



# Nepal Media Landscape 2014

National Opinion Survey Wave-III September 2014



**Internews**



*Interdisciplinary Analysts*



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## **National Media Landscape 2014**

Nepal Opinion Survey Wave-III September 2014

National media survey is a part of Nepal Opinion Survey conducted by Internews and IDA in September 2013, February 2014 and September 2014.

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**Antenna Foundation Nepal**

**National Democratic Institute, Nepal**

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## INTERNEWS IN NEPAL

Strengthening Political Parties, Electoral, and Legislative Process Program (SPELP)/ Consortium for Elections and Political Process Strengthening (CEPPS) program USAID/NDI

2011-2015

Internews actively engaged with media and citizens in Nepal to create platform for discussion on election-related themes. Its engagement was focused on providing Nepalese media community with more data, including graphical summaries about what citizens think about key socio-political issues. The project also helped Nepali media better understand election-related issues and strengthen the ability of radio to facilitate debates on the opinion poll results, ultimately increasing citizen participation in the electoral process.

Internews in collaboration with National Democratic Institute (NDI), worked with Antenna Foundation Nepal (AFN), Interdisciplinary Analysts (IDA), Freedom Forum and other local media partners in Nepal between January 2011 and February 2015.

During the project period Internews and its local partner Antenna Foundation Nepal trained over 200 Nepali journalists in key investigative journalism skills and data journalism tools to report on electoral reporting and political parties. Antenna produced 300 episodes of radio programs focusing on citizen's awareness on elections as well as field-based discussions on national opinion poll results.



Internews and IDA carried out 3 waves of National Opinion Polls with total of 10 thousand samples across the country on key socio-political issues, constituent assembly, political parties, local governance and media consumption behaviors. Freedom Forum another local partner operated community of practice website [www.nepalelectionchannel.org](http://www.nepalelectionchannel.org) to aggregate election and political parties related news in Nepal.

Other successful Internews engagement includes first ever National Radio Conference after 2006 in partnership with major radio organizations in Nepal, publication Data journalism handbook in Nepali language and developed online training toolkit on Investigative Journalism skills.

Data visualization and Infographics compiled in this handbook are part of National Opinion Poll series covering Nepal's latest media consumption behavior and media landscaping.

## ABOUT US



Internews is an international non-profit organization whose mission is to empower local media worldwide to give people the news and information they need, the ability to connect and the means to make their voices heard.

Internews provides communities the resources to produce local news and information with integrity and independence. With global expertise and reach, Internews trains both media professionals and citizen journalists, introduces innovative media solutions, increases coverage of vital issues and helps establish policies needed for open access to information. Internews programs create platforms for

dialogue and enable informed debate, which bring about social and economic progress.

Internews' commitment to research and evaluation creates effective and sustainable programs, even in the most challenging environments.

Internews operates internationally, with administrative centers in California, Washington DC, and London, as well as regional hubs in Bangkok and Nairobi. Formed in 1982, Internews has worked in more than 90 countries, and currently has offices in Africa, Asia, Europe, the Middle East, Latin America and North America.





## WHAT WE DO

At Internews, we work to ensure that the free flow of trusted information empowers people to make informed decisions about their lives and their futures.



Expand  
information  
access



Improve  
Quality  
News and  
Information



Support  
Media and  
Information  
Stability



Strengthen  
the enabling  
Environment



## OUR APPROACH

We partner with local organizations to support strong, independent media and a free, open and safe Internet.

We believe that information is a for personal, social and global well-being - as fundamental as food and water.

We work where information flows are restricted and with marginalized and disadvantaged groups who live with poverty, deprivation and illiteracy.

We act where there is opportunity to build healthier and more robust information environments

We support innovation and emerging ideas that fit local needs and address gaps where markets fail.

We partner with local organizations to develop quality content and ensure people get the right information, at the right time, from sources they trust.





# RESEARCH METHODOLOGY

## NATIONWIDE OPINION SURVEY

### WAVE I, II & III

Internews subcontracted Interdisciplinary Analysts (IDA) to undertake three public opinion surveys in 2013 and 2014.

All of the respondents were aged 18 or above. Multistage sampling technique was employed to determine the sample units representing the national population in the country. In the first stage, a number of districts of Nepal's 75 districts were selected using stratified random sampling to represent the 16 distinct regions defined by Nepal's five development regions and three ecological zones, along with the Kathmandu Valley. In the second stage, simple random sampling technique was used to select proportional numbers of village development committees (VDCs) and municipalities from the sampled districts. In the third stage, wards from the sampled VDCs were selected based on simple random sampling. In the fourth stage, the right-hand rule was employed to select households in each sampled ward. Finally in the fifth stage, a respondent from each household was selected using Kish grid table i.e., a table of random numbers, to ensure that each eligible member in a selected household has an equal chance of being selected.

