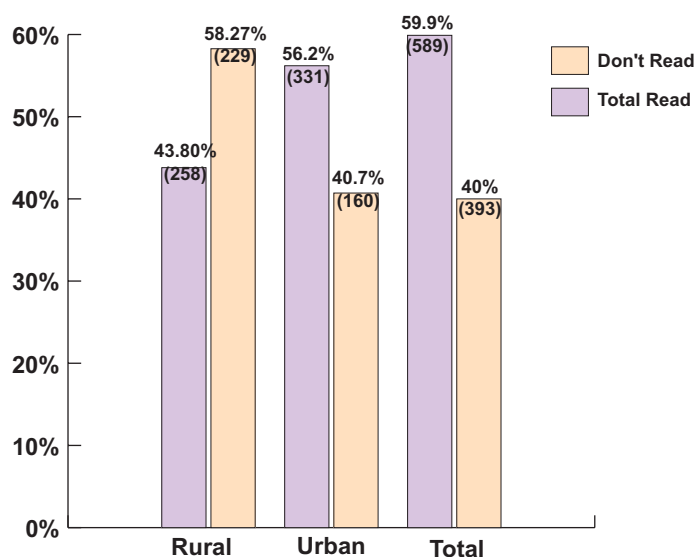
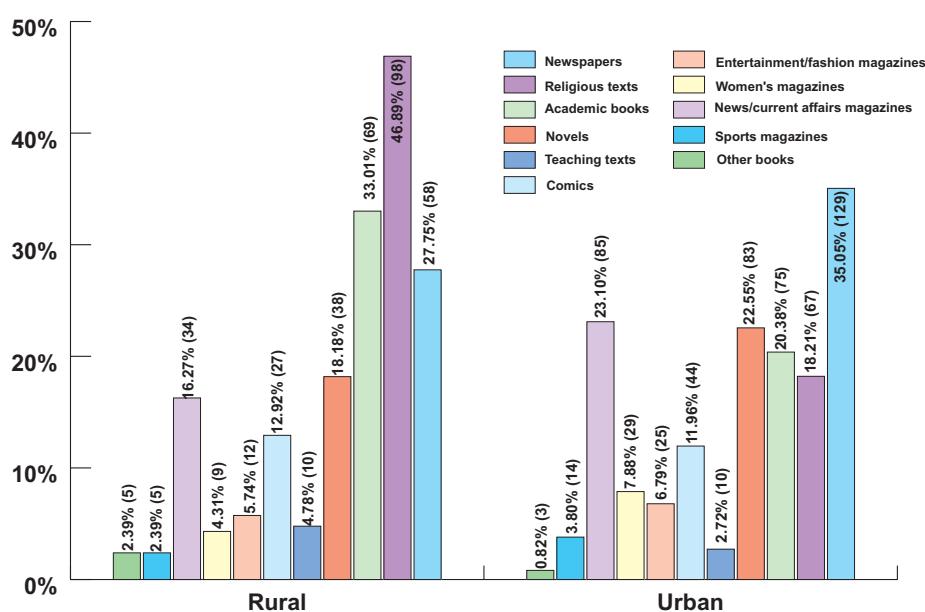
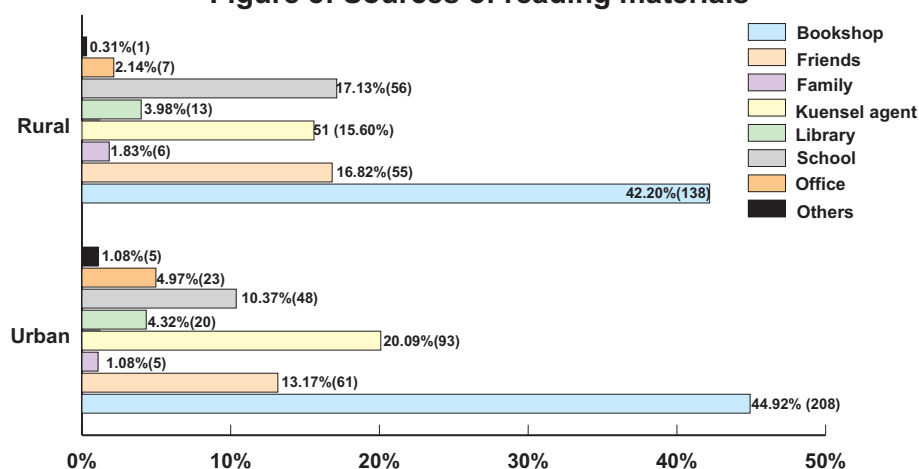


Figure 7: Type of books read



Bookstores are located in towns and there is only one public library, the Thimphu Town Library. Apart from the shops which supply most of the reading material, the Kuensel agent is the second most common source for reading material followed by friends. The school is a good source of reading material in rural areas (Figure 8) with 13.35%/ 208 respondents saying they get their books from school. Many of them are likely to be from the NFE classes.

Figure 8: Sources of reading materials



Kuensel reaches 130,000 people through its 15,000 print-run. This is the literate group of people. Sent by public transport, it is faster than official mail, reaching several districts on Saturday itself. But it is late in remote places, sometimes a month or even later. The national newspaper is not missed by the villagers but local government officials, gups and chimis, however, feel a critical need for it especially in the light of the political changes and changes in their own responsibilities. It is critical for the construction sector for job tenders.

There is also a small but growing readership of newspapers and magazines mostly imported from India. Based mainly on subscriptions, the Calcutta-based Telegraph is picking up because it is printed in Siliguri. (See media background for monthly/daily sales of magazines and newspapers in Thimphu and Phuentsholing bookstores). Only 1.22% of the survey respondents said they liked reading newspapers and magazines. This clearly shows the greater interest among people in the broadcast media and confirms the lack of interest in reading among Bhutanese. A Thimphu book salesman said that the few who buy books do so to present it to someone else.

7.2.5 Film and music/entertainment

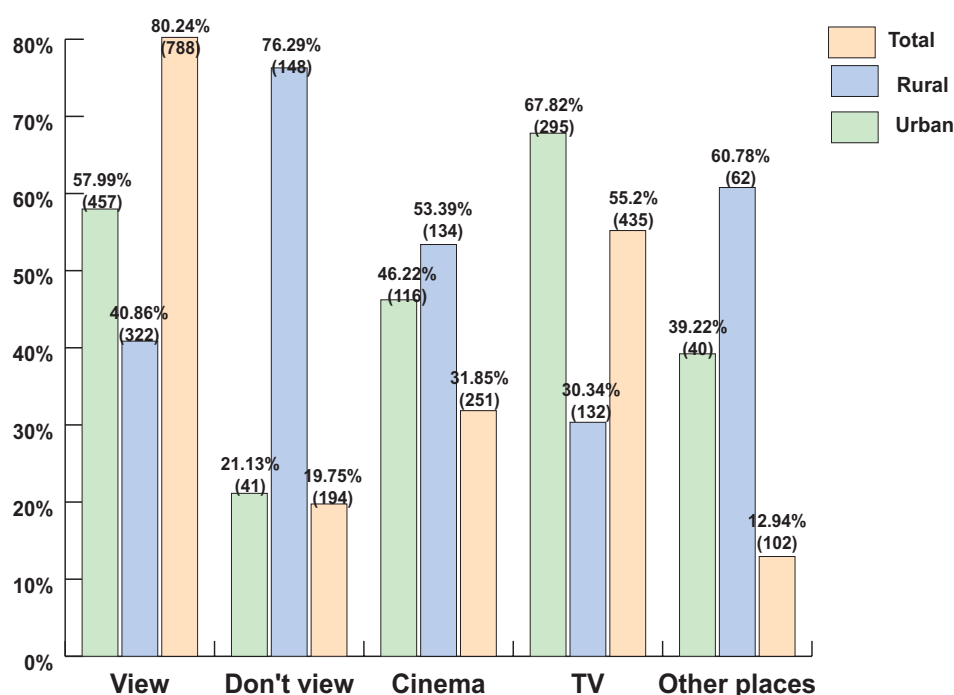
Bhutanese film and music have a thriving market in larger towns like Thimphu, Phuentsholing, and Paro. For people in the remote areas, it is considered a treat to come to the capital or other big towns to watch a film. Chimis from the east, for example, spend several thousand ngultrum each time they come to Thimphu to buy old Bhutanese films on video and cassette tapes, many on order from people in the village.

Access is a challenge for film producers as well, many of whom have to negotiate with local officials to fix ticket prices and to rent halls to screen their films. As a result, film makers and producers in a focus group discussion pointed out that they do not go to some dzongkhags

because of the difficulty in distribution and traveling. Smaller towns and those further away are just not profitable enough for film producers to screen their films. This is a major factor determining access and choice of entertainment.

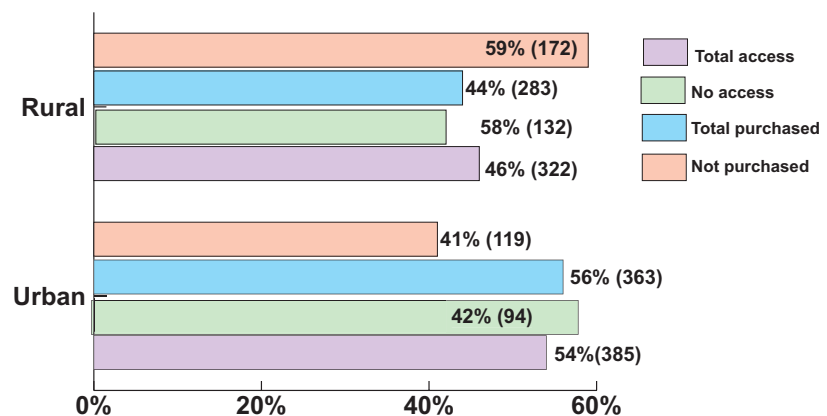
Figure 9 shows that 80.24%/788 of the survey watch films and 19.7%/194 do not. Most of them watch films on TV (44.3%/435), and (31.8%/251) go to the cinema mostly for Bhutanese films. Of the total respondents, 78.5%/663 have watched Bhutanese films. On average (48.1%/407), most people watched between one to two Bhutanese films in the past six months (watched 3-5 films in the past half year, and only 5.6%/48 watched more than five films in the same period.

Figure 9: Viewing of movies and location for viewing



The music industry saw an explosion of new music in the past few years. Figure 10 shows that 68.9%/646 people have bought music tapes in the past six months. The number of people with access to Bhutanese music tapes is higher at 75.8%/71.

Figure 10: Access to new Bhutanese music/audio tapes in six months

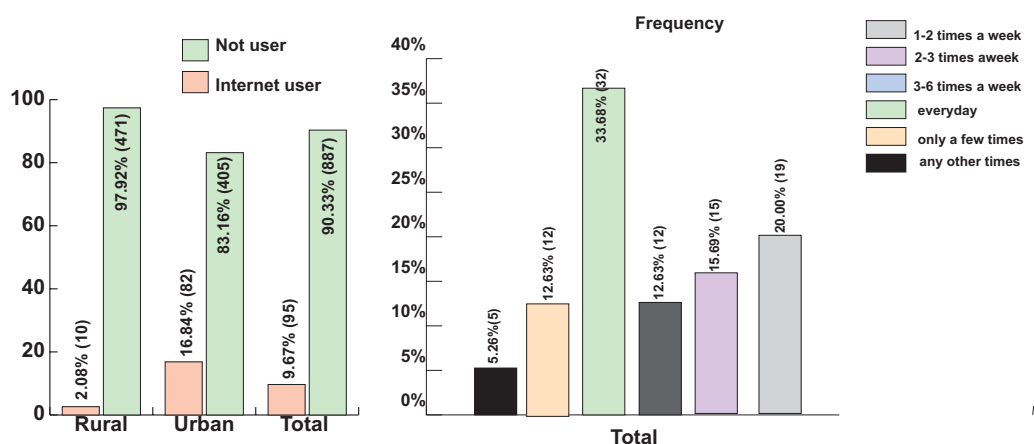


7.2.6 The Internet

While Bhutan is at the low end of the digital divide, there is already a real divide in Internet use inside the country with users mainly confined to the capital, mostly in government offices.

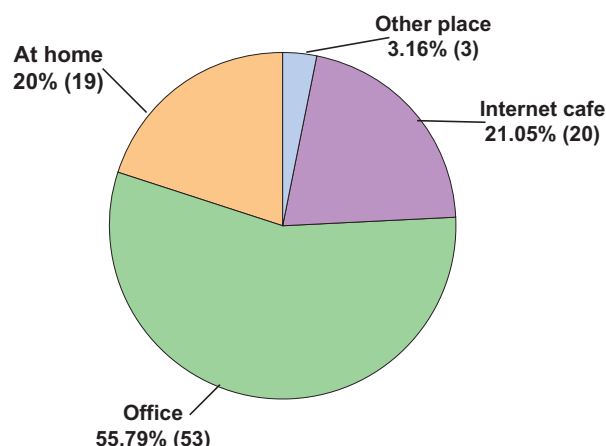
The survey (Figure 11) shows 86.3%/82 users are from urban areas. Frequency of use ranges from 33.68%/32 accessing the Internet every day to 20%/19 using it 1-2 times a week. Figure 11 shows that more than half, 55.79%/53 users log on to the Internet in the office, with 20%/19 using the Internet at home. As is the trend with overall usage of the Internet, 84.2%/16 people who use it at home are urban dwellers.

Figure 11: Use of Internet and Frequency of internet use



Kuenselonline, which was introduced in February 1997, has gained a regular following. 15.79%/15 of respondents read KOL every day, 29.47%/28 read it 2-3 times a week, and 31.58%/30 read it once a week (See Section B: Survey Table F2). 23.16%/22 say they have no access to KOL, this could be because they access the internet at cafes where the costs restrict them to using only email.

Figure 12: Location of Internet use



The frequency of access to BBS.com are as follows (Section B: Survey Table F5/F6): 38.89%/28 visiting once a week, 18.06%/13 visit 2-3 times a week, and 12.5%/9, every day. 30.56%/22 respondents do not access BBS on line. This is probably the segment of users who use only email and do not access media sites. The government web portal was set up in 2003 and is regarded as Bhutan's first step towards e-governance.

Druknet, the only Internet service provider, registers 78.9%/60 users and is the most frequented website apart from the media sites.

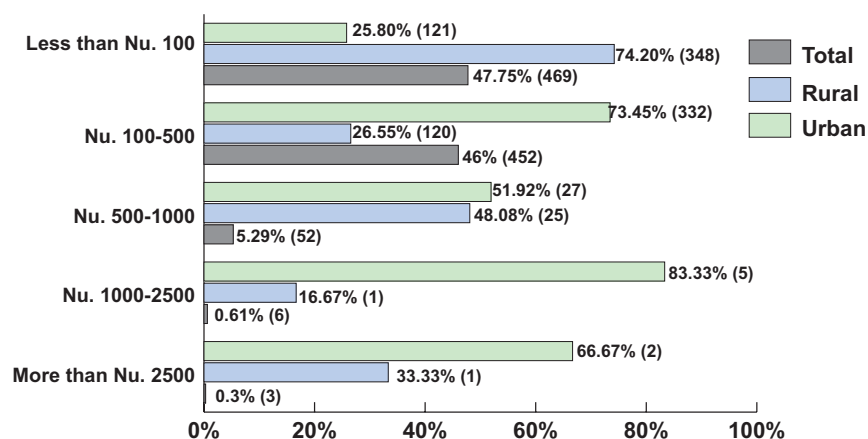
Access to the Internet is particularly important for people living outside the capital who want instant information. Many civil servants who live in the districts feel more connected with headquarters through Internet. They also feel more in touch with news and development, and are able to share files and network, making work easier.

7.2.7 Cost

Cost and affordability of the media is becoming more important in Bhutan today along with the increasing options. The question of sustainability of services such as the Kuensel and BBS, which have public service obligations, and the commercially driven entertainment media - cable TV, film, music - is relevant in a country with a small population and limited paying power.

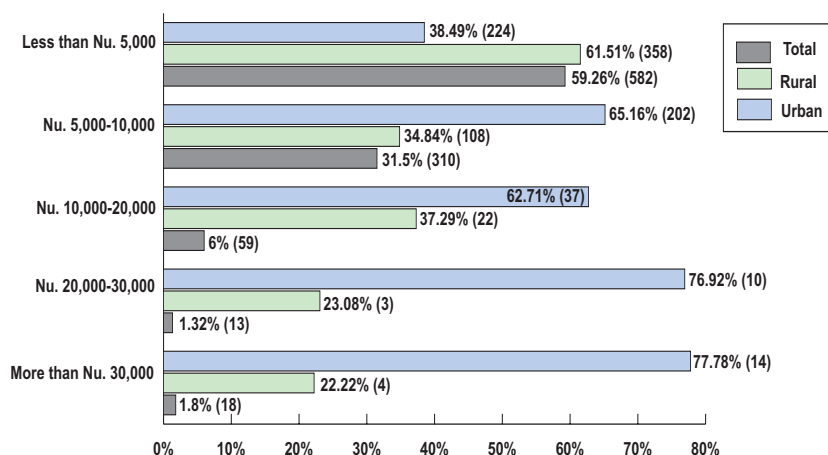
On average, 47.7%/469 spend less than Nu.100/- on media every month (Figure 13). By media spending, we mean spending on audio-visual cassettes, newspaper, magazines and books, cable TV subscriptions, video hire, film tickets, internet services etc. 46%/452 spend between Nu. 100-500/-. Only 5%/52 spend between Nu.500-Nu.1,000/- a month on media services. The average monthly spending, therefore, is up to Nu 500/- a month.

Figure 13: Household's average expenditure on media



The majority of people, 59.2%/ 582, are in the less than Nu. 5,000/- monthly income bracket (Figure 14). A third, or 31.5 %/ 310 respondents are in the Nu. 5,000- Nu. 10,000 bracket. Media spending, therefore, represents between two to five percent of the income.

Figure 14 : Average household's monthly income

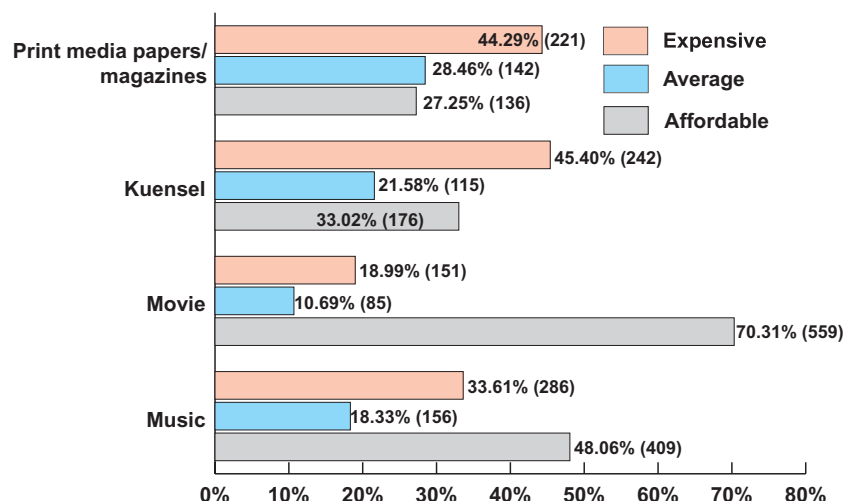


The Internet's reach is being slowed by the high costs involved. The survey found that the dominant factor preventing people from using the Internet is the cost. According to the survey, 50.53%/48 respondents say they find the internet expensive to use. (Section B: Survey Table F1 1).

Overall, people find the costs of print media - newspapers and magazines affordable (Figure 15). 44.29%/ 221 respondents say the print media is affordable, 28.46%/142 find it cheap and 27.25%/ 136 say it is expensive. Specifically on the price of Kuensel, 45.4%/ 242 found it affordable, 21.58%/ 111 say it is cheap, and 33.02%/ 176 find it expensive.

An average film ticket ranges from Nu.40/- to 75/- depending on the location of screening. A majority of respondents (70.31%/559) found movie tickets to be expensive, 18.99%/151 affordable, and 10.69%/85 found the ticket prices to be average. In Thimphu, tickets cost as much as Nu.150/- in one of the newly established cinema halls.

Figure 15: Affordable media/movie/music



Music cassettes retail for an average of Nu.65/ to Nu.75/-. A few selected cassettes are priced at Nu100/- (e.g. Move for Health cassette). The survey shows that 48.06%/409 of respondents found music cassettes expensive, 33.61%/286 affordable, and 18.33%/156 found the costs average (also see Section B: Survey table H14). Many people comment on the poor quality of cassettes /tapes and say that for what they pay, the quality should be better.

Households were asked if they were willing to pay for BBS TV if they wanted more programmes and improved access (Section B: Survey Table C8). This question was included because many people complained about the poor reach of BBS TV and limited local programming. 69.98%/310 said they were willing to pay for BBS TV and 30.02% said they were not. Most of those who were willing to contribute to the costs were urban households (316 urban : 127 rural).

Of those who said they were willing, 41.46%/136 said they would pay as much as the current cable TV fees, 34.35%/113 less than cable TV fees, and only 9.45%/31 more than current cable TV fees. 14/63%/48 indicated other amounts.

Many of the respondents qualified their willingness by saying that if BBS TV provided improved programming in terms of timing, and quality of programmes, then they would be willing to pay some fees. Some said they would not if the quality and timing of programmes remained the same.

The cost of infrastructure services is believed to be high. According to KOL feedback, power and telephone rates are not affordable for the average citizen.

7.2.8 Conclusion

Media access is highly skewed. Urban Bhutan has a relatively good reach of all media. The urban population has a choice of films and music, videos, dvd, vcd, as well as publications. The rural population widely believe that the existing media infrastructure and services are inadequate. The people want the frequency and coverage of the national newspaper and the broadcasting service to be increased. They want more BBS TV time broadcasting popular shows and programmes for the youth. They want BBS TV broadcasts in all the 20 dzongkhags.

With the excitement of TV, radio has been neglected. Internet has led to a reduction in the number of people who read newspapers and magazines and who used to get their news from print media or the radio. Community radio, an increasing global trend where local communities make their own programmes, is yet to be tried out in Bhutan.

7.3 Impact

The impact of the media is as inevitable as the change it accelerates. Apart from the very wide reach of the media, both in terms of the audience and the diversity of influence, the gaps are growing very visible. The media has touched the lives of nearly every Bhutanese citizen but there are gaping differences in its influence on the rural and urban population, the rich and poor, the old and young.

It is important to note that television has had the strongest impact on urban society, especially the youth population, while radio has been the strongest influence on the rural population. The print media, especially Kuensel, reaches the literate population and influences policy makers.

7.3.1 Social change

Lifestyle

The study of a KOL poll in 2000 and then in 2003 shows that the introduction of television and Internet has drastically changed a third of the people's lives. The 2003 poll showed that the life styles of 31.58% of respondents have been changed completely with the introduction of cable TV and the internet, compared with 22.16% in the earlier poll.

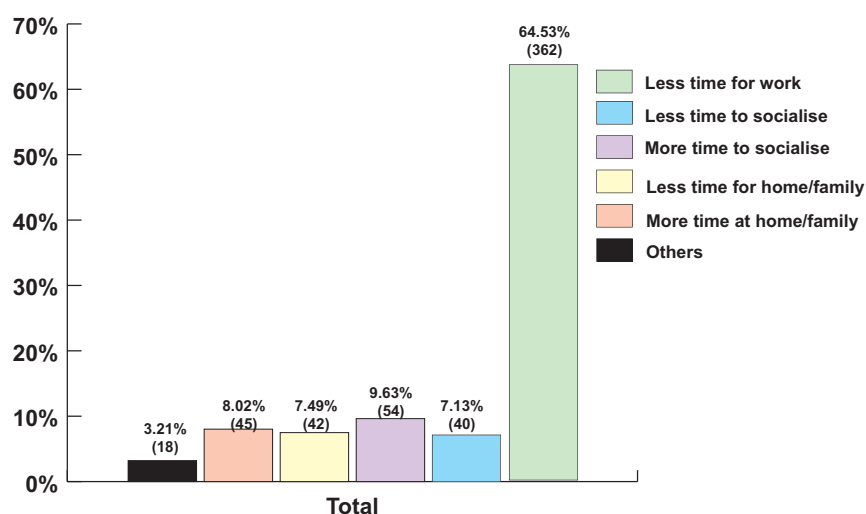
KOL survey: How has your lifestyle changed since the introduction of cable, TV, Internet ?

	2000 survey	2003 survey
Completely	22.16% (37 RF)	31.68% (115 RF)
Partially	41.9% (70 RF)	43.53% (158 RF)
Not at all	31.14% (52 RF)	19.01% (69 RF)
Don't know	4.9 % (8RF)	5.79 % (21 RF)

People changed their basic habits. They are sleeping later at night and adjusting their housework, even of office work, to TV. It is eating into their leisure time, meaning that they are doing less reading or radio listening. Some of the elderly say that they sometimes forget to do their mani because they are so engrossed in the serial on TV.

The survey (Figure 16) shows that 64.5%/362 have less time for work, homework in the case of students. Many families have had to adjust their daily routine to fit in TV viewing in the evenings including delaying dinner and bedtime to watch their favourite programmes. The postive element is that some family members, in most cases the father , who usually went out in the evenings for entertainment now stay home. 9.63% / 54 say they have more time to socialise by watching TV together , while 7.13%/40 say they have less time to socialise. 8.02%/45 find themselves having more time for the home and family because TV keeps them home, but 7.49%/42 find themselves having less time for home and family .

Figure 16: Impact of TV on daily routine



Family relations

The media has had a direct impact on family relations, both positive and negative. A number of families spend more time together because they watch programmes together. At the same time, some families experience internal tensions because of differing interests. A few families install more than one TV set because of different preferences within the family.

People in discussion groups and interviews across the country lament that ever since TV, their families are always so engrossed in watching TV even during their meal times that they do not get to talk as much as they did before they had television. Another family man in Thimphu says he is in despair as his wife is so hooked on Indian TV serials that she has been neglecting the housework, and preparation of meals at home. When the Sony channel was cut due to disputes between cable operators and broadcasters in India, the operators said some men thanked them for disconnecting the service. Complaints about TV taking away the attention of the person responsible for the home is common, even in the smaller towns.

Gups and Chimis point out the need for entertainment to keep young people occupied at home in remote areas and to prevent them from leaving the village. One government official says TV is important as it helps provide some entertainment and may help reduce alcoholism and other vices like gambling.

Values

Television has influenced the values of the urban population, importing influences from the world outside.

TV has changed social behaviour in the sense that public interaction - holding hands, kissing - is more accepted. Local films and BBS TV music videos portray scenes of romance that are made public for the first time with the arrival of TV and the production of Bhutanese film. Until then, romance was often expressed only in poetry, words and music, and not in physical expression on public media. A woman chimi in her 40s observes that cable TV has "broadened the minds and attitudes of society". People feel more comfortable about being seen with friends of the opposite sex.

On kissing and promiscuous scenes on TV the survey finds that 55.61%/312 mind watching such scenes, 36.36%/204 say they do not, and 8.02%/45 RF say they don't know. Some of the adults pointed out that it is embarrassing to watch scantily clad women (which are common on Fashion TV, for example) when they are watching TV with younger people. Many others also say they find it embarrassing to watch love scenes with their family members.

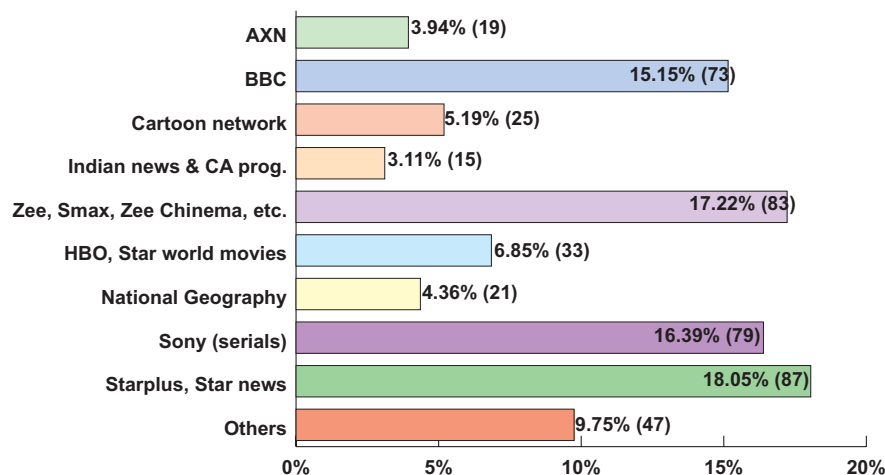
People generally feel that Bhutanese society is not ready to accept explicit love scenes in Bhutanese films.

Violence does not seem to be an issue with many TV viewers (Section B: Survey Table D1.4/ D1.5). 37.08%/ 208 of the survey feel there is not too much violence on TV. 29.42%/165 feel there is too much violence on TV, and 33.51%/188 feel there is excessive violence only sometimes. TV violence is a matter of concern, particularly for the young, and some parents recommend TV ratings as a solution.

An irony of exposure is that women are shown in stereotype roles on Indian television programmes. They are often portrayed as passive objects without an opinion, or as objects of love. The practical role of a Bhutanese woman in a rural setting can be a contrast to the woman on TV. Women in a focus group said that the role of women in Bhutan is to be a good wife, a capable manager of the household, and loving mother. But the same focus group women disapproved of the stereotyping of women on Indian TV series.

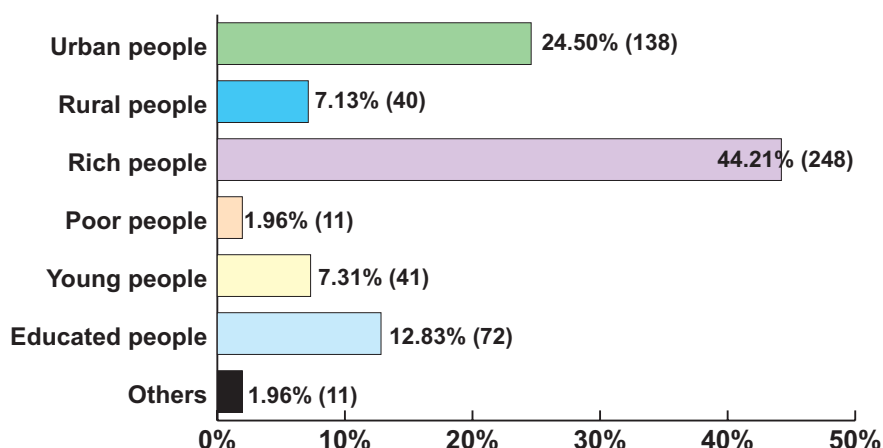
The survey confirms the viewing habit of most people in Bhutan whose favourite channels are the Star, Zee and Sony packages broadcasting from India. (Figure 17) It supports the popularity of Indian films and TV series which reflects the lives of the middle class.

Figure 17: Household's favourite channel



An implication of this is that the influence of an urban class can become dominant and there is little that reflects the views and lives of rural or poor people. Bhutanese viewers will become more exposed to, and familiar with, the lives of people from middle class society - mostly from India. Bhutanese TV viewers generally believe that the TV programmes reflect the values of rich (44.21%/ 248), urban people (24.6%/ 138) (Figure 18). This means that Bhutanese society could potentially assimilate with urban lifestyles more quickly.

Figure 18: People's perception of common values on TV



Youth in one focus group said a positive impact of TV programmes is that it teaches them morals and values, and the importance of good family ties. On the other hand, it also gives people ideas that could be detrimental to society, citing the example of a man pushing his car off the cliff to claim insurance.

Sports

An undisputed impact of the international media is the exposure of Bhutanese audience to professional sports. Apart from the entertainment value of international sporting events, the professionalism of sports in Bhutan has been positively influenced by the telecasting of world sporting events. This is very visible in football. There is also a growing interest in cricket. Children in a community school in Chamgang say they like to watch people playing cricket on TV.

International sports programmes like ESPN channels are very popular, especially with men and students. The sports channels attract a lot of viewers during the Wimbledon, World Cup and other international games. Similarly, Kuensel readers point out that the newspaper should provide more sports coverage (see Section B: Survey Table E8). People keep in touch with global sports even during work hours through the internet.

Children and Youth

In discussing media impact, the impact of television on Bhutanese children needs special attention. Teachers in urban schools observed, since 2000, that students were watching television late into the night. They were, therefore, less focused in class, obsessed with TV characters, and picking up language and mannerisms from Hindi and western films.

Programmes like the World Wrestling Entertainment spawned a small cult in Bhutanese children who developed new heroes like The Rock, Stonecold, Goldberg, and Brocklesnar. Schools claim that they advised parents to restrict children from viewing WWE. Headmistress Jigme Tenzin of Bumthang's Wangdicholing school says one child broke his leg early in the 2003 school year after his friend threw him WWE-style. Film stars are more popular than national leaders.

A volunteer parenting group in Thimphu, started in 2000, found that parents generally believed that the impact of TV was positive and did not see the need to guide children. Unlimited TV is even promised as a reward for good examination results and during school holidays where children often watch TV beyond their bedtime.

Parents and guardians show a relatively relaxed approach to children's TV viewing habits (Figure 19). More than half, or 55.79%/ 313 respondents, said they did not restrict their children's TV viewing compared to 44.21%/ 248 respondents who said they did. Half the respondents (50.09%/ 281 respondents) said they let children watch TV to learn and 40.29%/ 226 to entertain them (Figure 20). 7.84%/ 44 said they let their children watch TV to keep them occupied.

Figure 19 : Restrictions on children watching TV

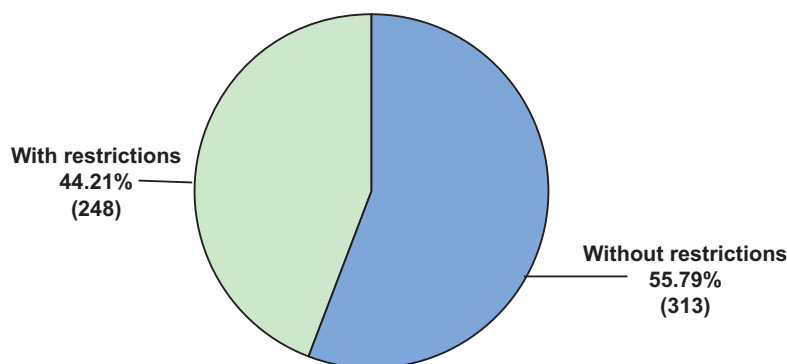
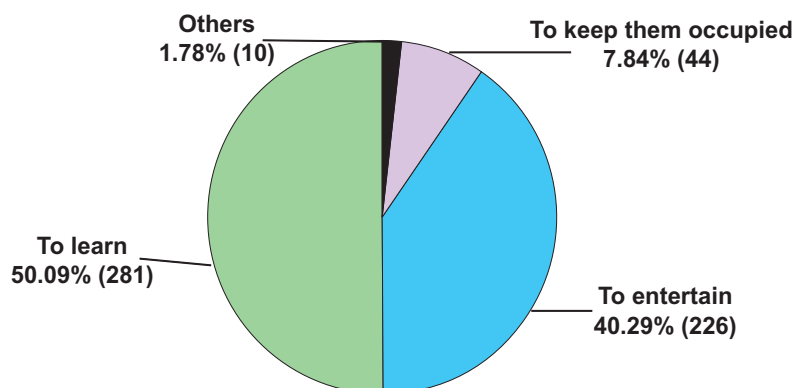
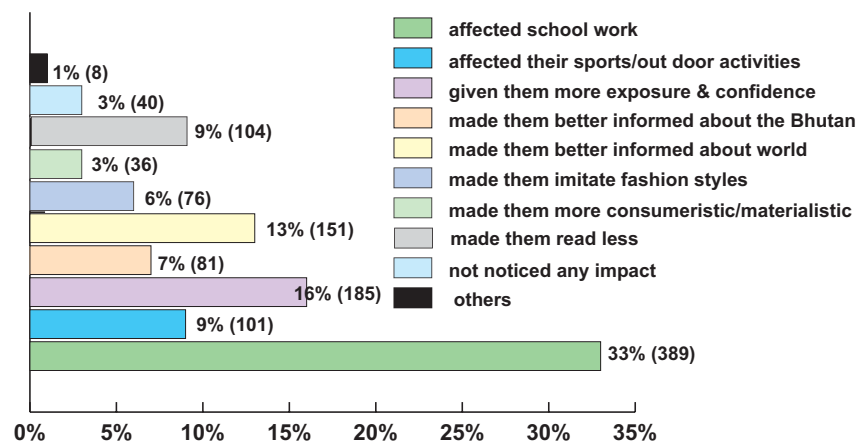


Figure 20: Reasons for letting children watch TV



TV is seen as a medium that gives children exposure and more confidence. Parents in rural areas believe that their children would benefit from the exposure to TV. The most common reply (33.22%) is that TV has affected the younger generation's school work (Figure 21). Many of the respondents explain that it has given them less time for homework. On the other hand, 15.8% of the respondents thought TV has given the young more exposure and confidence, and 12.89% said it made their children better informed about the world.

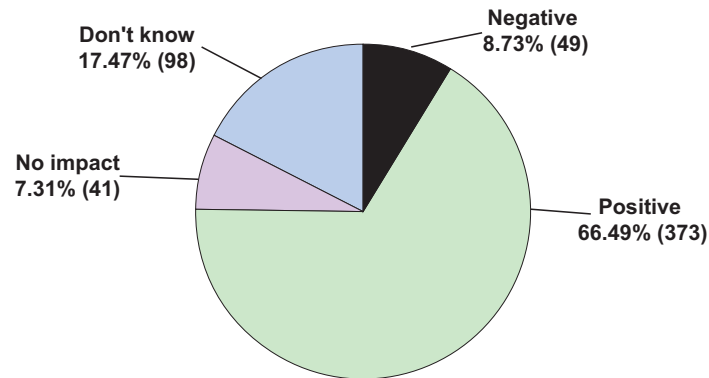
Figure 21: People's perception of impact of TV on children/young people



So while TV may have affected the time spent on study at home, people believe it has broadened the minds of the youth and improved their knowledge of the world. The table also shows that, on the negative side, our children and youth now have less time to spend on outdoor activities such as sports, and spend less time reading.

The Bhutan Communication Authority undertook a random survey of Thimphu town to study the impact of cable television on residents in 2002. The study showed that 90 per cent of teachers and parents felt that cable TV was educational for children, helping to boost the level of thinking and ideas of children and making them more interested in co-curricular activities.

This media study shows that a majority of people, 66.49%/373, feel that TV has a good impact on Bhutanese society. It is interesting to note that this is an overwhelming view as the number of people who responded negatively represent only 8.73%/49 of the sample. 7.31%/41 do not believe TV has an impact on society. 17.47%/98 do not know (Figure 22).

Figure 22: People's perception of TV Impact on Bhutanese Society

In terms of other media, Bhutanese children do not listen to the radio regularly, neither do they read. Most have never had the opportunity to use a computer, and many primary and junior high students have never even heard of the Internet. Focus group discussions with youth in high schools and Sherubtse college show that they read the Kuensel and try to listen to BBS radio to keep in touch with news and current affairs for their studies and RCSC examinations.

Language

The media is known to have changed language. TV has “westernised” English. Email and SMS have abbreviated the spoken language since messages have to be kept short.

Children are learning Hindi and English. A group of students in the Wangdicholing JHS in Bumthang say they learnt to speak Hindi from Indian programmes and films on TV. “Some of our children speak Hindi better than they speak English,” says a primary school teacher in the capital, Thimphu.

The media has helped regional cohesion. A 10-year old Trongsa girl student says she enjoys scharchop music on BBS and has learnt to sing and speak some scharchop. One chimi notes that people in the west are learning Sharchhop with the arrival of radio. In a focus group, chimis said that people in other parts of the country speak Dzongkha much better because of BBS radio.

At the same time, the priorities are becoming confused. One youth in a focus group said that changes in language is most observable especially during parties. “When we meet we want to speak English because we have become ashamed of speaking Dzongkha. We have a concept that those who don’t speak English are “conservative, old fashioned, orthodox-type people. Even among ourselves, we are not very comfortable speaking total Dzongkha.” A majority of families now converse in English rather than Dzongkha. This is also due to

the fact that English is a language of instruction and the new generation of Bhutanese are growing up speaking English at home.

This same generation of English-speaking population are thus able to use ICT and to understand English language media. With English as a language of instruction in schools, it is felt that Bhutan has a natural ability to use the Internet.

E-community

There is already a small but growing e-community, or Bhutanese diaspora, emerging. These are internet users within and outside Bhutan, many of the latter being Bhutanese living in other countries. They socialise and discuss issues. The internet promotes friendship, networking, and one of the more visible impact is that it has enabled Bhutanese everywhere to be a part of the globalisation process, tapping into the information banks, the chatlines, and news and information and potentially, all the services we need as a global citizen. The internet is now a medium for keeping the Bhutanese diaspora together.

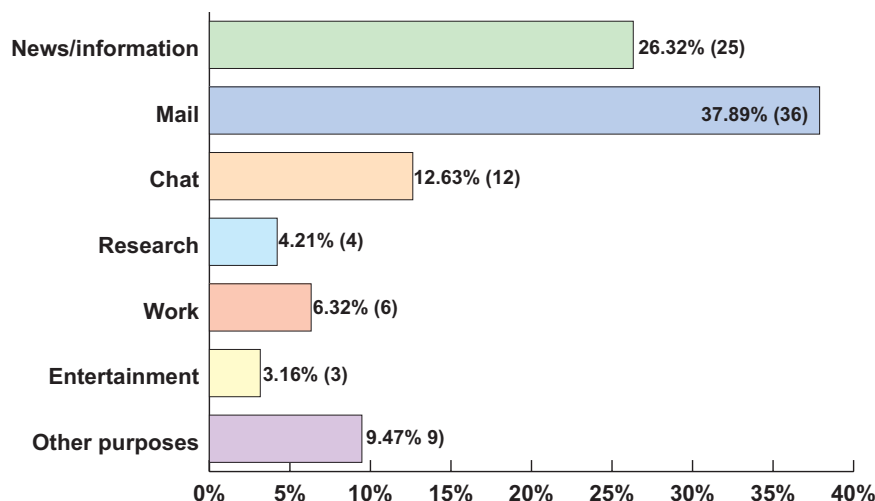
Druknet has a clientele on its chat programme. The peak hour is between 3pm-4pm on weekdays which shows that many are chatting from work stations where the majority of computers are available. Chatting also shows the infancy of Bhutanese e-culture since its usually children and youth who do it in other countries. Chatting is made popular because of the high cost of phone calls which makes the use of office or institutional computer a cheaper option to stay in touch with friends and family. A positive contribution of chat is that it allows webmasters and people seeking technical solutions to be in contact with technical chatsites and to get help to resolve local needs.

There are some Bhutanese “digital nomads”, mobile people who work with laptops. Tele-commuting, which is already happening in some countries, is still not well understood in Bhutan where the civil service work ethics has not gone beyond the realm of physical presence and people’s work output and capability are being judged by their presence at work. The government’s emphasis on e-governance and e-services are all still in a gestation period. With the high cost and limited internet facilities available, people tend to use the internet for email and information access, and very few for research, entertainment or shopping.

It is clear from the survey that the internet is used mainly for email (37.89%/36), followed by news and information (26.32%/25) and finally for chat (12.63%/36). Only 6.32%/6 of the respondents said they used it for work and 4.21percent/4 respondents use it for research (Figure 23). Respondents feel that the Internet is best used for communication (35.79percent/34), for research (20percent/19), and for information (18.95percent/18) (See Section B: Survey Table F9).

Although the Internet is acknowledged as a good tool for research, the use for research is minimal possibly due to limitations in access.

Figure 23: Purpose of use of Internet



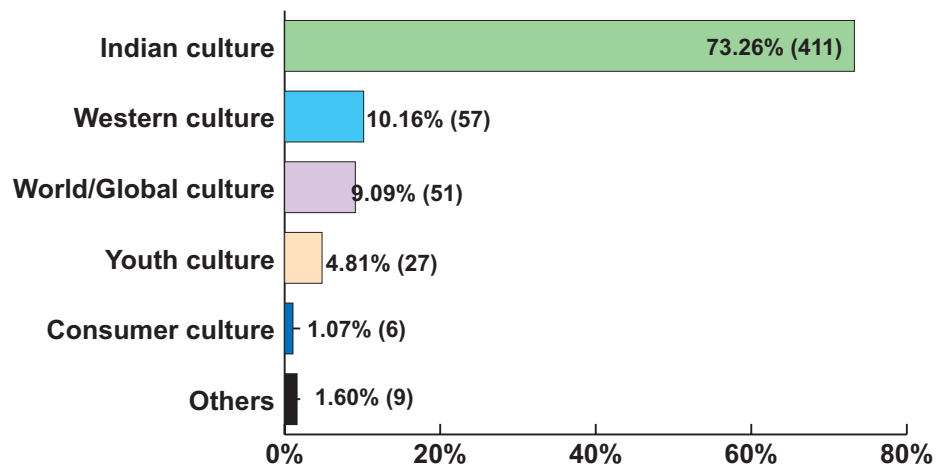
7.3.2 Culture - dilution or evolution?

Because Bhutanese TV is completely dominated by international TV, the Bhutanese audience is learning more about other countries and foreign cultures than Bhutan. Here we see the weakness of the Bhutanese media.

The elderly and the religious, particularly , enjoy CCTV documentaries and programmes on cultural heritage and religious sites. Long used to TV programmes from India, Bhutanese are becoming more aware of China, its people and culture. Arirang, the Korean channel, is also popular among youngsters especially the music programmes, and are thus increasing the popularity of Asian culture in Bhutan.

There are varying views on the cultural influence of television on youth. One section is concerned that society is inclined towards western culture, thereby eroding Bhutanese culture and tradition. The survey , however , shows that the most common influence is Indian culture (Figure 24) But there is also the view that, despite these external trappings, Bhutanese will maintain their own culture.

One section of society maintains an optimism about the survival of Bhutanese culture. One senior government official believes that Bhutanese culture is strong at home, in terms of food for example. Children may be able to sing more Hindi songs, but that does not make them less Bhutanese. They prefer to eat ema datsi every day . The hero and heroine of a Hindi film may appeal to people but it is not diluting culture.

Figure 24: People's perception of common culture on TV

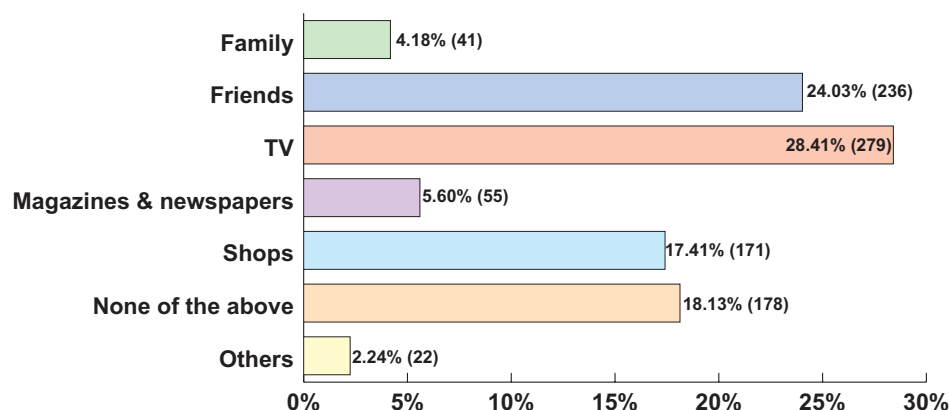
Focus group discussants, including teachers, point out that although they were familiar with Indian films from childhood through videos, they feel that they have not lost their own culture. Given a choice they would watch every Bhutanese film because they represent a culture, language and scenery that is Bhutanese.

The national media has a crucial role to play in reinforcing culture. For instance, BBS TV should have more programmes depicting rural life and the difficulties faced by the people. One chimi said: "I feel that the rural community is totally neglected by the national media. We should know more about the problems in our own homes and not be carried away with fancy things happening in other people's houses."

Women are now buying and experimenting with new food from supermarkets. Many watch the cooking shows on TV, on the Indian channels and Arirang and CCTV, learning new ideas and new recipes, making them more familiar with world culture, and indirectly creating a new culture in food preparation in Bhutan.

There is a common perception that Bhutanese youth and even the adult population are now drawn towards wearing western style clothing because of the influence of TV. Figure 25 confirms that TV has, indeed, an influence on people's dressing. The survey shows that 279 people, or 28.41% of respondents get fashion ideas from TV. Friends also play a part in influencing people's sense of fashion (24.03%/236). 17.41%/ 171 say they get their fashion ideas from the shops which have brought in a lot of fashion clothing from Bangkok and Bangladesh.

Figure 25: Where people get fashion ideas



At the risk of stereotyping youth reactions, the study looks at the relationship between the concept of modernisation and its impact on culture. As Ueda points out in *Culture and Modernization*¹: “In the stereotype, young people are more interested in western music, films and fashion rather than Bhutanese folk songs and indigenous beliefs; they are ambitious, individualistic and materialistic, and want to be rich one day; they like to speak in English rather than their mother tongue.” Youth themselves in focus groups admit that they have picked up new slang, and new expressions. Some teenagers also say that speaking in western slang or with Hindi film phrases is a sign of being “trendy” and modern. A group of recent graduates see a direct relationship between TV and people’s behaviour, dress, and attitudes.

Thimphu youth say they are greatly influenced by “modern” culture, often through the media like magazines and American soap operas. They find the lifestyle and the music appealing. The fact that they can speak English has helped these youth assimilate quickly with new global trends. Designers who participated in a national design competition in textiles in 2003 said they were deeply influenced by designers on TV and in fashion magazines. The high school youth who modelled the designs in the fashion show studied models on Fashion TV before they took to the catwalk.

The real issue is that modernisation can be seen as a contradiction to culture and tradition. The underlying risk here is that if tradition is seen as opposing modernisation, the youth can reject tradition.

But the stereotyped image of youth has also created a new level of equality among them. In the recent past, only the elite sections of society could emulate the media personalities and global taste in dress, language, and lifestyle. Today, it has reached a much wider cross section of society. In the disco or bar, the background of a youth is not obvious, hence a new “equality”.

¹ Ueda A., *Culture and Modernization*, Centre for Bhutan Studies, 2003

Music

The explosion of rigsar music is the most visible trend in the music industry. This is viewed by the older generation as a negative development because traditional music like Zhungdra is fading. But it is seen as a natural development by the younger generation. A 40-year old reasons: "In any case, values change with time. There is nothing wrong with that. Maybe the manner and way of expressing our feelings and emotions have changed with time but it is not as if we have never done this before. We have been expressing our emotions through tsangmo and lozey. To me the modern rigsar songs and the tsangmo and lozey are the same thing. Throughout the ages Bhutanese men and women have fallen in love."

Cultural purists criticise the rigsar tunes for not being true to its name - new tunes. They say the majority of rigsar tunes are direct copies of Indian and Nepali modern songs and there is nothing original in the rigsar. The popularity of music has, however, prompted the emergence of playback singers for Bhutanese films. A music fan observes that Bhutanese women singers are beginning to ape the famous Indian playback singer, Lata Mangeshkar, when they sing film songs and that the new singing style is not Bhutanese.

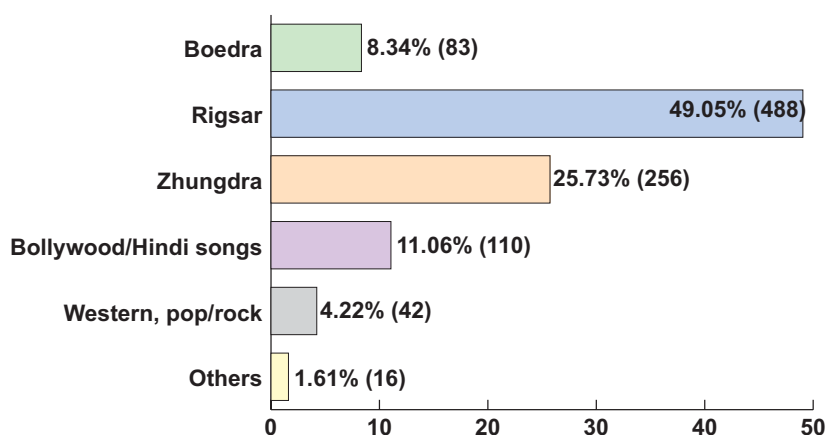
Another new influence on music is the use of modern instruments like the electric guitar, and mostly the electronic rhythm box for Bhutanese music although even the singers and musicians admit that they are all amateurs and the quality of the music accompaniment needs improvement. Rigsar music development can be described as being in an awkward stage of development and needs refinement. But there is no doubting its popularity.

There were 800 rigsar songs recorded between 1990 and 2000. 360 songs were recorded in the past year². Rigsar has overtaken Hindi songs that was the most popular. It dominates social gatherings. One development that is obvious is that rigsar music has replaced Hindi and western music in all the public places, the bars, restaurants, and in the taxis. This is one development that many people support as being good in reinforcing Bhutanese culture.

Rigsar music is the most popular with 49%/488F selecting it as their favourite (Figure 26). This is followed by zhungdra music with 25.8%/256, and Bollywood/Hindi songs at 11.06%/110. Western pop/rock music is the favourite music among just 4.22%/42. Only 8.33%/83 selected Boedra as their favourite music. This confirms the popularity of rigsar music over all the other forms of music available in Bhutan.

²This is common in other regions of Asia where global culture is imbibed and reinterpreted as local culture.

Figure 26: Peoples' favourite music



The survey also shows that rigsar is far more popular among urban listeners while zhungdra has a larger following in rural areas. There are two likely reasons for this occurrence. One, that people in rural areas rely more on the radio for their entertainment and BBS radio plays more zhungdra than rigsar. Rural families also have less access to rigsar tapes. Towns are the only places where new music is sold.

7.3.3 Political - the fourth estate

Bhutanese are beginning to see ourselves more on TV and reading about ourselves on international news available on the internet. People with internet access are now reading about what the world has to say about Bhutan. We find increasingly that the views about Bhutan may not be true. Many young people feel the government is not doing enough in the media to counter bad press. Several young officials say they keep track of Bhutannews.online from Nepal despite what they describe as the generally bias slant on the refugee issue only because it gives them a good perspective of how the international media covers on Bhutan.

The U.K. Guardian³, for example, reported on how TV has led the Bhutanese astray and unleashed a crime wave of fraud, violence and even murder in Bhutan¹. A young government employee said that after reading the article, he has learnt not to believe everything that the media covers.

A senior official admits that Bhutan has always been shy of the media, and have not had a pro-active media policy and that the government could improve in that arena. Exposure to international media has, therefore, made Bhutanese society more discerning about media, including local media.

³ Guardian, Fast forward to trouble, June 12th, 2003

Role

In the context of political changes taking pace in Bhutan, the media is called on to increasingly play the collective role of “the fourth estate”. The pressure is growing both from decision-makers who do take note of the comments in the media and the audience who are demanding more.

One official points out that media has already helped transform the mental outlook of the government and Bhutanese society and led to a quicker embrace of globalisation and liberalisation of the economy. The media has helped to draw decision-makers into globalisation. It is a bold change for a country that’s been going the other way for the past 40 years. The change in our mental fabric and the loosening of our mental outlook is linked to TV and the media.

With terms like tele democracy emerging, good governance is challenged by e-governance. Local government leaders in rural areas want more. Some started reading the Kuensel only when they were elected as chimis because they have to keep abreast of developments. They want to know, almost immediately what has taken place in the capital, what the government says.

Some chimis sense a regional imbalance. Rural leaders in eastern Bhutan say that they feel they are behind western Bhutan because they receive Kuensel later.

People see international TV as a window to the world, enhancing awareness of international and regional politics. Children in Trongsa say they learnt about people paying “baksheesh” in India, and that there is bribing in democratic elections. Chimis point out they learn a lot about Indian democracy and politics from TV. Teenagers in a focus group say that it helps them understand the globalisation process as they understand the world better.

Speech

The Internet has been called “orderly anarchy”. An aspect of the new media is that it breaks the boundaries of social norms. People, sometimes behind the shield of anonymity, discuss issues that were previously considered sensitive.

KOL is a case in point. After initial protests from various sections, society has accepted and even appreciates the value of open discussion. More than 100 registered users on KOL exchange views and discuss a wide variety of topics. The average KOL user is a Bhutanese male between the age of 21-40 years. A 2003 poll among users showed that professionals and civil servants make up more than half, or 55.8 percent, of frequent KOL users. Students make up a third, or 31.17% of those polled. (Source: Kuensel poll)

A senior government official reads KOL regularly for the following reasons:

- * Gives people an opportunity to share views on topics that interest them
- * Tends to correct us where we were going wrong. Useful feedback.
- * Reminds us of our responsibilities.
- * Gives me the push to take action and people also accept the action based on public feedback.

An internet user: “KOL is very good. I always read it. It gives people an opportunity to say something although sometimes it is immature but it is important for the government to read it because it says what people feel. I sometimes write back if I think it is unfair or to correct an immature view .”

The norms of free speech are loosening every year even in the mainstream media. The National Assembly discussions are an example. Both the debate in the Assembly and the coverage of the sessions have visibly opened up. In 2003, the Assembly debate on Personal Income Tax and Kuensel’s coverage of the discussions broke new ground in media openness.

Government officials admit that it is easier to get the attention of their own bosses through the media than through direct contact. Today, officials say Kuensel is already more effective in getting the attention of policy-makers than the administration or bureaucracy .

The media has created a new arena that goes beyond national boundaries. BBS radio reaches Siliguri, Assam, Arunachal, Nepal, etc. BBS radio receives about 300 letters from this region each week. Cinemas in Bhutan serve large audiences from neighbouring communities in the Doars, tea gardens, Jaigon, and the Bogaigaon area outside Geylephu. There is a potential for communications and for Bhutan to promote greater understanding and exchange through the media.

7.3.4 Economy - media as a business

E-culture

“My life has changed completely since the Internet,” says a 51-year old businessman who says he gets up at 4.00 am and logs on because it’s the best time to access the world wide web. He spends 100 hours on the internet every 20 days, or an average of 5 hours a day , accessing almost every topic he wants from electronics, to finance. He also has a small e-business, selling Bhutanese handicrafts although he says he spends more time answering queries than selling crafts. He is called “the ambassador of Bhutan” by the friends he’s made on the Internet.

A businessman in Dechencholing, outside the capital town, does an

import business with a company in Europe without having to leave his village. He places his orders through email and uses it to check on developments in the business.

Yet another e-business venture set up in 2002 to sell handicrafts closed a few months after it was set up because of the lack of technical support, high running costs and the difficulty of receiving payments in foreign exchange. These examples show that our internet experience, being relatively new, needs a lot more support.

Internet can give Bhutanese quick access to prices, products and services. The development of E-business and E-commerce, however, is still just a vision in Bhutan where there are many limitations to using the net for buying and selling. A whole new environment has to be created to make e-business possible, including structural adjustments in our banking and finance system, and distribution systems to speed up delivery of goods.

There is increasing interest in setting up e-commerce in Bhutan, particularly for its niche products like weaving, organic produce and essential oils.

It is expected that ICT will create 3.3 million new jobs in Asia in five years. The Ministry of Employment and Labour has also been looking for support to establish an interactive website for employment.

The development of the Dzongkha unicode for Microsoft will enable Bhutan to increase local content that's relevant for a large section of society that's currently hindered from using the Internet because of language barriers. It will see a boost in the use of the WWW, and help preserve culture and texts.

Employment, and Media as a business

The government sees ICT and the information sector as an important opportunity for employment generation. This is combined with the policy thrust on private sector development and incentives for private entrepreneurs to go into the ICT industry. With 75 percent of the economy in developed countries dominated by the information sector, ICT is globally accepted as the business of the future.

In Bhutan, Film and Music is emerging as a relatively profitable industry. There is a large local demand for Bhutanese film and music, although the industry says this demand is confined to the capital and residents of major towns like Phuentsholing, and Paro. Film producers also see these as the more lucrative markets because of the ability of residents to pay. "Chepai Bu" has so far grossed Nu3.5 million since its release in 2001 making it one of the most successful films so far. The smaller towns do not receive many music tapes because the market

is not profitable enough without reputable established distribution systems where payments are guaranteed.

With 43 licensed audio-visual production companies, the annual investment in films alone is a multi-million ngultrum industry (with film production costing an average of 1 million ngultrum per film). The film sector provides employment to a small, but growing number of freelance camera crew, actors and production staff.

Music production is developing at an even faster pace than film and music producers and composers say competition is picking up. In the week of Sept 22-28, 2003, there were four new rigsar cassettes released into the market. Producers are known to go for cheap productions when making cassettes and the quality is not good. Today there are more cassettes in the market than the customers can absorb.

BBS, with the best facility, charges higher rates while private studios charge less but the quality is poorer. There is no technical support and sound engineers and only a few trained musicians.

Although some music producers feel that the market is already saturated, there are still people venturing into the business. The competition is expected to result in better quality productions in the long-run. As spokesman from the Motion Picture Association describes the emergence of some "briefcase" music producers, implying that there are people who produce music cassettes for sale without licenses. The MP A is trying to streamline this and is attempting to get music producers to work with the Association in keeping track of developments and in registering the number of audio albums made each year.

With advertising picking up, there is interest in the private sector to start new media. Cable operators are already trying to be broadcasters and broadband providers, and there is interest in the print media.

The media has affected the video rental market which now rents only the latest films. In Thimphu the start of television reduced the number of video rentals from 21 to three. One shop said that its income dropped from Nu. 2,000 a day to less than Nu. 400.

While there is an overwhelming demand for BBS TV, especially from the rural areas, people are also beginning to realize that they have to contribute to the costs of bringing the service to them. Focus group discussions with a cross section of people, from farmers, monks to public servants all say they would be willing to pay for the service if they had to. But it is the urban residents who are able to pay for the service.

With the limited average earnings of rural people, it is evident that

the spending power will remain among urban communities. In providing entertainment and media services, there is a natural pull towards urban towns where there are more people and hence economies of scale and spending ability . This could lead to a greater gap between those who have information and entertainment options and those who do not.

Consumer culture

With the media introducing a new level of materialism to Bhutan, the growth of the consumer culture is a concern, both from the cultural and economic points of view .

Young children today say they buy soaps and shampoos by their brand. Many say it is good to watch and read advertising to help them find goods and services, and to help them make up their minds. A few say that not all advertising tells the truth. One said that dandruff shampoo, for example, does not cure dandruff and does not work. Most say they've switched shampoos and toothpaste because of advertising.

Teachers point out that some advertisements have a good impact. Toothpaste ads, for example, have prompted children to brush their teeth and to use toothpaste.

Overall, advertising has an impact on people, with many people saying it has prompted them to buy or to seek the product or service advertised. The survey shows that advertising attracts people (D1.7). 65.72% or 372 respondents said they like the advertisements on satellite/cable TV compared with 34.28% (194) who did not like the advertisements.

BBS radio has limited advertising (See Survey Table B7). Many of them are social messages or advocacy campaigns. 48.3 %/ 383 say they listen to radio advertising and of this number , more than a third or 36.29%/ 139 say BBS radio advertising has made them want to buy or use the products and services advertised. There is potential, therefore, for BBS radio to exploit advertisements and to use it for promoting beneficial causes such as health and social messages. It also presents opportunities for BBS radio to expand their local advertising.

According to the survey (Table C5) 57.4% / 252 watch BBS TV advertisements and 42.6%/187 do not. Advertising on BBS TV has some impact on viewers with 51.59%/ 130 saying that it has made them buy or use or at least want to buy and use the products and services advertised.

Advertisements seem to have some impact on Kuensel readers (Survey Table E9) with 36.01%/ 202 stating that the ads prompted them to

either buy and seek, or want to buy and seek, the products and services. Most of these people (64.3%/ 130) are living in urban areas. This is because many of the services or products advertised are generally from urban establishments and target an urban population.

With the request for Kuensel to provide more notices and tenders, there is potential for Kuensel to aim its advertising towards the government and corporate sector where employment opportunities and contracts and of ficial notices originate.

Advertising has also been good for business and has been educative for shopkeepers. Many say they used to be totally dependent on Indian distributors and suppliers, and often did not have any idea what goods are available. W ith TV today , they are able to understand better the range of goods and services available and are able to order the latest variety of goods and services.

Shopkeepers in the Dechencholing village, for example, say their goods are selling better after the introduction of TV. People come asking for the latest products available and hence, they are better able to stock goods that customers want. Shopkeepers note that children are more aware of what they want, asking for things they see on TV, including the free gifts.

Many male youth say they enjoy watching the car advertisements and one even wished Bhutan would manufacture cars so they are more af fordable. Housewives are interested in television consumer programmes. As early as 1999 and 2000, many housewives have been able to describe in detail the goods of fered for sale on TV, mainly household appliances. A youth in his early 20s says he was convinced by the advertisement on TV and bought himself a latest model of motorbike.

In short, word of mouth is not adequate anymore, whether it is to sell a product or service.

Cable TV has also contributed to government revenues. The revenue generated from license fees are as follows:

Cable TV license revenue

Year	revenue generated (from License fees)
1999-2000	12,88,425.00
2000-2001	18,03,053.00
2001-2002	8,71,330.00

Source: BCA, 2002

Case study 2: Views of a farmer in a remote area

Personal profile: male farmer in his late 30s. Home: Gasa geog

Media access:

“Radio is a very popular medium in the village. When the radio broadcast time was increased some years back, people were very happy and excited. These days people living in high elevation areas prefer to buy transistor radios with FM frequencies because it can catch broadcasts from Thimphu. TV

Only a few people have tape recorders or audio cassette players in the village. These machines consume batteries very fast and people think they are not economical.”

People in Gasa have no access to TV, newspapers, or film. Letters take one month to arrive

Preferences: Most people like all the programmes on BBS radio. Young people, particularly , prefer song and music programmes.

Impact of the media: “The media has brought us many benefits. It has educated us. We know a lot of things through the radio. Even with radio people’s awareness and understanding of national policies and issues has changed. If we have TV in the villages the impact will be far greater . Then people can see things with their own eyes. TV makes things easier for people to understand.”

Assessment of media:

“No doubt it has benefited us but some of the things that have been happening in the media make us very suspicious. We hear only about good things. The remote areas are totally neglected. Two thirds of what the media says is all about the government. There is nothing about the humble farmer , about his problems and difficulties.

We hesitate to express anything against the authorities in the media. Firstly they may take action against us and then they won’t even listen to us.

I believe only 50 percent of what the media says. For example we hear about the success of many development projects which are supposed to benefit farmers. I suspect this is true only about projects involving small amounts. As far as projects involving big amounts are concerned, I have my doubts. For instance, let’s say a school is being constructed. Then BBS and Kuensel will say farmers will benefit by participating in the construction. But there are contractors and there are officials in between. I don’t know who really benefits.

The problem is that we do not have many newspapers like in India or other countries. For example if there is another newspaper in our country then Kuensel' s mistakes will be pointed out by that newspaper .”

Role of media:

“With decentralisation of power and governance, we have been made responsible for our own affairs. Even people in the villages, especially local government officials, need to know a lot of things. The media should educate us.”

CHAPTER 8: The credibility of the Bhutanese media

Overall, the Bhutanese media has a steady audience but the demand is growing. There are mixed reactions to the credibility of the government-owned media (radio, TV, newspaper). The majority of people, or 90 percent of the survey, said they found the media believable in general. But they are differing views on closer studies.

For the educated elite, the credibility is very low. For the urban population which has access to other media, the content is inadequate. For the rural population, the access is limited and the people feel unrepresented. For the private media (film, music) the standards are also seen as being generally low among the educated audience because they are seen to be emulating Bollywood. But they are popular among the rural audience.

8.1 Feedback from the people

On the role of the media, the people sometimes have firm views, but are not necessarily coherent and usually stem from personal experiences. Many people are unaware of the influence of media content in its varied forms. People are generally not aware that they can play a role in shaping the growth of the media and influencing its role. A majority do not provide feedback although they do have views.

In a generally hierarchical society, many people feel that they are not in a position of authority to express their views. But that is changing, especially among youth and local leaders who are more exposed to the new participatory processes of governance.

There are two schools of thought regarding the credibility of the media. One that largely stems from rural communities is the accepted belief that it is a channel of information from government. “I think the media portrays the true state of affairs in the country. Since media is part of the government I don’t think it will tell lies. I cannot imagine the government lying to the people,” says a Chimi.

The urban elite, however, find local programming and newspaper coverage limited. Some put it down to government control. “Our media is gagged isn’t it?” says a businesswoman in her late 30s. A majority would like the media to be more pro-active but blame the government rather than the media. “Every time there is something written there is such a lot of hue and cry. We can’t blame the media, they have to survive,” says another businessman. Now used to the quality reporting of international media, Bhutan’s urban elite has more sophisticated expectations of the media. An increasing educated population is also beginning to question the overall credibility of the media.

Others feel the media is too inclined and biased towards urban centres. They feel that some regions are thoroughly neglected.

A local leader says: “Our people want to see and listen to a media that is our own and which is freely and widely available. We should not underestimate the positive impact that media can have on rural communities. I feel that the benefits of the media will always outweigh its negative impact. In fact it will be more harmful if we do not have a vibrant media. It will be more harmful if we do not have a vibrant media. The role of the media becomes even more critical with the political changes now taking place in the country.”

A common view expressed by the chimis, in a focus group, is that the existing national media, specifically Kuensel and BBS, is too controlled. It is blatantly pro-government and does not portray the true state of affairs. It does not reflect the voice of the people. They feel that the rich and the powerful receive preferential treatment. They want the problems and difficulties faced by the simple people to be given wider publicity. They want the pictures and names of all criminals including those related to the rich and the powerful to be printed in the national newspaper.

8.2 Feedback from media practitioners

The media professionals themselves feel a growing pressure. Government officials think they are too critical and the people think they are too mild.

In a system without the tradition of a written free press, government officials expect the media to play more of a public relations role. Senior officials expect reporters to listen to them. “What is that reporter’s name ?” a government official asked a Kuensel editor, implying he would like to reprimand the reporter. An army officer has threatened a Kuensel editor. “We are a friendly watchdog. We have no bite,” says a broadcast editor in his 30s who admits that he avoids controversy to avoid “getting into trouble”.

There is also a tendency for civil servants to act as if they own the media and that the media should report what the sectors feel are important.

On the other hand the people are also getting more aggressive. Rural leaders have come to Thimphu to protest against negative news on the elections. The media has also been sued. But it is more common that people plead for certain news to be left out. All these, however, are done for personal reasons, mostly to “save face or reputation”. Objective feedback is limited.

Reporters often find it difficult to obtain important information from government organisations. Officials are generally too intimidated or not allowed to talk to the press. There are a number of sensitive areas which the media find difficult to cover such as national security.

Broadcasters in a focus group discussion say they feel that the credibility of the radio has been affected with the introduction of TV because their attention has shifted to TV news and programmes and they unconsciously regard radio as being of secondary importance.

National interest, an age-old excuse, is cropping up in Bhutan as a control mechanism on the media. But there is a confusion – or intentional misinterpretation - between national interest, government interest, and the personal interest of an official.

Journalists however, do express satisfaction in being able to make a difference. They also feel that local communities recognize the contribution of the media on such occasions. This helps to reinforce their commitment to their work. Kuensel journalists are more satisfied with their role than broadcasters.

A senior bhutanese journalist feels that this is a natural development and that the media reflects the stage of development of a changing society. What is important is that in policy, the government has emphasised the role of an independent and responsible media.

8.3 Outside Perception

The following are two perceptions and views from the outside.

Press freedom

In an annual survey of press freedom worldwide, Freedom House¹ rated the Bhutan media “not free”, giving them a restriction score of 80 out of 100.

The level of press freedom is measured using 4 criteria

- 1) laws and regulations that influence media content
- 2) political pressures and controls on media content
- 3) economic influences over media content
- 4) repressive actions

On the basis of this criteria, there is no nation in South Asia within the “free” category.² Five countries fall within the partly free category in South Asia — Sri Lanka, India, Bangladesh, Nepal, Pakistan together with Indonesia in southeast Asia. Bhutan and the Maldives are in the “not free” category.

¹ Handbook of the Media in Asia, Shelton A. Gunaratne, Sage Publications 2000

² The free media category in South east Asia include Thailand and the Philippines. In East Asia, Japan, Taiwan, South Korea, and Mongolia also fall under this category.

Although such a survey may not be entirely accurate, it is a reflection from the outside and how the world assesses the credibility of Bhutanese media.

An evaluation of Danish support to the media worldwide includes a mention of support to Bhutan's policy of establishing an independent media. The report describes the corporatisation of BBS and Kuensel. "The intention of removing these media from the government's sphere of control was clearly to promote independent and professional journalism. However, taking the unstable political situation in the country into consideration, there are certain limitations to the way the press functions. Although a free and open political debate is still not assured, an increased professional standard is obvious."

The challenge for the media is to continue to liberate itself from the government and to become truly professional and independent in their reporting. The two media institutions must encourage public dialogue and participation as part of the democratisation process of the country. This, the report says, is a policy of the government and it is widely recognised that the media must play a vital role in this process.

Conclusion:

The role of the media needs to be clearly defined, especially within the changing political landscape. Legislation, including content legislation, must move into place. Legislation must define national interests and sensitivities. For example, Bhutan could adopt Thailand's policy of protecting the sanctity of the King, or Danish media's unwritten policy of protecting the privacy of its royal family.

In short, the media should play the traditional role of the media known all over the world.

CHAPTER 9

Recommendations

9.1 Introduction

With Bhutan entering the information age, the government has turned its attention to the development of the media. What is immediately apparent is that it is a major responsibility, not just for the government but for media professionals, lawmakers, the educated section of the population, and society at large. In the light of the political changes taking place, civil society has a particularly important role to play.

Since the mid 1960s, the Bhutanese media has seen rapid development. Without written policy or legislation, it has grown in professionalism, guided by the government which also established the infrastructure and invested in HRD. With the population growing increasingly literate, the media professionals have had to “sense” their way towards greater professionalism.

At this juncture the government takes the media into a new era. It will refine policy guidelines and is poised to introduce comprehensive legislation. Its involvement will need to continue as it assumes the role of regulator and to support media growth by updating policy and legislation and supporting infrastructure. All these specific responsibilities would be aimed at ensuring the healthy growth of the media. In response to important changes like the drafting of a Constitution, the government will need to ensure that the media will play a positive role in national development.

To draw up broad recommendations, this study has interviewed political leaders, bureaucrats, a wide cross-section of people that the media serves, and the media itself. It has drawn views from decision-makers, urban and rural representatives, children, youth, monks and teachers, women and the elderly. Their feedback and comments have been analysed to study the impact of the media and to assess the priorities that need to be addressed.

9.2 Recommendations

9.2.1 Access

- It is evident that infrastructure, which determines the reach of the media, needs attention as many people do not have access to media. As power and telecommunication services reach out to the unreached through the government’s emphasis in catering to the rural population, equipment and production materials for all media need to be accessed. The ministry’s initiative to share telecom and power technology and converge media services could be an
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effective experiment. There is a greater need for closer coordination and cooperation among the sectors like power and telecom.

- Urbanisation escalates the demand for entertainment and information. In developing facilities and media access, the government needs to balance access with an emphasis on rural communities to avoid widening the already existing urban-rural gap. Infrastructure is being subsidised but equipment and media services for rural areas need to be subsidised through tax policies, multi-media centres, and other forms of subsidies.
- The establishment of BBS's multi-media centre in Bumthang needs to be evaluated to draw lessons for reaching other districts with similar facilities. This model could be expanded to include community viewing facilities, libraries, where the Kuensel and other relevant books and periodicals are available such as public media access centres. To make multi-media centers workable, the Ministry of Information and Communication needs to collaborate with other sectors in promoting media access in an integrated manner. Collaboration could be sought to develop media centres with Bhutan Post (planning e-post), and with the Education sector (planning education resource centers) to strengthen the community resource centers, or telemedicine services.
- The government's e-governance and e-service policy needs to be backed up by better access to the Internet. This means making access easier through cheaper computers and cheaper Internet costs.
- Given the high cost of hardware and the maintenance environment, low cost technology should be encouraged for the low end market.
- The government/local government should encourage the establishment of small cinemas or professional screening centres wherever feasible for films, concerts and other entertainment to reach rural communities. Today, film producers complain that they have to carry projectors and sound systems and even chairs for the audience to screen films.
- To reach the disabled, innovative ways need to be sought to expand media access for the disadvantaged such as reading the Kuensel on radio for the sight impaired, the illiterate, and people living in areas which do not receive the national newspaper. An experiment with computers for the sight impaired to be implemented at the National Institute for the Disabled in Khaling need monitoring and evaluation and lessons learned can be replicated.

9.2.2 Content: Develop a "Bhutanese" identity in the media

- Given the strong presence of the international media and the
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growing impact of the Bhutanese media, the government should provide the media community with a better understanding of national priorities through regular briefings so it is reflected in the national media. Within the overall parameters of a free media, the government should discuss national policies and priorities to develop a strong sense of the national identity.

- The development of Bhutanese content programming in print, broadcast, film, music, and the Internet need to be encouraged, even subsidised. In promoting cultural, social, and traditional value systems, media institutions must be encouraged to define their own strategies to promote national interest, priorities, standards of decency, social sensitivities. Guidelines must be clearly drawn up on issues like pornography, sex and violence in the audio visual media.
 - Co-production with regional media houses could be one strategy to reduce the cost of production of relevant educational programmes.
 - As Asian countries like India have done with success, dubbing of selected regional and international programmes would be a good strategy to develop relevant content. There is a good choice of international and regional programmes that are very popular among the Bhutanese audience, including programmes on Buddhism. These could be dubbed into Bhutanese languages for broadcast.
 - Media organisations need clear guidelines and rationale for covering sensitive subjects like the royal family and national security. The government cannot dictate but can promote social issues like AIDS awareness, and drug and substance abuse prevention through a transparent information system. It would be a great help if the government's media briefing system is improved.
 - With a strong commercial drive, ICT and media related policies are being aimed at those with purchasing power. For Bhutan, it is important to consciously include Bhutanese youth in all policies.
 - A strong research capability is critical or there will be too many myths in ICT and the media. For Bhutan, without adequate experience, it is important not to rush into judgments without understanding the issues. Apart from regular audience surveys, studies are needed to understand media effects on children, on youth, to understand the gender representation in media content, and the overall effectiveness of media messages. Equally important is research into how the media works, what influence they have, and what in turn influences them. Financial sustainability issues also need more study for media development.
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Media's role

- The media needs to depict more rural problems, rural views and challenges. There is a tendency to cover more Thimphu-oriented developments which have the indirect impact of neglecting events and people in other districts, and make Thimphu more appealing to rural people.
- Gender policies must encourage women to join the media as professionals as a means of getting some gender sensitivity in media productions and articles. More attempts should be made to feature women in content. Producers, journalists, editors, camera men and photographers should be trained to be sensitive to gender stereotyping.
- Overall, there must be more analysis and depth in reporting. More issues should be discussed. Programming and content have to be less didactic, more interactive and entertaining. Media practitioners and policy makers alike must become pro-active instead of just reacting to media developments.

9.3 Specific considerations

9.3.1 Governance

- At this stage of development the media and consumers can be educated on the role of the media in the political and socio-economic developments taking place. There a number of steps that the government could take immediately; some of them are listed below.
 - Improve media access for rural leaders. Information has become crucial for chimis and gups, especially in the light of current political development. The local leaders themselves feel deprived because of a lack of information and say they need to know instantly what is discussed in the capital. This could be done through the local government offices.
 - The government should start a government news bulletin/newspaper and more relevant websites to provide civil service and government news and information. The time is right for the Ministry to initiate the publication of a government gazette or newsletter for civil service news. This is becoming more important because Kuensel and BBS, as media, will cover less government news and the bulk of the civil service is not informed about government activities.
 - The government needs to be media-friendly. It needs to contact the media more often and be more pro-active. There is a need to
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educate the key actors in the government (spokespersons) to speak out, and to train the departments to generate information.

- The government needs a more active approach to protect and build its image in the international arena. This would be done through regular contact with international journalists.
- Legislation, including the copyright law, must establish a healthy environment for competitive media involving the private sector.
- Data/statistics on media equipment, import/export figures need to be improved to provide more accurate data for future analysis. Today, for example, the Department of Revenue and Customs registers TV sets by weight and total values, and the Ministry of Trade and Industry records all small stationery shops as bookshops.

The media has specific responsibilities in governance

- The media should also train producers and reporters to be more effective and active in reaching out to all areas of the country. It needs to promote regionally balanced news to counter the current complaints that the media is too Thimphu centric. There is a need to strengthen regional bureaus, train reporters and ensure a balanced representation from all parts of Bhutan. This will help assimilate the people of Bhutan and make them feel as one. The media must also be conscious not just to report on bad news from the regions.
 - So far the media has talked about what the government has done, now they should talk about what the geogs are doing. With not only power but money being decentralised, there is breeding ground for corruption which should be watched.
 - The media needs to reinforce the ideologies of democracy and decentralisation. The media needs to provide forums for discussion and debate on all important issues including the Constitution, the role of legislature, judiciary, and the executive, the search for happiness and the definition of rights. Media also has to encourage people's participation in media development.
 - The media in Bhutan, in today's context, has the role to build civil society, provide the information to enable people to make informed choices, and provide the diverse content to promote culture and acceptance of a changing culture.
 - If public service broadcasting is the guiding directive for broadcasting, BBS will have obligations to provide a wide range of content to reflect different tastes, views and interests. Public broadcasters are expected to be guardians of public interest. It will need to adopt a mandate to provide for diversity and pluralism, to
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promote social integration and a sense of national identity in the political and cultural sphere and to maintain independence from sectarian and commercial interests.

9.3.2 Economy

- It is widely accepted that public service obligations are important priorities for the media. The Kuensel, for example, has been pressured to continue the Lhotsham edition despite an unviable readership. Kuensel's balance of social and political obligations and commercial interest is an important issue in the context of the sustainability of the media.
- Electronic media is notoriously expensive, leading to the subsidy of even the BBC in the UK and PBS in the US. BBS provides an important means of reaching people with essential information and has decided not to pursue an aggressive advertising policy so as not to be overtaken by commercialism. Such a policy will require financial support.
- Given the people's reluctance or inability to pay, the government's policy must facilitate sources of funds. This could be done through donor assistance or preferential business opportunities.
- There is potential to raise revenue through advertising. Local advertising must be stimulated so Bhutan is not swamped by advertising from outside. The advertising industry is also a market for employment. There is potential to emphasise local advertising content.
- The government and media organisations need to draw up an advertising code of practice to ensure a balance between public service obligations and commercial interests. For example, the largest advertisers are the tobacco and alcohol industry, both contrary to Bhutan's policies.

9.3.3 Professionalism through education and training

- The Bhutanese audience is now used to the slick productions of international TV and radio, film and music, newspapers and magazines. There is no choice but to compete. This is one of the challenges to the credibility of the Bhutanese media. Promoting human resource development with limited resources is one of the biggest challenges in Bhutan's media development.
 - There are a number of training institutions in the region which conduct training both in-country and outside. For Bhutanese journalists and media professionals it is important that they are encouraged to travel outside so that academic training is
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complimented by exposure to the media environment.

- The media must be a priority in the government's/and Department of Employment and Labour's HRD programme.
- In-country training expertise also needs to be built up. BBS, for example, needs to establish a good training centre to conduct regular in-house training. Media organisations could collaborate with regional institutes, and the process of training trainers need to be strengthened to become a sustainable activity.
- Journalists should not be viewed as a service to cover events, they must be encouraged to learn and understand the issues they cover in order to provide good analysis and credible reporting that will ultimately build a more informed society.
- Media should also conduct its own independent reviews/evaluations to keep pace with change.

9.3.4 Education

- Development journalism has always been relevant in Bhutan's context. Media can be used to compensate the limited number of teachers, teaching aids and texts. Schools, institutes and even non-formal education centers can benefit from educational radio and TV programmes and websites and distance learning programmes.
 - Media literacy is essential for youth. The Internet, for example, is a new world to many children and it is crucial to get the optimum benefits from the media. Similarly, it is necessary to introduce media literacy at all levels of school to prepare youth to make informed choices and also to enable some of them to join the media industry.
 - The popularity of the literary page in Kuensel shows that there are creative young people who enjoy writing and drawing. They need to be encouraged from an early age. Schools can produce newspapers and the younger generation must be encouraged to write, discuss issues of importance, and to voice their concerns and interests. This will help to promote greater participation and groom a generation to become more active in the country's decentralisation process.
 - Similarly, schools and institutions can produce magazines, simple radio programmes, and can be encouraged to set up and manage their own websites.
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9.3.5 Providing a supportive environment

- Apart from awards which the DDA today gives the film and music industry, the government could institute a system of providing grants to support local writers, producers, scriptwriters, actors, musicians, graphic artists and the whole range of creative personnel to make the media a vibrant profession and industry.
 - Given the tendency to copy Bollywood/Hollywood productions, the thrust here should be originality in local content. Music and film are powerful media that must be tapped. It is time to plan for professional schools for music, film, photography and journalism.
 - The development and training of supporting industries such as electronic maintenance, computer software programmers, printing press technicians are all critical for the sustainability of local media and the entire ICT industry.
 - There is a need to prepare for the possibility of foreign partnerships with regional film production houses for example, in local productions. Here, policy should ensure that the Bhutanese film industry benefits from such alliances, rather than selling Bhutan strictly as a location for shooting.
 - The regulations and the filming application process for foreign film and documentary productions must be streamlined. This should not be a responsibility of the Tourism Department because filming is not tourism. It should come under the information sector that is more sensitive to media impact.
 - Given the popularity of watching films on TV, broadcasting of local films on BBS TV should be encouraged in a manner that benefits the viewers, the broadcaster, and film producers. (Most film producers do not make available their films on videos or other formats because they do not want to risk piracy of their films and copyrights.)
 - Bhutanese communities lack media awareness. The government and media organisations must build media consciousness among communities and make them more active in determining their media needs by encouraging them to provide regular feedback.
 - UNESCO has been tapped mainly by the cultural sector in Bhutan. With its vast experience in the information sector, UNESCO should be involved in media building in Bhutan. The government must be better represented at UNESCO and other organisations dealing with media and ICT.
 - The government can analyse work routines to see how
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telecommuting can be introduced to Bhutan's advantage, allowing people, new mothers for example, to work from home if their jobs permit.

- The government needs to update rules so that Internet can be better used for purchases and research. For example, valid quotations from the Internet should be accepted.
- In some societies more people are now working from home because of Internet connections. Even towns like Phuentsholing and Thimphu can benefit in terms of office space and traffic congestion if people worked from home. In most parts of Bhutan, working from home could mean getting the best of two worlds.
- The government should help distribution of newspapers and other media by subsidising postal and other charges. Printed matters are subsidised in many countries by laws. Kuensel stopped sending the newspaper to Kathmandu because Druk Air charged Nu. 33,000 a year to carry 25 copies from Paro to Kathmandu.
- Information and communication through media are essential elements of the participatory governance system now being introduced. All government sectors should include and increase funding and financing for public service information and communications.

9.3.6 Boards and associations

- There is a need to provide clearer guidelines for the film and TV review board and other media related boards and associations. These boards also need to be professionalised with more trained members.
 - Private sector associations such as the Motion Picture Association and the Association for Private Cable Operators can be supported and provided guidelines to enable them to become more effective. The MPA has been useful in negotiating previews with the Film Board and in determining ticket and hall hire rates so far.
 - The management boards of public sector corporations should be more diversely represented. Rather than appear as government controlling bodies, they should include independent professionals and civil society.
 - Mechanisms must also be set up to address complaints against the media, while protecting the rights of journalists to report objectively. A media council has been mentioned as a neutral body to safeguard the interests of both media professionals and the newsmakers including the government.
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9.3.7 Policy/ Regulations

- The government must provide clear policy guidelines on converging technologies and in promoting the benefits of ICT and information as a right for all citizens. Looking at the immediate future, most viewers will be watching their TV mainly via cable, terrestrial and possibly even direct to home television delivered via satellite.
 - New technologies such as Direct To Home Broadcasting has already begun in India with the potential of reaching remote communities even in Bhutan. Apart from enhanced picture quality and more niche channels, DTH has the scope for interactive TV services such as movie-on-demand, Internet access, video conferencing and e-mail.
 - Direct to home (DTH) allows digital quality services with up to 200 channels across the region. Bhutan could explore DTH technology as a solution to reaching TV to dispersed, remote communities through community viewing centres, but the question of affordability has to be studied. It also has to be weighed against the likely social impacts of opening up the world to remote populations.
 - Transborder broadcasting is an issue to be addressed especially with the DTH technology that has been introduced in the region. The government needs to keep track of media development in neighbouring countries to see what impact it will have on Bhutan's media development. It also needs to frame appropriate policies to address issues like trans-border broadcasting, or global internet developments.
 - In many South Asian countries, concerns that the media will be misused have stalled and delayed the liberalisation of the media. But Bhutan also needs to look ahead to understand what kind of media development and liberalisation it wants now that the government is working towards providing information as a right for every Bhutanese citizen.
 - In an era of converging technologies, it is essential that the government and media organisations become active members of international organisations, particularly those dealing with information and communication issues, as they are becoming a central force in international relations and have an impact on the way international and regional media development impact on Bhutan.
 - The government, therefore, needs to be pro-active in legislation and look into emerging areas such as:
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- up-linking broadcast facilities from Bhutan
 - foreign investment or the extent of foreign investment in media
 - cross ownership of media - setting restrictions and guidelines.
- To improve the quality of cable TV and to ensure the professionalism of operators the government needs to have a clear cut policy for licensing cable operators. More is not necessarily the best. With 33 cable operators in the country, many of them do not enjoy economies of scale and are unable to provide professional service. The government could license Multiservice Operators who will establish central control stations and be responsible for laying trunk cable lines.
 - Regarding content, media is not just a business, and providers must accept responsibility for the content they provide. Regulations need to nurture the cable industry and make it viable so that it can contribute to diversity in programming. The government needs to create a hospitable environment for the small cable operator and make it sensitive to national interests. It needs to promote a partnership between the Association for Private Cable Operators and BBS.
 - Trade policies, that already encourage ICT ventures, must be more flexible to allow for imports of TV receiver sets and other equipment to compensate for Bhutan's lack of production capacity. The radio, for example, is not a luxury but a necessity in a landlocked country.
 - This flexibility of the government should also prioritise the media industry in terms of financial loans to encourage the setting up of production and media companies as well as media and ICT-related training centres to contribute to diversity in media.

9.3.8 Some specific recommendations for media organisations

Broadcast

- Radio enjoys the best penetration at the national, regional and local level. In Bhutan the full potential of radio has not yet been tapped. The introduction of television has further detracted from the development of radio because television is a far more exciting media for the newsmakers, the audience, and media professionals. The media must pay close attention to rural listeners and not be infatuated by TV because of influential viewers in Thimphu.
 - Radio can initiate educational and a variety of other services. With its ability to broadcast in more languages, BBS can be used creatively to disseminate information since it has an instant reach.
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- BBS can boost productions for both television and radio by outsourcing production to local companies. This will help expand local content, and build up a private audio-visual industry to everyone's benefit.
- The broadcast media needs to feature more debates, better quality discussion programmes, and provide quality opinion programmes. Today, even potentially powerful programmes like GOWA are not drawing an audience because of a lack of financing, professionalism, and objectivity.
- Television is already used to reach local communities through local announcements and even the screening of local sports matches or school debates. Cable operators can be neighbourhood broadcasters. They should follow the same programme policies as the national broadcaster in terms of social and cultural boundaries.
- Cable operators need clear rules and guidelines on content/channels, particularly for advertising and "programmes of local origination". Regulations must clearly state the responsibility of cable operators. Seeing developments today, and the tremendous impact of advertising, there is an urgent need to regulate advertising by private cable operators who are playing with few rules. APCO or the cable operators have to provide a viewing guide for all subscribers so that they are able to view TV selectively. This is particularly important for children's viewing.

Print

- Newspapers need to provide more in-depth and investigative reporting, and increase the frequency of publication. When providing international news, they must be relevant to Bhutan and attempts must be made to provide quality international analysis and commentary articles.
 - The government needs to facilitate private newspapers to provide a wider choice for the readers and also to encourage better standards among newspapers through competition.
 - Print media should be encouraged to translate printed material into Dzongkha whenever relevant.
 - All publications produced for public sale and distribution should be regulated with a printing regulation.
 - Government and private sector policies should encourage the creation of favourable conditions for indigenous publishing and increased exchange and sale. Examples include reducing postage fees for printed material, customs regulations conducive to exchange and sale of printed and technical material.
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Film/ music/ other entertainment

- The Bhutanese public have expressed a need and preference for entertainment, mainly in the form of films, followed by music concerts and dramas. All forms of creative media and entertainment must be encouraged. Private sector media and entertainment needs to be explored.
- Film and music must be encouraged as the development of the creative art form and to give Bhutanese culture more depth.

Develop local expertise

- The local talent base needs to be strengthened through training, employment opportunities, financial incentives like soft loans.
- The government needs to strengthen support for the production of media products e.g. the Dzongkha Development Authority's support for film and music can also extend to print and radio. Incentives should be made available to encourage Bhutanese to read and write and to promote the performing arts.

Internet

- There is a need to provide more content on local websites. All government websites that are slow in updates, should be regularly updated and be made more interactive, and more useful.
 - Training is required to educate webmasters, promote e-governance, e-literacy and all the other plans for ICT. A second ISP would help improve Druknet's services.
 - Ultimately, ICT requires a three-pronged strategy to succeed: commitment from the top, the capability to drive it; and a realistic masterplan (clear and simple). ICT empowers but it is the politicians and leaders who need to accept it and be involved. ICT does not dictate governance but works within the system and power hierarchies usually do not change.
 - This study has emphasised the need for general awareness as well as media and ICT literacy as a vital strategy to enable the media to play a healthy role in development. The Ministry of Information and Communications, as the central force in media and ICT development, must work with different government and private organisations to initiate and steer national growth in this field. This includes media and governance, media and development (education, health, etc), media and private sector development (business community) , media and civil society (public).
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CHAPTER 10

Conclusion

Bhutanese society is enjoying increasing access to the media but there are gaps between the haves and have-nots. Some people have a wide range of choice of media, especially with the introduction of TV and the Internet. Others, especially in rural areas, do not. But the people want more access to the media and it is important to provide this, particularly for youth and the rural population.

There is no doubt that there is substantial political, social, and economic impact of the media. While this impact is good and bad, it needs to be understood, monitored and analysed to enable the government to respond to the developments. The impact also needs to be understood in the context of national, regional and international developments.

Society is changed by a number of forces like political reformation, economic liberalisation, and social volatility. Globalisation, urbanisation, and increasing literacy are new influences on Bhutan. As Bhutanese society evolves this first study on the impact of the media provides an understanding of its role as Bhutan joins the global information society.

In the perspective of the impact of the international and national media on Bhutanese society, there is a critical need to generate more and better quality local content. There is the need for more professionalism among media professionals. This is the only way to gain credibility and to balance the “invasion” by the international media and good local content.

The government - through the right policies, regulations, legislation - and the media - through professionalism - must reinforce the national priorities and meet the aspirations of the people. To do this it is important to acknowledge that, in essence, it is the quality of people that matter and not the quality of equipment and facilities. “E” should not stand for “electronics”, but “empowerment”, “enabling”, “equity”.

It is critical to understand that the media and ICT are not goals in themselves, but means to an end. The information sector is a powerful force, and the media is an effective tool, to help achieve national goals. Ultimately, the success of media and ICT development will be assessed in the achievement of national goals like good governance, employment, and in controlling population, drugs, crime, HIV/AIDS, corruption, and the state of Gross National Happiness itself.

Case study 3: Views of a public servant

Personal profile: Male public servant in his mid 40s

Home: lives in a village outside Thimphu town. Works in Thimphu town.

Media Access: I have access to almost all the media available. As a resident of Thimphu, I have the advantage of working and living in a dzongkhag with a good supply of media, but I do not receive cable TV services.

TV: I installed an antenna to receive BBS TV, and am one of the few in my neighbourhood to get BBS TV. Some of my neighbours have homes on the shaded side of the mountain and are unable to receive any signals at all. We pleaded with the cable operators and even offered to double the subscription rates, but my neighbours and I have not been able to get the cable operator to link up our homes. The operators are just out to make quick profits and they don't want to take the cable line out to us despite our requests. They would have a good business if they laid a line to our neighbourhood.

I now have a direct-to-home service and I subscribe to a Star package for Nu.8,000/- a year and it provides me with all the channels I need."

Some homes in the neighbourhood have installed satellite dishes but their viewing is limited to the channels they receive.

Radio: I use a world space radio and receive "digital quality" reception to about 35 international channels which is a good alternative to local media. I listen to BBC, some American channels, and on rare occasions, BBS radio.

Internet/ newspaper: I read the Kuensel online and buy the weekly paper as well. I also access the Internet at work and at home.

Film and music: Although I know the plots of many local films, I have not watched a single Bhutanese film although I have easy access to Bhutanese films which are always premiered in Thimphu. The cinema and its "seedy environment" deters me and my friends from going there although I would like to watch some local films. I buy Bhutanese music tapes rarely, only when there are good tapes on the market.

Preference: The Internet is becoming indispensable. I check every couple of hours especially to keep up to date with sports news. This is the beauty of communication and the ease of it.

I am reading less since TV and the Internet was made available.

Local media is good for specific local information. BBS radio, for

example, is good for the audience and the requests shows are good. External media, however, gives better entertainment and a broader range of information.

Impact:

People in my neighbourhood who have satellite TV are glued to their TV. They are watching a lot of the Sahara channel and other Indian channels. You can hear the programmes and music coming from TV every time you go by their homes.

Kuenselonline is important and provides people's views on key issues. It is very interesting to read KOL and it provides some very good comments and feedback. Even if some people don't like it we have to live with it. It is an important forum.

Assessment of media: The news is basically government driven. Kuensel exercises a lot of independence and sometimes government officials get a little upset. BBS is still confined to factual news and does not really provide stimulating programming or news.

“Bhutanese film plots are weak and not original. Modern rigsar music is like “junk food”. It is mainly direct copies of Hindi music and lacks creativity, even in the melodies. The quality of the music tapes, although improving compared to four to five years ago, is still overpriced for the quality it provides.”

The new film and music market is purely driven by the desire to make money. Many of the people who make them have not yet understood the need to provide quality productions.

Role of media:

The media should stimulate public debate. But while doing so, it has to be careful that it does not ferment a kind of divisiveness among society. I feel that the majority of our people are not discerning enough to understand some of the political issues and especially sensitive issues. There are areas where misconception of communication takes place so we have to start slowly. The current state of development in our media is just the right pace.

Annexe 1: Interviews/ discussions:

1. Lyonpo Leki Dorji, Minister for Information and Communications
2. Lyonpo Jigme Thinley, Minister for Home Affairs
3. Lyonpo Ugen Tshering, Minister for Labour and Employment
4. Lyonpo Sonam Tobgay, Chief Justice, Royal Court of Justice
6. Dasho Tashi Phuntshog, Secretary, MOIC
7. Bhimlal Sharma, Planning Officer, MOIC
8. Sangay Tenzing, Managing Director, Bhutan Telecom
9. Jichen Thinley, Druknet
10. Thinley Dorji, Director, Bhutan Communications Authority
11. Phub Tshering, Exec. Engineer, Bhutan Communications Authority
12. Sangay Wangchuk, Acting Head, DoIT
13. Sonam Dukdag, Systems Analyst, DoIT
14. Mingbu Dukpa, Managing Director, BBS
15. Sonam Tobgay, Station Engineer, BBS
16. Kinley Dorji, MD, Kuensel Corporation
17. Phuntsho Wangdi, Editor, Kuensel
18. Dasho Sonam Wangchuk, Secretary, Special Commission
19. Pema Thinley, Secretary, Education Ministry
20. Dasho Meghraj Gurung, Managing Director, Bhutan Post
21. Mynak Trulku, Director , National Library of Bhutan
22. Thinley Gyamtsho, Principal, Royal Academy for Performing Arts
20. Kinga Singye, former Exec. Director, BBS
23. Sonam Tshong, former Exec. Director, BBS
24. Neten Zangmo, Foreign Secretary, RGoB
25. Pema Lhamo, Director, Information Communication Services, Agriculture Ministry
26. Tashi Norbu, Director, Tashi Nenchu music group

27. Samuel Lepcha, Melody Drayang
28. Kinley Dorje, Manager, Norling Productions and Member Secretary, Association of Private Cable Operators.
29. Neten Dorji, singer, sound engineer, BBS
30. Rinzi Dorji, Manager, Sigma Cables
31. Sonam Pelden, Trongsa Cable Operator
32. Mila Tobgay, Motion Picture Association
33. Fritz Maurer, farmer, Bumthang
34. Jigme Tenzin, Headmistress, Wangdicholing Primary School, Bumthang
35. Karma Wangchuk, District Education Officer, Thimphu Dzongkhag
36. Dzongsar Khyentse Rinpoche, film-maker/ Buddhist teacher
37. Ugen Wangdi, Ugetsu Communications
38. Karma Ura, Director, Centre for Bhutan Studies
39. D.K. Mukhia, Khalikhola chimi, lamazingkha dungkhag, Samchi
40. Gyem Tshering, Chimi of Lunana geog
41. Sangay, Chimi of Shingkar geog
42. Dechen Wangchuk, Chimi of Lauri & Serthi geogs
43. Tralek, Chimi of Dorokha, Mayona, Denchukha and Dumte geogs
44. Dorji Tshering, Chimi of Merak & Sakten geogs
45. Karma Pelden, Gangzur Chimi
46. Deki Pelzom, Tangmachu chimi
47. Chimi Dolma, Paro Naja Chimi
48. Ugen Dorji, Bumthang Chimi

Annexe 2: Focus group discussions – 20 groups:

Youth (recent graduates)	From all over Bhutan (2 groups)	August 2003
Youth (class 10/12 passed)	From all over Bhutan	August 2003
College students	Sherubtse College, Kanglung	Sept. 2003
Rural Youth/ dzongkhag dancers	Geylephug	Sept. 2003
Children	Schools in Bumthang, Trongsa, Chamgang, Thimphu	Sept/ Oct. 2003
Professionals	Thimphu , Mongar	August/ Sept 2003
Producers/reporters	Thimphu & regional correspondents	Sept. 2003
Film makers/ scriptwriters, producers/ musicians, singers etc.	Thimphu	Sept. 2003
Chimis	From all over Bhutan	August 2003
Chimis- women	From all over Bhutan	Sept. 2003
Elderly (55 – 74 years)	Trongsa	August 2003
Business community/ local leaders	Trashigang, Mongar, Dechencholing village	
Farmers/home makers/local leaders	Bumthang, Trongsa, Kanglung	August 2003
Teachers	Chamgang	September 2003
Teachers and students	Geylephug, Phuentsholing Thimphu	2000

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Section B: Survey Report

Media study 2003

Section B : Suvey Report

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superficial for the study. There was a sampling of chimis and special focus group discussions with selected chimis who represented a geographic, demographic, and gender cross section of the population.

Out of 1100 sample households, 118 were non-response. The table below shows the distribution of samples.

Sl. No.	Dzongkhag	Urban Towns		Rural Geogs		Total
		No. Sample blocks	No. of sample households	Sample Geogs	No. of sample households	
1	Thimphu	4	100	2	136	236
2	Trashigang	4	93	2	141	234
3	Bumthang	4	103	1	70	173
4	Sarpang/Geylegphug	4	90	1	134	224
5	Phuentsholing	4	101	-	-	101
6	Chimis	-	-	-	14	14
	Total	20	487	6	495	982

Questionnaire design:

The survey questionnaire was designed to draw an in-depth response from each respondent. Respondents were asked for their media viewing/listening/reading habits, their preferences and their expectations, and then their views and perceptions. Sections A-H, filled by the surveyors, covered a range of issues. They include:

- Demographics
- Access to media (infrastructure, availability, and affordability)
- Media preference
- Media impact, including on children
- Media affordability

It also covered all media through specific questions:

- Radio
- Television
- International TV
- Print
- Internet
- Music and Film
- General media

The draft questionnaire was reviewed by the consultants, the media task force, the Central Statistics Office (CSO), and the Ministry of Information and Communication. Their suggestions were incorporated. The draft questionnaire was pre-tested and finalised.

Limitations of the study

Since the questionnaire covered all the media, the survey - with 114 questions – was large. This meant that both the field work and data collection and processing was more tedious and time consuming.

Many of the subjects covered were new areas of study in Bhutan with very little existing data to work on. It also meant that respondents had to give more time.

There is a slight bias in the selection of areas for the survey in that most of the geogs covered are closer to the road. This was done deliberately because the survey seeks to measure impact on the premise that the most remote rural areas have very little access or exposure to media, particularly Internet, TV, film. This shortcoming was overcome with focus group discussions and in-depth interviews with people from remote areas (including chimis) for the main study findings (See section A: Media Impact Study) and contact by telephone.

Chapter 4: Survey results and findings

A total of 982 households were enumerated in the survey after subtracting the non-response households and the households from one of the geogs in Gelephu which could not be enumerated for security reasons.

Of the total respondents, 465 respondents were male and 517 were female.

A. Demographics

Note: RF = respondents frequency

Tables 1,2

More than a third of the respondents, 33.2% (326) were between the ages of 30-40, while youth between 15 to 24 years of age represent 12.93% of the sample.

The proportion of urban to rural households is almost even at 49.59% (495):50.4% (487). This figures includes the chimis who are all from rural areas.

Table 1.1 Distribution of respondents, by age, sex and Rural/Urban, Bumthang

Age group	Total						Rural						Urban					
	Total			Male			Female			Total			Male			Total		
	No.		%	No.		%	No.		%	No.		%	No.		%	No.		%
	No.	%	No.	%	No.	%	No.	%	No.	No.	%	No.	No.	%	No.	No.	%	No.
<15	3	1.73%	1	2.13%	2	1.59%	2	2.86%	1	5.56%	1	1.92%	1	0.97%	0	0.00%	1	1.35%
15-24	27	15.61%	3	6.38%	24	19.05%	6	8.57%	0	0.00%	6	11.54%	21	20.39%	3	10.34%	18	24.32%
25-29	22	12.72%	5	10.64%	17	13.49%	6	8.57%	0	0.00%	6	11.54%	16	15.53%	5	17.24%	11	14.86%
30-39	70	40.46%	19	40.43%	51	40.48%	21	30.00%	2	11.11%	19	36.54%	49	47.57%	17	58.62%	32	43.24%
40-50	23	13.29%	7	14.89%	16	12.70%	13	18.57%	6	33.33%	7	13.46%	10	9.71%	1	3.45%	9	12.16%
51 and above	28	16.18%	12	25.53%	16	12.70%	22	31.43%	9	50.00%	13	25.00%	6	5.83%	3	10.34%	3	4.05%
Total	173	100.00%	47	100.00%	126	100.00%	70	100.00%	18	100.00%	52	100.00%	103	100.00%	29	100.00%	74	100.00%

Table 1.2 Distribution of respondents, by age, sex and Rural/Urban, Sarpang

Age group	Total						Rural						Urban					
	Total			Male			Female			Total			Male			Total		
	No.		%	No.		%	No.		%	No.		%	No.		%	No.		%
	No.	%	No.	%	No.	%	No.	%	No.	No.	%	No.	No.	%	No.	No.	%	No.
<15	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
15-24	29	12.95%	8	5.97%	21	23.33%	11	8.21%	6	6.45%	5	12.20%	18	20.00%	2	4.88%	16	32.65%
25-34	29	12.95%	15	11.19%	14	15.56%	14	10.45%	7	7.53%	7	17.07%	15	16.67%	8	19.51%	7	14.29%
35-44	63	28.13%	35	26.12%	28	31.11%	32	23.88%	18	19.35%	14	34.15%	31	34.44%	17	41.46%	14	28.57%
45-54	46	20.54%	29	21.64%	17	18.89%	23	17.16%	16	17.20%	7	17.07%	23	25.56%	13	31.71%	10	20.41%
55-64	57	25.45%	47	35.07%	10	11.11%	54	40.30%	46	49.46%	8	19.51%	3	3.33%	1	2.44%	2	4.08%
Total	224	100.00%	134	100.00%	90	100.00%	134	100.00%	93	100.00%	41	100.00%	90	100.00%	41	100.00%	49	100.00%

Table 1.5 Distribution of respondents, by age, sex and Rural/Urban, Trashigang

Age group	Total						Rural						Urban					
	Total			Male			Female			Total			Male			Female		
	No.	%		No.	%		No.	%		No.	%		No.	%		No.	%	
<15	2	0.85%	0	0.00%	2	1.47%	1	0.70%	0	0.00%	1	1.25%	1	1.09%	0	0.00%	1	1.79%
15-24	39	16.67%	10	10.20%	29	21.32%	22	15.49%	7	11.29%	15	18.75%	17	18.48%	3	8.33%	14	25.00%
25-29	35	14.96%	12	12.24%	23	16.91%	17	11.97%	6	9.68%	11	13.75%	18	19.57%	6	16.67%	12	21.43%
30-39	73	31.20%	27	27.55%	46	33.82%	41	28.87%	15	24.19%	26	32.50%	32	34.78%	12	33.33%	20	35.71%
40-50	44	18.80%	25	25.51%	19	13.97%	25	17.61%	14	22.58%	11	13.75%	19	20.65%	11	30.56%	8	14.29%
51 and above	41	17.52%	24	24.49%	17	12.50%	36	25.35%	20	32.26%	16	20.00%	5	5.43%	4	11.11%	1	1.79%
Total	234	100.00%	98	100.00%	136	100.00%	142	100.00%	62	100.00%	80	100.00%	92	100.00%	36	100.00%	56	100.00%

Table 1.6 Distribution of respondents

Age group	Chimis					
	Total		Male		Female	
	No.	%	No.	%	No.	%
<15	0	0.00%	0	0.00%	0	0.00%
15-24	0	0.00%	0	0.00%	0	0.00%
25-29	4	28.57%	1	12.50%	3	50.00%
30-39	6	42.86%	3	37.50%	3	50.00%
40-50	3	21.43%	3	37.50%	0	0.00%
51 and above	1	7.14%	1	12.50%	0	0.00%
Total	14	100.00%	8	100.00%	6	100.00%

Table 2. Respondents by occupation and level of education

Level of Education	Total		Occupation										
	No.	%	Business	Civil Service	Professional	Retired	Student	Farmer	Monk	Family responsibility	Trainee	Un-employed	Others
Primary	153	15.58%	30	34	1	5	5	33	1	29	1	4	10
High School	174	17.72%	40	73	1	5	22	7	0	10	4	4	8
Tertiary	34	3.46%	4	18	3	2	0	1	0	1	1	1	3
Religious	72	7.33%	4	4	1	6	0	37	10	1	0	1	8
Vocational	26	2.65%	2	11	0	2	1	6	0	2	0	0	2
None	505	51.43%	39	7	3	7	0	277	0	104	0	53	15
Others	18	1.83%	5	2	0	0	0	4	0	1	0	3	3
Total	982	100.00%	124	149	9	27	28	365	11	148	6	66	49

Table 2.3 Ownership of media equipment by Rural/Urban

Media equipment	Total		Rural		Urban	
	No.	%	No.	%	No.	%
Computer	23	1%	4	1%	19	2%
Radio	756	40%	405	53%	351	31%
TV	479	25%	121	16%	358	31%
VCR/VCD/DVD	169	9%	36	5%	133	12%
Stereo set	440	23%	177	23%	263	23%
Others	39	2%	25	3%	14	1%
Total	1906	100%	768	100%	1138	100%

Note: More than 1 choice

B. BBS Radio

Bhutan has been receiving international radio broadcasts even before the establishment of the Bhutan Broadcasting Service. But it is BBS that has quickly become the main broadcaster and the most popular radio service in the country.

Section B looks specifically at BBS radio and international radio listening habits, preferences, and tries to gauge the impact of radio in general on Bhutanese society.

Table B1. The survey confirms that rural households tend to listen to BBS radio every day (51.8%/411RF) while 18.6% (182) of urban households never listen to BBS radio.

Table B2. Evenings are the most popular time to listen to BBS radio, 16.8% (134) followed by mornings, 10.3% (82).

Table B3. Reasons for listening to BBS radio vary. The majority or almost half the respondents, 49.81% (395), tune in to BBS radio for news and current affairs, 25.22% (200) to learn or for education, and 11.85% (94) for music.

Table B4. The most popular BBS radio programmes are agriculture programmes, 22.7% (180), local news and current affairs, 13.87% (110), music, 12.73% (101) and health, 7.44% (59).

In terms of rural/urban preferences, rural listeners like agriculture, zakar and music in that order. Urban listeners like music programmes best followed by government news and information and agriculture. Least interesting programmes for rural listeners comprise sports,

Table B1: BBS radio listening by Dzongkhag/Town

Dzongkhag/Town	Total		Frequency		
	No.	%	Everyday	A few times a week	Never
Bumthang	147	18.54%	76	71	21
Gelephu	173	21.82%	86	87	39
Thimphu	211	26.61%	136	75	34
Trashigang	188	23.71%	75	113	55
Phuentsholing	60	7.57%	25	35	49
Chimis	14	1.77%	13	1	0
Total	793	100.00%	411	382	198
Rural	448	56.49%	248	100	50
Urban	345	43.51%	163	182	148

Table B2: BBS radio listening time by Dzongkhag/Town

Dzongkhag/Town	Total	Time			
		Morning	Afternoon	Evening	Night
Bumthang	147	14	4	24	2
Gelephu	173	4	1	42	1
Thimphu	211	33	5	33	5
Trashigang	188	10	2	20	0
Phuentsholing	60	11	3	12	3
Chimis	14	10	0	3	0
Total	793	82	15	134	11
Rural	448	38	4	72	7
Urban	345	44	11	59	4

Table B4: Preference for BBS radio Programmes by Rural/Urban

Programme	Total				Rural				Urban			
	Most int.		Least int.		Most int.		Least int.		Most int.		Least int.	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1. Agriculture	180	22.70%	18	2.27%	146	31.60%	8	1.76%	34	10.27%	10	2.96%
2. Announcements	28	3.53%	1	0.13%	14	3.03%	0	0.00%	14	4.23%	1	0.30%
3. Business	18	2.27%	19	2.40%	8	1.73%	13	2.86%	10	3.02%	6	1.78%
4. Children's programmes	3	0.38%	9	1.13%	0	0.00%	3	0.66%	3	0.91%	6	1.78%
5. Drama/short stories	10	1.26%	20	2.52%	5	1.08%	3	0.66%	5	1.51%	17	5.03%
6. DYT/GYT meetings	4	0.50%	5	0.63%	2	0.43%	2	0.44%	2	0.60%	3	0.89%
7. Education programmes	12	1.51%	4	0.50%	4	0.87%	3	0.66%	8	2.42%	1	0.30%
8. Government news & information	81	10.21%	4	0.50%	41	8.87%	2	0.44%	40	12.08%	2	0.59%
9. Gowa	11	1.39%	80	10.09%	3	0.65%	39	8.57%	8	2.42%	41	12.13%
10. Health	59	7.44%	5	0.63%	41	8.87%	4	0.88%	18	5.44%	1	0.30%
11. International news	27	3.40%	21	2.65%	14	3.03%	18	3.96%	13	3.93%	3	0.89%
12. Local news/Current Affairs	110	13.87%	1	0.13%	37	8.01%	1	0.22%	73	22.05%	0	0.00%
13. Lozey/tshangmo	17	2.14%	26	3.28%	8	1.73%	8	1.76%	9	2.72%	18	5.33%
14. Music	101	12.74%	21	2.65%	48	10.39%	11	2.42%	53	16.01%	10	2.96%
15. Public information	2	0.25%	4	0.50%	1	0.22%	4	0.88%	1	0.30%	0	0.00%
16. Quiz competitions	3	0.38%	14	1.77%	0	0.00%	8	1.76%	3	0.91%	6	1.78%
17. Religious programmes	31	3.91%	0	0.00%	20	4.33%	0	0.00%	11	3.32%	0	0.00%
18. Road conditions/Traffic	0	0.00%	8	1.01%	0	0.00%	4	0.88%	0	0.00%	4	1.18%
19. Sports	1	0.13%	77	9.71%	1	0.22%	56	12.31%	0	0.00%	21	6.21%
20. Weather	2	0.25%	15	1.89%	1	0.22%	5	1.10%	1	0.30%	10	2.96%
21. Women's programmes	3	0.38%	9	1.13%	3	0.65%	3	0.66%	0	0.00%	6	1.78%
22. Zakar	60	7.57%	6	0.76%	51	11.04%	3	0.66%	9	2.72%	3	0.89%
23. Don't know	28	3.53%	388	48.93%	14	3.03%	233	51.21%	14	4.23%	155	45.86%
24. Others	2	0.25%	38	4.79%	0	0.00%	24	5.27%	2	0.60%	14	4.14%
Total	793	100.00%	793	100.00%	462	100.00%	455	100.00%	331	100.00%	338	100.00%

Table B6: Subjects/Topics learnt from BBS Radio by Rural/Urban

Subjects/Topics	Total		Rural		Urban	
	No.	%	No.	%	No.	%
1. Agriculture	259	32.66%	214	46.72%	45	29.80%
2. Education	83	10.47%	37	8.08%	46	30.46%
3. Health	111	14.00%	72	15.72%	39	25.83%
4. Music/Songs	94	11.85%	35	7.64%	59	39.07%
5. News & Information	228	28.75%	93	20.31%	135	89.40%
6. Others	18	2.27%	7	1.53%	11	7.28%
Total	793	100.00%	458	100.00%	335	221.85%

Table B7: BBS radio advertising and its impact by Rural/Urban

	Total		Rural		Urban	
	No	%	No.	%	No.	%
Listen to Advertising						
Yes	383	48.30%	209	45.63%	174	51.94%
No	410	51.70%	249	54.37%	161	48.06%
Total	793	100.00%	458	100.00%	335	100.00%
Buy/use or want to buy/use products and services advertised						
Yes	139	36.29%	71	33.97%	68	39.08%
No	244	63.71%	138	66.03%	106	60.92%
Total	383	100.00%	209	100.00%	174	100.00%

Table B8: Listening to International Radio Stations by Rural/Urban/Dzongkhag/Town

Radio Stations	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
BBC	95	28.27%	40	26.85%	55	29.41%	18	31.58%	16	26.23%	10	22.22%	33	34.02%	10	16.13%	8	57.14%
AIR	58	17.26%	34	22.82%	24	12.83%	2	3.51%	16	26.23%	8	17.78%	22	22.68%	7	11.29%	3	21.43%
Radio Australia	2	0.60%	2	1.34%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	2	14.29%
Radio Nepal	30	8.93%	16	10.74%	14	7.49%	11	19.30%	11	18.03%	2	4.44%	2	2.06%	4	6.45%	0	0.00%
Radio Tibet	16	4.76%	10	6.71%	6	3.21%	1	1.75%	2	3.28%	2	4.44%	11	11.34%	0	0.00%	0	0.00%
VOA	4	1.19%	0	0.00%	4	2.14%	0	0.00%	0	0.00%	4	8.89%	0	0.00%	0	0.00%	0	0.00%
Others	17	5.06%	11	7.38%	6	3.21%	8	14.04%	1	1.64%	4	8.89%	1	1.03%	2	3.23%	1	7.14%
Never	114	33.93%	36	24.16%	78	41.71%	17	29.82%	15	24.59%	15	33.33%	28	28.87%	39	62.90%	0	0.00%
Total	336	100.00%	149	100.00%	187	100.00%	57	100.00%	61	100.00%	45	100.00%	97	100.00%	62	100.00%	14	100.00%

Table B11: Place of listening to radio by Rural/Urban

Place	Total		Rural		Urban	
	No	%	No.	%	No.	%
At home	706	89.03%	403	87.99%	303	90.45%
In the Car	7	0.88%	1	0.22%	6	1.79%
At work	14	1.77%	8	1.75%	6	1.79%
Others	66	8.32%	46	10.04%	20	5.97%
Total	793	100.00%	458	100.00%	335	100.00%

Table B12: People's perception of radio impact on Bhutan by Rural/Urban/Dzongkhag/Town

Impact	Total		Rural		Urban		Bumthang		Gelephu		P/ling		Thimphu		Trashigang	
	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Bad	8	1.01%	4	0.87%	4	1.19%	1	0.64%	0	0.00%	3	4.84%	4	1.91%	0	0.00%
Good	716	90.29%	419	91.48%	297	88.66%	140	89.74%	167	94.89%	50	80.65%	195	93.30%	162	92.05%
No impact	16	2.02%	6	1.31%	10	2.99%	2	1.28%	4	2.27%	3	4.84%	5	2.39%	1	0.57%
Don't know	53	6.68%	29	6.33%	24	7.16%	13	8.33%	5	2.84%	6	9.68%	5	2.39%	13	7.39%
Total	793	100.00%	458	100.00%	335	100.00%	156	100.00%	176	100.00%	62	100.00%	209	100.00%	176	100.00%

Table C7: When BBS TV is compared to other TV channels, we see the same trends in rating. More than half, 57.66% (256) of the respondents gave BBS TV an average rating, and a quarter, 25.23% (112) rated it good. This once again affirms the global trend which shows that for TV viewers everywhere, local content is always more attractive than international content.

Table C8: Households were asked if they were willing to pay for BBS TV if they wanted more programmes and improved access. This question was included because many people complained about the poor reach of BBS TV (still restricted to Thimphu with delayed broadcasts in some districts) and limited local programming.

69.98% (310) said they were willing to pay for BBS TV and 30.02% said they were not. Most of those who were willing to contribute to the costs were urban residents, 316 urban: 127 rural.

Of those who said they were willing, 41.46% (136) said they would pay as much as the current cable TV fees, 34.35% (113) less than cable TV fees, and only 9.45% (31) more than current cable TV fees. 63% (48) indicated other amounts.

Many of the respondents qualified their willingness by saying that if BBS TV provided improved programming in terms of timing, and quality of programmes, then they would be willing to pay some fees if they want the service. Some said they would not if the quality and timing of programmes remained the same.

Table C1: Who have access to Television by Rural/Urban/Dzongkhag/Town

Dzongkhags	Total		Yes		No	
	No.	%	No.	%	No.	%
Bumthang	168	17.28%	90	16.04%	78	18.98%
Gelephu	210	21.60%	93	16.58%	117	28.47%
Phuentsholing	99	10.19%	95	16.93%	4	0.97%
Thimphu	243	25.00%	160	28.52%	83	20.19%
Trashigang	238	24.49%	113	20.14%	125	30.41%
Chimis	14	1.44%	10	1.78%	4	0.97%
Total	972	100.00%	561	100.00%	411	100.00%
Rural	482	49.59%	161	28.70%	321	78.10%
Urban	490	50.41%	400	71.30%	90	21.90%

Table C3: Preference for BBS TV programmes by Rural/Urban (Most/least interesting)

Programme	Total						Rural						Urban					
	Most int.			Least int.			Most int.			Least int.			Most int.			Least int.		
	No.	%	No.	No.	%	No.	No.	%	No.	No.	%	No.	No.	%	No.	No.	%	No.
1. Agriculture	53	11.94%	7	1.90%	33	25.78%	3	1.72%	20	6.33%	4	1.50%						
2. Announcements	49	11.04%	0	0.00%	11	8.59%	0	0.00%	38	12.03%	0	0.00%						
3. Business	23	5.18%	4	1.08%	5	3.91%	2	1.15%	18	5.70%	2	0.75%						
4. Children's programmes	14	3.15%	3	0.81%	6	4.69%	1	0.57%	8	2.53%	2	0.75%						
5. Drama/short stories	13	2.93%	4	1.08%	1	0.78%	2	1.15%	12	3.80%	2	0.75%						
6. DYT/GYT meetings	5	1.13%	2	0.54%	1	0.78%	1	0.57%	4	1.27%	1	0.37%						
7. Education programmes	15	3.38%	1	0.27%	6	4.69%	0	0.00%	9	2.85%	1	0.37%						
8. Government news & information	24	5.41%	0	0.00%	4	3.13%	0	0.00%	20	6.33%	0	0.00%						
9. Gowa	9	2.03%	36	9.76%	1	0.78%	16	9.20%	8	2.53%	20	7.49%						
10. Health	13	2.93%	6	1.63%	4	3.13%	2	1.15%	9	2.85%	4	1.50%						
11. International news	14	3.15%	9	2.44%	3	2.34%	7	4.02%	11	3.48%	2	0.75%						
12. Local news/Current Affairs	68	15.32%	3	0.81%	12	9.38%	1	0.57%	56	17.72%	2	0.75%						
13. Lozey/tshangmo	22	4.95%	8	2.17%	7	5.47%	4	2.30%	15	4.75%	4	1.50%						
14. Music	49	11.04%	6	1.63%	7	5.47%	2	1.15%	42	13.29%	4	1.50%						
15. Public information	13	2.93%	3	0.81%	2	1.56%	2	1.15%	11	3.48%	1	0.37%						
16. Quiz competitions	3	0.68%	5	1.36%	1	0.78%	3	1.72%	2	0.63%	2	0.75%						
17. Religious programmes	12	2.70%	1	0.27%	4	3.13%	1	0.57%	8	2.53%	0	0.00%						
18. Road conditions/Traffic	1	0.23%	3	0.81%	0	0.00%	0	0.00%	1	0.32%	3	1.12%						
19. Sports	5	1.13%	16	4.34%	0	0.00%	13	7.47%	5	1.58%	3	1.12%						
20. Weather	2	0.45%	4	1.08%	0	0.00%	2	1.15%	2	0.63%	2	0.75%						
21. Women's programmes	3	0.68%	0	0.00%	2	1.56%	0	0.00%	1	0.32%	0	0.00%						
22. Zakar	7	1.58%	4	1.08%	5	3.91%	2	1.15%	2	0.63%	2	0.75%						
23. Don't know	17	3.83%	254	68.83%	9	7.03%	82	47.13%	8	2.53%	172	64.42%						
24. Others	10	2.25%	62	16.80%	4	3.13%	28	16.09%	6	1.90%	34	12.73%						
Total	444	100.00%	369	100.00%	128	100.00%	174	100.00%	316	100.00%	267	100.00%						

Table C5: BBS TV advertising and its impact by Rural/Urban									
	Total		Rural		Urban				
	No.	%	No.	%	No.	%			
Watch advertising on BBS TV									
Yes	252	57.40%	72	55.81%	180	58.06%			
No	187	42.60%	57	44.19%	130	41.94%			
Total	439	100.00%	129	100.00%	310	100.00%			
Buy/use or want to buy/use products and services advertised									
Yes	130	51.59%	37	51.39%	93	51.67%			
No	122	48.41%	35	48.61%	87	48.33%			
Total	252	100.00%	72	100.00%	180	100.00%			

Table C6: Rating of BBS Television programmes by Dzongkhag/Town

Rating	Total		Bumthang		Gelephu		Thimphu		Trashigang		Phuentsholing		Chimis	
	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Poor	31	6.98%	6	7.06%	8	11.27%	12	7.79%	1	2.56%	4	4.71%	0	0.00%
Satisfactory	235	52.93%	42	49.41%	46	64.79%	81	52.60%	13	33.33%	47	55.29%	6	60.00%
Good	156	35.14%	33	38.82%	17	23.94%	59	38.31%	25	64.10%	19	22.35%	3	30.00%
Don't know	22	4.95%	4	4.71%	0	0.00%	2	1.30%	0	0.00%	15	17.65%	1	10.00%
Total	444	100.00%	85	100.00%	71	100.00%	154	100.00%	39	100.00%	85	100.00%	10	100.00%

D. International TV

This sections focuses on satellite/cable TV and its impact on society. It provides findings on people's attitudes towards TV, advertisements, their perceptions of TV impact and their TV viewing habits.

Table D1: Of the households which watch television, 85.46% or 482 homes have cable TV connections. 14.53% or 82 homes are without cable television. The majority of those with cable connections are in urban towns.

Table D2/D3: Findings from Table D2 and D3 confirm that the most popular channels are mainly entertainment channels beamed out of India. The three favourite channels are the Star channels (Star Plus etc.), Zee, Zee Cinema, and Smax mainly for films, and Sony which are widely popular for its Hindi serials. It is interesting to note that BBC is the fourth most popular channel watched by 10.32% (145) and selected as a favourite among 15.5% (73) respondents. BBC has a largely urban viewership, 15.8% (58). English language films through the HBO and Star world movies channels rank fifth overall (D3) and is again more popular with urban viewers, 8.7% (32).

Apart from English film channels, other channels with a dominantly urban following include sports channels, national geographic, cartoon network, CNN and AXN.

Table D4: While viewers watch BBS TV mainly for news and information, the majority, 63.69% (307) watch cable TV for entertainment. 15.98% (77) for news and information, and 15.15% (73) respondents said they watched cable for educational reasons.

**Table D1: Households with Cable or Satellite TV connections
by Dzongkhag/Town and Rural/Urban**

Dzongkhag/Town	Total		With TV connections		No TV connections	
	No.	%	No.	%	No.	%
Bumthang	90	15.96%	84	17.43%	6	7.32%
Gelephu	95	16.84%	75	15.56%	20	24.39%
Thimphu	162	28.72%	119	24.69%	43	52.44%
Trashigang	110	19.50%	99	20.54%	11	13.41%
Phuentsholing	97	17.20%	96	19.92%	1	1.22%
Chimis	10	1.77%	9	1.87%	1	1.22%
Total	564	100.00%	482	100.00%	82	100.00%
Rural	162	28.72%	111	23.03%	51	62.20%
Urban	402	71.28%	371	76.97%	31	37.80%

Table D3: Household's favourite channel by Rural/Urban

TV Channels	Total		Rural		Urban	
	No	%	No.	%	No.	%
AXN	19	3.94%	3	2.61%	16	4.36%
BBC	73	15.15%	15	13.04%	58	15.80%
CNN	8	1.66%	4	3.48%	4	1.09%
Cartoon Network	25	5.19%	7	6.09%	18	4.90%
CCTV/Arirang/NHK	2	0.41%	1	0.87%	1	0.27%
Deutsche Welle etc.	0	0.00%	0	0.00%	0	0.00%
Discovery Kids, Animal Planet	10	2.07%	2	1.74%	8	2.18%
Fashion TV	0	0.00%	0	0.00%	0	0.00%
Indian news & CA prog.	15	3.11%	5	4.35%	10	2.72%
Zee, Smax, Zee Cinema, etc	83	17.22%	26	22.61%	57	15.53%
HBO, Star world movies	33	6.85%	1	0.87%	32	8.72%
Music (MTV B4U)	12	2.49%	5	4.35%	7	1.91%
National Geography	21	4.36%	5	4.35%	16	4.36%
Other entertainment	4	0.83%	2	1.74%	2	0.54%
Sony (serials)	79	16.39%	17	14.78%	62	16.89%
Sports	5	1.04%	1	0.87%	4	1.09%
Starplus, Star news	87	18.05%	19	16.52%	68	18.53%
World Wrestling	5	1.04%	1	0.87%	4	1.09%
Others	1	0.21%	1	0.87%	0	0.00%
Total	482	100.00%	115	100.00%	367	100.00%

These responses depend on the viewing habits of families, some of whom like to chat and discuss the programmes, while others like to watch programmes alone, without their children.

D1.4/ D1.5: The next two tables reflect people's attitudes towards violence and promiscuous scenes on TV.

Violence does not seem to be an issue with many viewers, 37.08% (208) feel there is not too much violence on TV, 29.42% (165) feel there is too much violence on TV, and 33.51% (188) feel there is excessive violence only sometimes.

People were asked if they had reservations about kissing and promiscuous scenes on TV. 55.61% (312) say they mind, 36.36% (204) say they do not, and 8.02% (45) say they don't know. Some of the adults pointed out that it was embarrassing to watch scantily clad women (which are common on Fashion TV, for example) when they are watching TV with younger people.

Many others also say they find it embarrassing to watch love scenes with their family members.

Considering that TV is geared towards a more general viewing public, programmes often conform to more general rating. Video/VCD/DVD films are, in fact, often more violent and explicit.

Table D1.6: The reactions to TV is generally positive. A majority of people, 66.49% (373) feel that TV has a good impact on Bhutanese society. It is interesting to note that this is an overwhelming view as the number of people who responded negatively represent, only 9.01% (49) of the sample. 7.31% (41) do not believe TV has an impact on society, 17.47% (98) do not know.

Table D1.7: Advertisements on Satellite TV seem to attract viewers as 65.72% or 372 respondents said they like the adverts on satellite/cable TV compared to 34.28% (194) who did not like the ads.

Table D1.8: Of the 561 respondents who watched satellite/ cable TV, 12.83% (72) watched less than one hour a day, 49.73% (279) watched between 1-3 hours a day and 37.43% (210) watched more than 3 hours a day. Urban residents made up 71.3% (400) of those who watched cable/satellite TV.

Table D1.3: Impact of TV on daily routine by Dzongkhag/Town

Impact	Total		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Less time for work	362	64.53%	49	54.44%	64	68.82%	60	63.16%	102	63.75%	85	75.22%	2	20.00%
Less time to socialise	40	7.13%	5	5.56%	9	9.68%	6	6.32%	15	9.38%	3	2.65%	2	20.00%
More time to socialise	54	9.63%	17	18.89%	5	5.38%	5	5.26%	11	6.88%	16	14.16%	0	0.00%
Less time for home/family	42	7.49%	5	5.56%	3	3.23%	11	11.58%	15	9.38%	4	3.54%	4	40.00%
More time at home/family	45	8.02%	9	10.00%	8	8.60%	10	10.53%	11	6.88%	5	4.42%	2	20.00%
Others	18	3.21%	5	5.56%	4	4.30%	3	3.16%	6	3.75%	0	0.00%	0	0.00%
Total	561	100.00%	90	100.00%	93	100.00%	95	100.00%	160	100.00%	113	100.00%	10	100.00%

Table D1.6: People's perception of TV Impact on Bhutanese Society by Dzongkhag/Town

TV impact on society	Total		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Negative	49	8.73%	7	7.78%	8	8.60%	9	9.47%	5	3.13%	20	17.70%	0	0.00%
Positive	373	66.49%	50	55.56%	57	61.29%	75	78.95%	118	73.75%	69	61.06%	4	40.00%
No impact	41	7.31%	8	8.89%	12	12.90%	3	3.16%	8	5.00%	4	3.54%	6	60.00%
Don't know	98	17.47%	25	27.78%	16	17.20%	8	8.42%	29	18.13%	20	17.70%	0	0.00%
Total	561	100.00%	90	100.00%	93	100.00%	95	100.00%	160	100.00%	113	100.00%	10	100.00%

Table D1.7: Whether they like advertisements on Satellite/CableTV by Dzongkhag/Town

Liking	Total		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Like	369	65.78%	66	73.33%	50	53.76%	61	64.21%	98	61.25%	91	80.53%	3	30.00%
Dislike	192	34.22%	24	26.67%	43	46.24%	34	35.79%	62	38.75%	22	19.47%	7	70.00%
Total	561	100.00%	90	100.00%	93	100.00%	95	100.00%	160	100.00%	113	100.00%	10	100.00%

Children and Television

The next few tables show how parents and guardians view the impact of TV on children. The survey defined children as anyone under 12 years of age.

Table D1.9: Restrictions on children watching TV by Dzongkhag/Town

Parents and guardians show a relatively relaxed approach to children's TV viewing habits. More than half, 55.79% or 313 respondents said they did not restrict their children's TV viewing compared to 44.21% (248) respondents who said they did.

Table D1.10: Reasons for letting children watch TV by Dzongkhag/Town

Half the respondents, 50.09% (281) said they let children watch TV to learn, and 40.29% (226) to entertain them. 7.84% (44) said they let their children watch TV to keep them occupied.

Table D1.1 1: People's perception of impact of TV on children/young people by Dzongkhag/Town

This table explains people's perception of the impact of TV on children and young people. The most common reply, 33.22% (389) is that TV has affected the younger generation's school work. Many of the respondents explain that it has given them less time for homework. On the other hand, 15.8% (185) of the respondents thought TV has given the young more exposure and confidence, and 12.89% (81) said it made their children better informed about the world.

So while TV may have affected the time spent on academic study at home, people believe it has broadened the minds of our youth and improved their knowledge of the world. The table also shows that on the negative side, our children and youth now have less time to spend on outdoor activities such as sports, 8.6%(101), and spend less time reading, 8.9%(104).

Culture and Values

The next two tables focus on the impact of TV on culture and values.

Table D1.12: There is an overwhelming consensus regarding the common culture that comes across from TV. The majority, 73.26% or 411 respondents feel that Indian culture is most dominant followed by a far smaller number, 9.66% who sees western culture as being most common on TV. The second and third most other common cultures perceived on TV are western culture, 10.16% (57), world/global culture, 9.09% (51).

Table D1.13: Bhutanese TV viewers generally believe that the TV programmes reflect the values of rich, 44.21% (248), urban people, 24.6% (138) .

These two tables confirm the viewing habit of most people in Bhutan whose favourite channels are the Star, Zee and Sony packages broadcasting from India. It also supports the popularity of Indian films and TV serials (see Table D3 – Households' favourite channels) which reflects the lives of middle class society.

Table D1.9: Restrictions on children watching TV by Dzongkhag/Town

	Total		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Without restrictions	313	55.79%	54	60.00%	53	56.99%	57	60.00%	81	50.63%	62	54.87%	6	60.00%
With restrictions	248	44.21%	36	40.00%	40	43.01%	38	40.00%	79	49.38%	51	45.13%	4	40.00%
Total	561	100.00%	90	100.00%	93	100.00%	95	100.00%	160	100.00%	113	100.00%	10	100.00%

Table D1.10: Reasons for letting children watch TV by Dzongkhag/Town

Reasons	Total		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
To learn	281	50.09%	36	40.00%	62	66.67%	48	50.53%	88	55.00%	40	35.40%	7	70.00%
To entertain	226	40.29%	43	47.78%	30	32.26%	38	40.00%	54	33.75%	60	53.10%	1	10.00%
To keep them occupied	44	7.84%	8	8.89%	1	1.08%	9	9.47%	14	8.75%	11	9.73%	0	0.00%
Others	10	1.78%	3	3.33%	0	0.00%	0	0.00%	4	2.50%	2	1.77%	2	20.00%
Total	561	100.00%	90	100.00%	93	100.00%	95	100.00%	160	100.00%	113	100.00%	10	100.00%

Table D1.12: People's perception of common culture on TV by Dzongkhag/Town

Culture	Total		Dzongkhags										Chimis	
			Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang			
	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Indian culture	411	73.26%	70	77.78%	74	79.57%	62	65.26%	103	64.38%	99	87.61%	3	30.00%
	57	10.16%	5	5.56%	9	9.68%	15	15.79%	18	11.25%	8	7.08%	2	20.00%
World/Global culture	51	9.09%	4	4.44%	6	6.45%	13	13.68%	21	13.13%	3	2.65%	4	40.00%
Youth culture	27	4.81%	6	6.67%	4	4.30%	3	3.16%	11	6.88%	2	1.77%	1	10.00%
Consumer culture	6	1.07%	2	2.22%	0	0.00%	0	0.00%	4	2.50%	0	0.00%	0	0.00%
Others	9	1.60%	3	3.33%	0	0.00%	2	2.11%	3	1.88%	1	0.88%	0	0.00%
Total	561	100.00%	90	100.00%	93	100.00%	95	100.00%	160	100.00%	113	100.00%	10	100.00%

Table D1.13: People's perception of common values on TV by Dzongkhag/Town

Values	Total		Dzongkhags										Chimis	
			Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang			
	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
urban people	138	24.60%	12	13.33%	19	20.43%	23	24.21%	52	32.50%	31	27.43%	1	10.00%
rural people	40	7.13%	11	12.22%	8	8.60%	5	5.26%	9	5.63%	5	4.42%	2	20.00%
rich people	248	44.21%	40	44.44%	41	44.09%	46	48.42%	60	37.50%	58	51.33%	3	30.00%
poor people	11	1.96%	1	1.11%	3	3.23%	3	3.16%	2	1.25%	1	0.88%	1	10.00%
young people	41	7.31%	8	8.89%	6	6.45%	4	4.21%	12	7.50%	8	7.08%	3	30.00%
educated people	72	12.83%	17	18.89%	15	16.13%	13	13.68%	17	10.63%	10	8.85%	0	0.00%
Others	11	1.96%	1	1.11%	1	1.08%	1	1.05%	8	5.00%	0	0.00%	0	0.00%
Total	561	100.00%	90	100.00%	93	100.00%	95	100.00%	160	100.00%	113	100.00%	10	100.00%

E. Reading habit/ culture in Bhutan

Reading is an important pre-requisite for an informed society, one in which individuals can understand and be able to analyse print and e-media. In Bhutan, the Education Department has been promoting reading among students and adult learners. It is widely believed that people do not have the reading habit.

There is at least one bookshop in nearly every town in Bhutan. There is one public library in Thimphu. As more Bhutanese people read newspapers, a number of Indian and international publications are available, what are the reading trends? What about the reach and preference for Kuensel?

This section looks at the reading trends in society, people's interest in reading and their source of reading materials.

Table E: The survey found that only 59.9% (589) of the respondents read. About two-thirds of the respondents, 64.88% (255) did not read because they cannot read.

Table E2/E4: While most people believe that reading is important, 95.50% (848), Table E4, people seldom read in Bhutan, 40.75% (240), Table E2. Most of those who do read, read for less than half an hour a day, 24.45% (144), Table E2.

The majority of people read in the english language, 51.7 % (446) followed by dzongkha, 40.37% (338).

Table E1: The three most popular types of reading material includes newspapers, 32.4% (187), religious texts, 28.6% (165) and academic books, 24.9% (144). Rural and urban readers differ in their reading preference. Religious texts are the most common books read by rural respondents, followed by academic books, and then newspapers. The academic books they read are mostly educational texts for schools.

In urban areas, newspapers are the most widely read, followed by news and current affairs magazines. This is probably because most of the bookstores are located in urban centres while rural residents have little access to newspapers and magazines.

Apart from bookshops which seem to supply most of the reading material for readers, the Kuensel agent is the second most common source for reading material. Friends are the third most common source of books and reading materials. This is supported by the fact that many people in rural areas say they share their newspapers especially the Kuensel. They also pass on comics, magazines and share books with one another.

It is important to note that the school is a good source of books in rural areas (see Table E3) with 13.35% (208) respondents saying they get their books from school. Some of them can be from the Non-formal Education classes.

Table E2: Frequency of reading habit in a day by Rural/Urban/Dzongkhag/Town

Reading frequency	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%
Seldom	240	40.75%	111	43.02%	129	38.97%	30	32.97%	50	38.76%	40	48.19%	68	40.72%	51	47.66%	1	8.33%
Less than 30 minutes	144	24.45%	59	22.87%	85	25.68%	27	29.67%	37	28.68%	16	19.28%	33	19.76%	31	28.97%	0	0.00%
30 minutes to 1 hour	118	20.03%	47	18.22%	71	21.45%	15	16.48%	20	15.50%	18	21.69%	43	25.75%	14	13.08%	8	66.67%
More than 1 hour	87	14.77%	41	15.89%	46	13.90%	19	20.88%	22	17.05%	9	10.84%	23	13.77%	11	10.28%	3	25.00%
Total	589	100.00%	258	100.00%	331	100.00%	91	100.00%	129	100.00%	83	100.00%	167	100.00%	107	100.00%	12	100.00%

Table E3: Sources of reading materials by Rural/Urban/Dzongkhag/Town and area

Source	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang	
	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%
Book shop	346	43.80%	138	42.20%	208	44.92%	47	45.63%	95	65.52%	61	45.86%	79	29.15%	54	46.55%
Friends	116	14.68%	55	16.82%	61	13.17%	16	15.53%	13	8.97%	16	12.03%	51	18.82%	18	15.52%
Family	11	1.39%	6	1.83%	5	1.08%	0	0.00%	0	0.00%	2	1.50%	7	2.58%	1	0.86%
Kuensel agent	144	18.23%	51	15.60%	93	20.09%	21	20.39%	23	15.86%	26	19.55%	47	17.34%	22	18.97%
Library	33	4.18%	13	3.98%	20	4.32%	3	2.91%	1	0.69%	2	1.50%	21	7.75%	3	2.59%
School	104	13.16%	56	17.13%	48	10.37%	8	7.77%	8	5.52%	19	14.29%	57	21.03%	12	10.34%
Office	30	3.80%	7	2.14%	23	4.97%	4	3.88%	5	3.45%	7	5.26%	8	2.95%	6	5.17%
Others	6	0.76%	1	0.31%	5	1.08%	4	3.88%	0	0.00%	0	0.00%	1	0.37%	0	0.00%
Total	790	100.00%	327	100.00%	463	100.00%	103	100.00%	145	100.00%	133	100.00%	271	100.00%	116	100.00%

Kuensel newspaper and other newspapers and magazines

Table E5: Kuensel's readership comprises, 60 % (561) of the respondents.

Table E7: More than half the respondents, 54.4% (305) said they read the newspaper for news and information, and 32.4% (182) to learn or for education.

Table E6: People were asked what they preferred in the Kuensel. 42.6% (239) said the found national news most interesting, followed by the literary page and government stories in the second place (both tying with 11.9% (67). Religious stories and editorials followed in the fourth and fifth most popular places.

Least interesting stories for 38.7% (217) was international news, followed by government stories 13.4% (75), and religious stories, 9.45% (53)

Almost all the chimis in a focus group, 12 out of 14, read the kuensel. The other two do not receive the newspaper. This is consistent with discussions with the chimis who have pointed out the importance of having access to the Kuensel to help them keep abreast of national development, and to enable them to help explain policy to their communities.

Table E8: 18% (101) of the readers feel that Kuensel could provide more coverage on sports. 15.3% (86) wanted more notices and tenders, and 8.56% (48) wanted more on the leisure page.

Table E9: Advertisements seem to have an impact on Kuensel readers with, 36.01% (202) stating that the ads prompted them to either buy and seek, or want to buy and seek the products and services. Most of these people, 64.3% (130) are living in urban areas. This is because many of the services or products advertised are generally from urban establishments and target an urban population.

With the request for Kuensel to provide more notices and tenders, there is potential for Kuensel to aim its advertising towards the government and corporate sector where employment opportunities, contracts and official notices originate.

Table E10: Bhutanese are also beginning to read more international magazines and newspapers with a greater variety of print material available in bookstores. The most popular are entertainment and leisure magazines read by 15.15% (85) of the respondents. This is followed by Newsweek magazine, 14.62% (82) and Indian news magazines, 13.01% (73).

Table E1 1: Overall, people find the costs of print media – newspapers and magazines affordable. 44.29% (221) respondents say prices of print media are affordable, 28.46% (142) find them cheap and 27.25%/ 136 say they are expensive.

Specifically on the price of Kuensel, 45.4% (242) found it affordable, 21.58% (11) say it is cheap, and 33.02% (176) find it expensive.

Table E6: Preference for Kuensel by Dzongkhag/Town

	Total				Bumthang				Gelephu				Phuentsholing				Thimphu				Trashigang				Chimis					
	Most		Least		Most		Least		Most		Least		Most		Least		Most		Least		Most		Least		Most		Least			
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%		
1. Advertisements and classified	8	1.43%	7	1.25%	0	0.00%	2	25.00%	3	42.86%	1	12.50%	2	28.57%	3	37.50%	2	28.57%	1	12.50%	0	0.00%	1	12.50%	0	0.00%	0	0.00%		
	11	1.96%	13	2.32%	2	18.18%	4	30.77%			1	9.09%	2	15.38%	6	54.55%	6	46.15%	0	0.00%	1	7.69%	0	0.00%	0	0.00%	0	0.00%		
2. Crime																														
3. Editorials	37	6.60%	25	4.46%	5	13.51%	1	4.00%			6	16.22%	6	24.00%	8	21.62%	4	16.00%	14	37.84%	11	44.00%	2	5.41%	2	8.00%	2	5.41%	1	4.00%
4. Government stories	67	11.94%	75	13.37%	9	13.43%	13	17.33%			14	20.90%	13	17.33%	14	20.90%	14	18.67%	13	19.40%	20	26.67%	15	22.39%	13	17.33%	2	2.99%	2	2.67%
5. International stories	35	6.24%	50	8.91%	5	14.29%	10	20.00%			6	17.14%	10	20.00%	4	11.43%	7	14.00%	17	48.57%	15	30.00%	3	8.57%	8	16.00%	0	0.00%	0	0.00%
6. Leisure page	20	3.57%	20	3.57%	1	5.00%	0	0.00%			4	20.00%	4	20.00%	4	20.00%	5	25.00%	7	35.00%	7	35.00%	3	15.00%	4	20.00%	1	5.00%	0	0.00%
7. Literary page	67	11.94%	36	6.42%	16	23.88%	7	19.44%			2	2.99%	2	5.56%	7	10.45%	7	19.44%	26	38.81%	14	38.89%	15	22.39%	6	16.67%	1	1.49%	0	0.00%
8. Letters	5	0.89%	19	3.39%	2	40.00%	0	0.00%			0	0.00%	5	26.32%	1	20.00%	5	26.32%	2	40.00%	6	31.58%	0	0.00%	3	15.79%	0	0.00%	0	0.00%
9. National news	239	42.60%	217	38.68%	34	14.23%	36	16.59%			53	22.18%	50	23.04%	36	15.06%	29	13.36%	56	23.43%	53	24.42%	55	23.01%	43	19.82%	5	2.09%	6	2.76%
10. Notices and tenders	12	2.14%	12	2.14%	5	5.56%	1	1.11%			2	1.87%	1	0.93%	3	3.49%	3	3.49%	1	0.63%	2	1.26%	1	0.93%	4	3.74%	0	0.00%	1	8.33%
11. Religious stories	39	6.95%	53	9.45%	8	8.89%	13	14.44%			11	10.28%	10	9.35%	2	2.33%	5	5.81%	9	5.66%	11	6.92%	9	8.41%	12	11.21%	0	0.00%	2	16.67%
12. Sports	3	0.53%	6	1.07%	0	0.00%	1	1.11%			2	1.87%	2	1.87%	0	0.00%	0	0.00%	0	0.00%	2	1.26%	1	0.93%	1	0.93%	0	0.00%	0	0.00%
13. Others	18	3.21%	28	4.99%	3	3.33%	4	4.44%			3	2.80%	1	0.93%	5	5.81%	3	3.49%	5	3.14%	10	6.29%	2	1.87%	10	9.35%	0	0.00%	0	0.00%
Total	561	100.00%	561	100.00%	90	100.00%	90	100.00%	107	100.00%	107	100.00%	107	100.00%	86	100.00%	86	100.00%	159	100.00%	159	100.00%	107	100.00%	107	100.00%	12	100.00%	12	100.00%

Table E8: Choice of Subjects/topics to feature more of in Kuensel by Dzongkhag/Town

	Total		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1. Advertisements and classified	37	6.60%	6	6.67%	6	5.61%	6	6.98%	13	8.18%	6	5.61%	0	0.00%
2. Crime	44	7.84%	12	13.33%	4	3.74%	7	8.14%	18	11.32%	2	1.87%	1	8.33%
3. Editorials	19	3.39%	1	1.11%	0	0.00%	8	9.30%	4	2.52%	4	3.74%	2	16.67%
4. Government stories	13	2.32%	1	1.11%	3	2.80%	0	0.00%	7	4.40%	2	1.87%	0	0.00%
5. International stories	17	3.03%	4	4.44%	2	1.87%	2	2.33%	8	5.03%	1	0.93%	0	0.00%
6. Leisure page	48	8.56%	4	4.44%	8	7.48%	14	16.28%	9	5.66%	12	11.21%	1	8.33%
7. Literary page	14	2.50%	0	0.00%	4	3.74%	1	1.16%	5	3.14%	2	1.87%	2	16.67%
8. Letters and debates	21	3.74%	1	1.11%	3	2.80%	2	2.33%	7	4.40%	7	6.54%	1	8.33%
9. National news	32	5.70%	4	4.44%	12	11.21%	2	2.33%	7	4.40%	7	6.54%	0	0.00%
10. Notices and tenders	86	15.33%	12	13.33%	15	14.02%	15	17.44%	23	14.47%	20	18.69%	1	8.33%
11. Religious stories	14	2.50%	4	4.44%	2	1.87%	1	1.16%	1	0.63%	6	5.61%	0	0.00%
12. Sports	101	18.00%	22	24.44%	17	15.89%	10	11.63%	27	16.98%	22	20.56%	3	25.00%
13. Others	115	20.50%	19	21.11%	31	28.97%	18	20.93%	30	18.87%	16	14.95%	1	8.33%
Total	561	100.00%	90	100.00%	107	100.00%	86	100.00%	159	100.00%	107	100.00%	12	100.00%

Table E11: Affordability of print media/Kuensel by Rural/Urban/Dzongkhag/Town

Prices/affordability	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No	%	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
<i>Prices of print media papers/magazines;</i>																		
affordable	221	44.29%	80	38.28%	141	48.62%	35	43.75%	46	46.00%	29	38.16%	69	47.26%	36	42.35%	6	50.00%
cheap	142	28.46%	63	30.14%	79	27.24%	21	26.25%	25	25.00%	30	39.47%	38	26.03%	26	30.59%	2	16.67%
expensive	136	27.25%	66	31.58%	70	24.14%	24	30.00%	29	29.00%	17	22.37%	39	26.71%	23	27.06%	4	33.33%
Total	499	100.00%	209	100.00%	290	100.00%	80	100.00%	100	100.00%	76	100.00%	146	100.00%	85	100.00%	12	100.00%
<i>Kuensel price;</i>																		
affordable	242	45.40%	82	37.27%	160	51.12%	40	46.51%	48	47.06%	30	35.29%	70	44.87%	47	51.09%	7	58.33%
cheap	115	21.58%	52	23.64%	63	20.13%	23	26.74%	25	24.51%	16	18.82%	22	14.10%	29	31.52%	0	0.00%
expensive	176	33.02%	86	39.09%	90	28.75%	23	26.74%	29	28.43%	39	45.88%	64	41.03%	16	17.39%	5	41.67%
Total	533	100.00%	220	100.00%	313	100.00%	86	100.00%	102	100.00%	85	100.00%	156	100.00%	92	100.00%	12	100.00%

Table F: Use of Internet and frequency by Rural/Urban/Dzongkhag/Town

Use frequency	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No	%	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Internet user	95	9.67%	13	2.63%	82	16.84%	4	2.31%	10	4.46%	32	31.68%	42	17.80%	4	1.71%	3	21.43%
Not user	887	90.33%	482	97.37%	405	83.16%	169	97.69%	214	95.54%	69	68.32%	194	82.20%	230	98.29%	11	78.57%
Total	982	100.00%	495	100.00%	487	100.00%	173	100.00%	224	100.00%	101	100.00%	236	100.00%	234	100.00%	14	466.67%
Frequency;																		
1-2 times a week	19	20.00%	5	38.46%	14	17.07%	2	50.00%	4	40.00%	7	21.88%	5	11.90%	0	0.00%	1	33.33%
2-3 times a week	15	15.79%	2	15.38%	13	15.85%	0	0.00%	3	30.00%	3	9.38%	8	19.05%	0	0.00%	1	33.33%
3-6 times a week	12	12.63%	0	0.00%	12	14.63%	0	0.00%	1	10.00%	5	15.63%	5	11.90%	1	25.00%	0	0.00%
everyday	32	33.68%	2	15.38%	30	36.59%	0	0.00%	0	0.00%	11	34.38%	17	40.48%	3	75.00%	1	33.33%
only a few times	12	12.63%	4	30.77%	8	9.76%	0	0.00%	1	10.00%	4	12.50%	7	16.67%	0	0.00%	0	0.00%
any other times	5	5.26%	0	0.00%	5	6.10%	2	50.00%	1	10.00%	2	6.25%	0	0.00%	0	0.00%	0	0.00%
Total	95	100.00%	13	100.00%	82	100.00%	4	100.00%	10	100.00%	32	100.00%	42	100.00%	4	100.00%	3	100.00%

Table F1: Location of Internet use by Rural/Urban/Dzongkhag/Town

Location	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No	%	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
At home	19	20.00%	3	23.08%	16	19.51%	0	0.00%	4	40.00%	6	18.75%	6	14.29%	2	50.00%	1	33.33%
Office	53	55.79%	6	46.15%	47	57.32%	2	50.00%	3	30.00%	17	53.13%	28	66.67%	2	50.00%	1	33.33%
Internet café	20	21.05%	4	30.77%	16	19.51%	1	25.00%	3	30.00%	7	21.88%	8	19.05%	0	0.00%	1	33.33%
Other place	3	3.16%	0	0.00%	3	3.66%	1	25.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Total	95	100.00%	13	100.00%	82	100.00%	4	100.00%	10	100.00%	32	100.00%	42	100.00%	4	100.00%	3	100.00%

Table F2: Frequency of access to Kuenselonline by Dzongkhag/Town

Frequency	Total		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Everyday	15	15.79%	0	0.00%	2	22.22%	4	12.50%	8	19.05%	0	0.00%	1	25.00%
2-3 times a week	28	29.47%	0	0.00%	2	22.22%	12	37.50%	10	23.81%	3	75.00%	1	25.00%
Once a week	30	31.58%	2	50.00%	3	33.33%	7	21.88%	16	38.10%	1	25.00%	1	25.00%
No access	22	23.16%	2	50.00%	2	22.22%	9	28.13%	8	19.05%	0	0.00%	1	25.00%
Total	95	100.00%	4	100.00%	9	100.00%	32	100.00%	42	100.00%	4	100.00%	4	100.00%

Table F3: Content read on kuenselonline by Dzongkhag/Town

Content	Total		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Advertising	4	5.48%	0	0.00%	0	0.00%	1	4.35%	2	5.88%	0	0.00%	1	33.33%
Editorials	10	13.70%	0	0.00%	2	28.57%	5	21.74%	2	5.88%	0	0.00%	1	33.33%
News	33	45.21%	2	100.00%	1	14.29%	10	43.48%	18	52.94%	1	25.00%	1	33.33%
Notices	4	5.48%	0	0.00%	3	42.86%	1	4.35%	0	0.00%	0	0.00%	0	0.00%
Tenders	4	5.48%	0	0.00%	0	0.00%	1	4.35%	2	5.88%	1	25.00%	0	0.00%
Literary prog.	3	4.11%	0	0.00%	1	14.29%	0	0.00%	2	5.88%	0	0.00%	0	0.00%
From readers	10	13.70%	0	0.00%	0	0.00%	2	8.70%	7	20.59%	1	25.00%	0	0.00%
Others	5	6.85%	0	0.00%	0	0.00%	3	13.04%	1	2.94%	1	25.00%	0	0.00%
Total	73	100.00%	2	100.00%	7	100.00%	23	100.00%	34	100.00%	4	100.00%	3	100.00%

Table F5: Frequency of access to BBS website by Dzongkhag/Town

Frequency	Total		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Once a week	28	38.89%	2	100.00%	5	71.43%	8	34.78%	10	31.25%	2	50.00%	1	25.00%
2-3 times a week	13	18.06%	0	0.00%	0	0.00%	4	17.39%	8	25.00%	0	0.00%	1	25.00%
Everyday	9	12.50%	0	0.00%	1	14.29%	4	17.39%	2	6.25%	1	25.00%	1	25.00%
Do not access	22	30.56%	0	0.00%	1	14.29%	7	30.43%	12	37.50%	1	25.00%	1	25.00%
Total	72	100.00%	2	100.00%	7	100.00%	23	100.00%	32	100.00%	4	100.00%	4	100.00%

Table F6: Perception of usefulness of BBS website by Dzongkhag/Town

Dzongkhag/Town	Total		Usefulness			
	No.	%	Useful		Not useful	
			No.	%	No.	%
Bumthang	4	5.56%	4	6.15%	0	0.00%
Gelephu	9	12.50%	8	12.31%	1	14.29%
Thimphu	30	41.67%	25	38.46%	5	71.43%
Trashigang	4	5.56%	3	4.62%	1	14.29%
Phuentsholing	21	29.17%	21	32.31%	0	0.00%
Chimis	4	5.56%	4	6.15%	0	0.00%
Total	72	100.00%	65	100.00%	7	100.00%

Tables F8-12 Looks at how people use the internet, their perception of the credibility of the medium, and factors preventing their use.

Table F8: It is clear from the survey that the internet is used mainly for email, 37.89% (36), followed by news and information, 26.32% (25) and finally for chat, 12.63% (36). Only 6.32% of the respondents said they used it for work and 4.21% use it for research. The internet is also rarely used for entertainment and not at all for shopping.

Table F9: Respondents felt that the Internet is best used for communication, 35.79% (34), for research, 20%, and for information 18.95%.

Table F10 shows that 55.7% (53) respondents find the Internet believable.

Table F1 1: The dominant factor preventing people from using the Internet is the cost. 50.53% (48) say they find the internet expensive to use.

Table F12 looks at how people feel about pornography on the net, and their preference for controls of internet pornography.

It is virtually impossible to filter or control the Internet with its millions of pages. Druknet stopped filtering pornography content in 2001 on the grounds that the funds of filtering could be better used for other purposes. Apart from the technical challenges of filtering and controls, content filtering is, today, considered a breach of the fundamental philosophy of the world wide web – a free, easy, and accessible medium of information and entertainment.

57.8% (55) say they are for controls compared to 42.1% who believe the government should not control pornography. Focus group discussants say people should learn to judge the good from bad.

Table F9: Best use of Internet in Bhutan by Dzongkhag/Town

	Total		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
For research	19	20.00%	2	50.00%	3	30.00%	4	12.50%	10	23.81%	0	0.00%	0	0.00%
For communicatioun	34	35.79%	1	25.00%	3	30.00%	13	40.63%	13	30.95%	1	25.00%	3	100.00%
For entertainment	5	5.26%	0	0.00%	0	0.00%	3	9.38%	2	4.76%	0	0.00%	0	0.00%
For doing business	11	11.58%	1	25.00%	1	10.00%	5	15.63%	4	9.52%	0	0.00%	0	0.00%
For information	18	18.95%	0	0.00%	2	20.00%	5	15.63%	9	21.43%	2	50.00%	0	0.00%
Others	8	8.42%	0	0.00%	1	10.00%	2	6.25%	4	9.52%	1	25.00%	0	0.00%
Total	95	100.00%	4	100.00%	10	100.00%	32	100.00%	42	100.00%	4	100.00%	3	100.00%

Table F10: Believability of Internet by Dzongkhag/Town and Rural/Urban

Dzongkhag/Town	Total		Believability			
	No.	%	Believable	%	Not believable	%
Bumthang	4	4.21%	2	3.77%	2	4.76%
Gelephu	10	10.53%	6	11.32%	4	9.52%
Thimphu	42	44.21%	20	37.74%	22	52.38%
Trashigang	4	4.21%	2	3.77%	2	4.76%
Phuentsholing	32	33.68%	23	43.40%	9	21.43%
Chimis	3	3.16%	0	0.00%	3	7.14%
TOTAL	95	100.00%	53	100.00%	42	100.00%
Rural	14	14.74%	5	9.43%	9	21.43%
Urban	81	85.26%	48	90.57%	33	78.57%

G. FILM and MUSIC

This section deals with a relatively new but fast growing industry in Bhutan – film and music. The development of Bhutanese film and music has been most visible trend in the past decade. There have been more than 46 Bhutanese films released since 1987; in 2003 alone, ten films were released. In the music market, two or three local albums are released each month. This section looks at people's preference in films and music. While analyzing the findings, it must be pointed out that even before the production of local films and the introduction of TV, Bhutanese have had access to video films. This section also provides an understanding of the frequency of video viewing, and its popularity.

Tables G1/G2: Table G1 shows that 80.24% (788) watch films and 19.7% (194) do not. Most of them watch films on TV, 44.3% (435), and 31.8% (251) go to the cinema mostly for Bhutanese films. Of the total respondents, 78.5% (663) have watched Bhutanese films. Table G2 shows that, on average, 48.1% (407), most people watched between one to two Bhutanese films in the past six months. 24.6% (208) watched 3-5 films in the past half year, and only 5.6% watched more than five films in the same period.

Table G3: Bhutanese films are generally well received by Bhutanese viewers with 50% (394) giving them a good rating, 7.8% a very good rating, 31.6% (249) an average rating, and 10.53% (83) a poor rating. It is interesting to note that more rural viewers gave Bhutanese films very good ratings compared with urban viewers.

Table G4: Affordability

This table shows the affordability of local movies and music tapes and provides an indication of people's spending ability.

An average movie ticket ranges from Nu.40/-75/- depending on the location of screening. In Thimphu, tickets cost as much as Nu.150/- in one of the newly established cinema halls.

A majority of respondents, 70.31% (559) found movie tickets to be expensive, 18.99% (151) affordable, and 10.69% (85) found the ticket prices to be average.

Music cassettes retail for an average of Nu.65/-Nu.75/-. A few selected cassettes are priced at Nu100/- (Move for Health cassette).

The survey shows that 48.06% (409) found music cassettes expensive, 33.61% (286) affordable, and 18.33% (156) found the costs average (also see table H14). Many people comment on the poor quality of cassettes/tapes and say that, for what they pay, the quality should be better.

Table G5: V ideo watching. About half, 49.52% (410) of the respondents watched videos/ VCD/ DVD between 1-3 times a week. Another 43.7% (362) respondents never watch videos. Only 1.33% respondents said they watched videos, VCD/ DVDs every day. In general, video rentals interviewed say video viewing has dropped since the advent of TV.

Table G1: Viewing of movies and location for viewing by Dzongkhag/Town and Rural/Urban

Dzongkhag/Town	Total Viewers/ Never View		Watch films/movies		Never watch films/movies		Total Viewing Location		Cinema		TV		Other places	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Bumthang	171	17.41%	138	17.51%	33	17.01%	138	17.51%	34	13.55%	67	15.40%	37	36.27%
Gelephu	212	21.59%	168	21.32%	44	22.68%	168	21.32%	67	26.69%	80	18.39%	21	20.59%
Thimphu	247	25.15%	209	26.52%	38	19.59%	209	26.52%	63	25.10%	120	27.59%	26	25.49%
Trashigang	239	24.34%	165	20.94%	74	38.14%	165	20.94%	40	15.94%	107	24.60%	18	17.65%
Phuentsholing	99	10.08%	99	12.56%	0	0.00%	99	12.56%	46	18.33%	53	12.18%	0	0.00%
Chimis	14	1.43%	9	1.14%	5	2.58%	9	1.14%	1	0.40%	8	1.84%	0	0.00%
Total	982	100.00%	788	100.00%	194	100.00%	788	100.00%	251	100.00%	435	100.00%	102	100.00%
Rural	470	47.86%	322	40.86%	148	76.29%	328	41.62%	134	53.39%	132	30.34%	62	60.78%
Urban	498	50.71%	457	57.99%	41	21.13%	451	57.23%	116	46.22%	295	67.82%	40	39.22%

Table G3: Rating of quality of Bhutanese films by Dzongkhag/Town and rural/urban

Dzongkhag/Town	Total		Poor		Average		Good		Very good	
			No.	%	No.	%	No.	%	No.	%
Bumthang	148	18.78%	14	16.87%	45	18.07%	72	18.27%	17	27.42%
Gelephu	176	22.34%	24	28.92%	36	14.46%	102	25.89%	14	22.58%
Phuentsholing	91	11.55%	11	13.25%	44	17.67%	34	8.63%	2	3.23%
Thimphu	207	26.27%	30	36.14%	79	31.73%	88	22.34%	10	16.13%
Trashigang	157	19.92%	4	4.82%	39	15.66%	95	24.11%	19	30.65%
Chimis	9	1.14%	0	0.00%	6	2.41%	3	0.76%	0	0.00%
Total	788	100.00%	83	100.00%	249	100.00%	394	100.00%	62	100.00%
Rural	354	44.92%	33	39.76%	100	40.16%	176	44.67%	45	72.58%
Urban	434	55.08%	50	60.24%	149	59.84%	218	55.33%	17	27.42%

Table G5: Frequency of watching Video/VCD/DVD by Dzongkhag/Town and area

Frequency	Total		Urban		Rural		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No	%	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Never	362	43.72%	235	50.87%	127	34.70%	50	33.78%	84	44.21%	58	61.70%	105	48.17%	65	38.46%	0	0.00%
1-3 times a week	410	49.52%	199	43.07%	211	57.65%	83	56.08%	97	51.05%	33	35.11%	101	46.33%	88	52.07%	8	88.89%
3-6 times a week	45	5.43%	23	4.98%	22	6.01%	12	8.11%	8	4.21%	3	3.19%	7	3.21%	15	8.88%	0	0.00%
Everyday	11	1.33%	5	1.08%	6	1.64%	3	2.03%	1	0.53%	0	0.00%	5	2.29%	1	0.59%	1	11.11%
Total	828	100.00%	462	100.00%	366	100.00%	148	100.00%	190	100.00%	94	100.00%	218	100.00%	169	100.00%	9	100.00%

Table G6: Types of Videos/VCDs/DVDs watched by Dzongkhag/Town and area

Types	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No	%	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Bhutanese	305	48.18%	195	64.78%	110	33.13%	85	63.91%	46	37.10%	23	27.71%	83	49.40%	63	55.75%	5	41.67%
Hindi	247	39.02%	91	30.23%	156	46.99%	41	30.83%	66	53.23%	35	42.17%	53	31.55%	46	40.71%	6	50.00%
Western	77	12.16%	12	3.99%	65	19.58%	7	5.26%	9	7.26%	24	28.92%	32	19.05%	4	3.54%	1	8.33%
Others	4	0.63%	3	1.00%	1	0.30%	0	0.00%	3	2.42%	1	1.20%	0	0.00%	0	0.00%	0	0.00%
Total	633	100.00%	301	100.00%	332	100.00%	133	100.00%	124	100.00%	83	100.00%	168	100.00%	113	100.00%	12	100.00%

Note: Respondents chose more than 1 type of Video/VCD/DVD

Table G8: Peoples' favourite music by Dzongkhag/Town and area

Music types	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No	%	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Boedra	83	8.34%	45	9.55%	38	7.25%	11	6.59%	8	3.90%	14	11.02%	34	13.13%	11	4.93%	5	35.71%
Rigsar	488	49.05%	203	43.10%	285	54.39%	74	44.31%	100	48.78%	56	44.09%	128	49.42%	126	56.50%	4	28.57%
Zhungdra	256	25.73%	183	38.85%	73	13.93%	63	37.72%	35	17.07%	13	10.24%	76	29.34%	65	29.15%	4	28.57%
Bollywood/Hindi songs	110	11.06%	34	7.22%	76	14.50%	15	8.98%	45	21.95%	24	18.90%	12	4.63%	13	5.83%	1	7.14%
Western, pop/rock	42	4.22%	0	0.00%	42	8.02%	3	1.80%	9	4.39%	16	12.60%	9	3.47%	5	2.24%	0	0.00%
Others	16	1.61%	6	1.27%	10	1.91%	1	0.60%	8	3.90%	4	3.15%	0	0.00%	3	1.35%	0	0.00%
Total	995	100.00%	471	100.00%	524	100.00%	167	100.00%	205	100.00%	127	100.00%	259	100.00%	223	100.00%	14	100.00%

Table G9: Favourite movie Star by Dzongkhag/Town and area

Name of movie star	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No	%	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Bhutanese	242	30.71%	165	49.85%	77	16.85%	88	63.77%	0	0.00%	14	14.14%	59	28.23%	75	45.45%	6	66.67%
Western	17	2.16%	3	0.91%	14	3.06%	5	3.62%	1	0.60%	3	3.03%	1	0.48%	7	4.24%	0	0.00%
Indian	119	15.10%	38	11.48%	81	17.72%	40	28.99%	11	6.55%	5	5.05%	12	5.74%	48	29.09%	3	33.33%
Don't know	410	52.03%	125	37.76%	285	62.36%	5	3.62%	156	92.86%	77	77.78%	137	65.55%	35	21.21%	0	0.00%
Total	788	100.00%	331	100.00%	457	100.00%	138	100.00%	168	100.00%	99	100.00%	209	100.00%	165	100.00%	9	100.00%

Table H1: Improvement in access to media by Rural/Urban/Dzongkhag/Town

	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%
Improved	853	86.86%	420	86.42%	433	87.30%	155	89.60%	171	76.34%	83	82.18%	206	87.29%	228	97.44%	10	71.43%
No improvement	129	13.14%	66	13.58%	63	12.70%	18	10.40%	53	23.66%	18	17.82%	30	12.71%	6	2.56%	4	28.57%
Total	982	100.00%	486	100.00%	496	100.00%	173	100.00%	224	100.00%	101	100.00%	236	100.00%	234	100.00%	14	100.00%

Table H2: Believability of media in general by Rural/Urban/Dzongkhag/Town

	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%
Bhutanese media;																		
believable	886	90.22%	428	86.46%	458	94.05%	143	82.66%	196	87.50%	96	95.05%	230	97.46%	211	90.17%	10	71.43%
not believable	21	2.14%	13	2.63%	8	1.64%	11	6.36%	3	1.34%	0	0.00%	4	1.69%	3	1.28%	0	0.00%
Don't Know	75	7.64%	54	10.91%	21	4.31%	19	10.98%	25	11.16%	5	4.95%	2	0.85%	20	8.55%	4	28.57%
Total	982	100.00%	495	100.00%	487	100.00%	173	100.00%	224	100.00%	101	100.00%	236	100.00%	234	100.00%	14	100.00%
International media;																		
believable	634	64.56%	304	61.41%	330	67.76%	93	53.76%	170	75.89%	72	71.29%	140	59.32%	155	66.24%	4	28.57%
not believable	80	8.15%	37	7.47%	43	8.83%	30	17.34%	2	0.89%	9	8.91%	13	5.51%	20	8.55%	6	42.86%
Don't Know	268	27.29%	154	31.11%	114	23.41%	50	28.90%	52	23.21%	20	19.80%	83	35.17%	59	25.21%	4	28.57%
Total	982	100.00%	495	100.00%	487	100.00%	173	100.00%	224	100.00%	101	100.00%	236	100.00%	234	100.00%	14	100.00%

Table H4 and H5 shows people's preference for entertainment

Table H4: Respondents were asked what their preferred choice of entertainment would be in their spare time. 29.23% (287) chose gardening, 26.78% (263), visiting friends and 13.44% (132) chose chatting with friends and family. These findings are not unusual for a largely agrarian and oral society. Socialising and being outdoors have always been an important part of Bhutanese life.

As seen in Table H5, however, TV and radio have become the main source of entertainment for most people. TV provides entertainment for 42.57% (418) of the respondents, and radio for 39.6% (389).

Listening to music and socialising are the next most common forms of entertainment, 5.8% and 5.19%. Only 1.8% chose reading as a means of entertainment.

Table H6: Radio is the most dominant source of information for 47.86% (470) followed by TV with 37.37% (367). In an oral society, word of mouth is also an important source of information as shown by the survey where 7.43% said their friends provided their main sources of information. Newspapers and magazines are the next most common information source for a small literate group of people with only 4.07%. Not surprisingly, newspapers and magazines are more popular sources of information in urban towns where they are readily available.

Table H6: Main source of information by Rural/Urban/Dzongkhag/Town

Source of information	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No	%	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Radio	470	47.86%	344	69.49%	126	25.87%	99	57.23%	119	53.13%	4	3.96%	109	46.19%	129	55.13%	10	71.43%
TV	367	37.37%	89	17.98%	278	57.08%	49	28.32%	79	35.27%	82	81.19%	93	39.41%	62	26.50%	2	14.29%
Books	7	0.71%	4	0.81%	3	0.62%	0	0.00%	5	2.23%	0	0.00%	2	0.85%	0	0.00%	0	0.00%
Newspapers & magazines	40	4.07%	12	2.42%	28	5.75%	3	1.73%	14	6.25%	7	6.93%	15	6.36%	0	0.00%	1	7.14%
School	2	0.20%	2	0.40%	0	0.00%	1	0.58%	0	0.00%	0	0.00%	0	0.00%	1	0.43%	0	0.00%
Friends	73	7.43%	31	6.26%	42	8.62%	11	6.36%	6	2.68%	7	6.93%	17	7.20%	32	13.68%	0	0.00%
Parents	5	0.51%	4	0.81%	1	0.21%	0	0.00%	0	0.00%	1	0.99%	0	0.00%	4	1.71%	0	0.00%
Office colleagues	2	0.20%	0	0.00%	2	0.41%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	2	0.85%	0	0.00%
Others	16	1.63%	9	1.82%	7	1.44%	10	5.78%	1	0.45%	0	0.00%	0	0.00%	4	1.71%	1	7.14%
Total	982	100.00%	495	100.00%	487	100.00%	173	100.00%	224	100.00%	101	100.00%	236	100.00%	234	100.00%	14	100.00%

Table H7: Need for more information on Bhutan and entertainment by Rural/Urban/Dzongkhag/Town

	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%
Information;																		
Need more	934	95.11%	466	94.14%	468	96.10%	165	95.38%	200	89.29%	96	95.05%	231	97.88%	228	97.44%	14	100.00%
No need	48	4.89%	29	5.86%	19	3.90%	8	4.62%	24	10.71%	5	4.95%	5	2.12%	6	2.56%	0	0.00%
Total	982	100.00%	495	100.00%	487	100.00%	173	100.00%	224	100.00%	101	100.00%	236	100.00%	234	100.00%	14	100.00%
Entertainment;																		
Need more	868	88.39%	433	88.37%	435	88.41%	153	88.44%	184	82.14%	85	84.16%	213	90.25%	219	93.59%	14	100.00%
No need	114	11.61%	57	11.63%	57	11.59%	20	11.56%	40	17.86%	16	15.84%	23	9.75%	15	6.41%	0	0.00%
Total	982	100.00%	490	100.00%	492	100.00%	173	100.00%	224	100.00%	101	100.00%	236	100.00%	234	100.00%	14	100.00%

Table H8: Need for more educational programmes in media by Rural/Urban/Dzongkhag/Town

	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%
Opinion																		
Need more	935	95.21%	463	93.54%	472	96.92%	163	94.22%	201	89.73%	95	94.06%	234	99.15%	228	97.44%	14	100.00%
No need	23	2.34%	8	1.62%	15	3.08%	4	2.31%	8	3.57%	4	3.96%	2	0.85%	5	2.14%	0	0.00%
Don't know	24	2.44%	24	4.85%	0	0.00%	6	3.47%	15	6.70%	2	1.98%	0	0.00%	1	0.43%	0	0.00%
Total	982	100.00%	495	100.00%	487	100.00%	173	100.00%	224	100.00%	101	100.00%	236	100.00%	234	100.00%	14	100.00%

The next two tables look at the media's influence on the lives of people, including their sense of dress and fashion style.

Table H1 1: In a traditional society like Bhutan, many people are still bound by family ties and family members provide the biggest influence on daily lives. This is confirmed in table H11 which shows that more than half the respondents, 50.81% (499) say that their biggest influence are family members. Other influential groups include friends, 26.17% (257) and religious figures, 8.45%. Movie stars have a bigger influence on people than national leaders, (stars 6.93%: 3.77% leaders).

Table H12:

There is a common perception that Bhutanese youth and even the adult population are now drawn towards wearing western style clothing because of the influence of TV. Table H12 confirms that TV has, indeed, an influence on people's dressing.

The survey shows that 279 people, or 28.41%, of respondents get fashion ideas from TV. Friends also play a part in influencing people's sense of fashion, 24.03% (236). 17.41% (171) say they get their fashion ideas from the shops which have brought in a lot of fashion clothing from Bangkok and Bangladesh.

Table H13:

In terms of entertainment people wanted, 33.4% (328) respondents wanted more films, 29.43% (289) wanted more music concerts and 27.7% (272) wanted dramas. This also highlights people's wish for more film, music and live entertainment.

Table H14/ H15: Costs and affordability

Costs and affordability of the media are becoming more important in Bhutan today with an increasing availability of options. The question of sustainability of services such as the Kuensel and BBS, which have public service obligations, and the commercially driven entertainment media – cable TV, film, music – is relevant in a country with a small population and limited paying power.

On average, 47.7% (469) spend less than Nu.100/- on media every month (table H14). By media spending, we mean spending on audio-visual cassettes, newspaper, magazines and books, cable TV subscriptions, video hire, film tickets, internet services etc. 46% (452) spend between Nu. 100-500/-. And only 5% spend between Nu.500-Nu.1,000/- a month on media services. The average monthly media spending, therefore, is up to Nu. 500/- a month.

The majority of people are in the less than Nu. 5,000/- monthly income basket, 59.2% (582), table H15. One third, or 31.5% (310) are in the Nu. 5,000- Nu. 10,000 basket. Media spending, therefore, represents between 5 to 10 percent of their income.

Table H13: Preference for entertainment by Rural/Urban/Dzongkhag/Town

Entertainment preference	Total		Rural		Urban		Bumthang		Gelephu		Phuentsholing		Thimphu		Trashigang		Chimis	
	No	%	No	%	No	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Dramas	272	27.70%	163	32.93%	109	22.38%	51	29.48%	74	33.04%	12	11.88%	61	25.85%	71	30.34%	3	21.43%
Music concerts	289	29.43%	137	27.68%	152	31.21%	32	18.50%	60	26.79%	46	45.54%	91	38.56%	57	24.36%	3	21.43%
Films	328	33.40%	135	27.27%	193	39.63%	75	43.35%	59	26.34%	37	36.63%	62	26.27%	87	37.18%	8	57.14%
Melas	42	4.28%	23	4.65%	19	3.90%	4	2.31%	18	8.04%	5	4.95%	7	2.97%	8	3.42%	0	0.00%
Others	51	5.19%	37	7.47%	14	2.87%	11	6.36%	13	5.80%	1	0.99%	15	6.36%	11	4.70%	0	0.00%
Total	982	100.00%	495	100.00%	487	100.00%	173	100.00%	224	100.00%	101	100.00%	236	100.00%	234	100.00%	14	100.00%

Table H14: Household's average expenditure on media by Dzongkhag/Town and Rural/Urban

Dzongkhags/Town	Total		Less than Nu.100		Nu. 100-500		Nu. 500-1,000		Nu. 1,000-2,500		More than Nu. 2,500	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Bumthang	173	17.62%	91	19.40%	78	17.26%	4	7.69%	0	0.00%	0	0.00%
Gelephu	224	22.81%	111	23.67%	93	20.58%	20	38.46%	0	0.00%	0	0.00%
Phuentsholing	101	10.29%	22	4.69%	69	15.27%	7	13.46%	2	33.33%	1	33.33%
Thimphu	236	24.03%	110	23.45%	107	23.67%	15	28.85%	3	50.00%	1	33.33%
Trashigang	234	23.83%	134	28.57%	95	21.02%	4	7.69%	0	0.00%	1	33.33%
Chimis	14	1.43%	1	0.21%	10	2.21%	2	3.85%	1	16.67%	0	0.00%
Total	982	100.00%	469	100.00%	452	100.00%	52	100.00%	6	100.00%	3	100.00%
Rural	495	50.41%	348	74.20%	120	26.55%	25	48.08%	1	16.67%	1	33.33%
Urban	487	49.59%	121	25.80%	332	73.45%	27	51.92%	5	83.33%	2	66.67%