The margin of error was +/- 1.8 percent at a 95 percent confidence level at the national level for

wave I and II and +/- 1.5 percent at a 95 percent confidence level at the national level for wave III. The survey does not claim the same level of precision at either the regional or the district levels.

Experienced field personnel comprising of supervisors and interviewers administered the survey. Prior to their deployment in the field, training was conducted to orient them on the objectives of the survey, their expected roles and responsibilities, survey research methodology and field operation plan, sampling design, survey questionnaires, and things that the field team should consider while undertaking the fieldwork, such as manners and etiquette. In addition, mock test was conducted among enumerators so as to familiarize them with survey questionnaire.

	Wave I	Wave II	Wave III
Sample size	3,004	3,000	4,021
Error margin	+/- 1.8	+/- 1.8	+/- 1.5
Number of districts sampled	31	31	44
No of fieldwork personnel	52	50	72
Pre-test date(s)	Sept. 11, 2013	Jan. 27, 2014	Aug. 7 & 8, 2014
Training dates	Sep. 15 & 16, 2013	Jan. 29 & 30, 2014	Aug. 22 to 26, 2014
Duration of the fieldwork	Sep 18. to Oct. 8, 2013	Feb. 2 to 24, 2014	Aug. 29 to Sep. 29, 2014
Survey administration format	Hard copy	Hard copy	Tablet using REMO
Short hand for survey	Sep-13	Feb-14	Sep-14

For Wave III of the national opinion polls, 72 experienced field personnel comprising of 24 supervisors and 48 interviewers administered the survey. Prior to their deployment in the field, four-day training was conducted to orient them on the objectives of the survey, their expected roles and responsibilities, survey research methodology and field operation plan, sampling design, survey questionnaires, and things that the field team should consider while undertaking the fieldwork, such as manners and etiquette. In addition, mock test was conducted among enumerators so as to familiarize them with survey questionnaire. The training included practising with Tablet-based questionnaire. The questionnaire was designed as an "app" through software known as "Remo". The field personnel were instructed to conduct the interview in Tablet using Remo. Fieldworkers were deployed on August 29, 2014 and the fieldwork ended on September 29, 2014.

While for single response questions, the total percentage adds up to 100, the total exceeds 100 percent for questions that require two or more responses. The total percentage figure reflects the total of respondents rather than the total of responses.

Table 1: Sample composition by caste/ethnic group

Caste/ethnicity	Population %	Sep. 2014
Chhetri	16.6	15.3
Bahun	12.1	13.2
Magar	7.1	7.5
Tharu	6.6	7.7
Tamang	5.8	6
Newar	4.9	5.3
Kami	4.8	4.6
Muslim	4.3	4.3
Yadav	3.9	4.7
Rai	2.3	2
Gurung	1.9	2.1
Dami/Pariyar	1.7	2
Thakuri	1.6	1.8
Limbu	1.4	1.4
Sarki/Mijar	1.4	0.9
Teli	1.3	1.9
Chamar	1.2	1.5
Koiri	1.1	2.5
Sanyasi	0.8	0.4
Kurmi	0.8	0.1
Dhanuk	0.8	0.5
Musahar	0.8	1
Dusahad/Pasawan	0.7	0.6
Mallaha	0.6	0.3
Kewat	0.5	0.4
Terai Bramhin	0.5	0.9
Baniya	0.5	0.8
Sherpa	0.4	0.2
Gharti/Bhujel	0.4	0.3
Kalwaar	0.4	0.3

Kumal	0.4	0.7
Kanu	0.4	0.6
Hajam	0.4	0.3
Rajbanshi	0.4	0.7
Dhobi	0.4	0.4
Halwai	0.3	0.1
Majhi	0.3	0.3
Sudi	0.3	0.5
Lohar	0.3	0.2
Tatma	0.3	0.1
Khatwe	0.3	0.5
Sonar	0.2	0.3
Kumhar	0.2	0
Bantar/Sardar	0.2	0.3
Kahar	0.2	0.2
Sunuwar	0.2	0.9
Nuniya	0.2	0.4
Sunar	0.2	0
Satar	0.2	0
Marwadi	0.2	0
Kayastha	0.2	0.1
Rajput	0.2	0.1
Jhangar	0.1	0.2
Gangai	0.1	0.1
Lodha	0.1	0
Badahi	0.1	0.1
Bhote	0.1	0
Badai	0.1	0
Bhedihar	0.1	0
Dhimai	0.1	0.1
Tajpuria	0.1	0
Mali	0.1	0
Others	6.6	1.9
<b>Total</b>	<b>100</b>	<b>100</b>

These eight broad caste/ethnic groups were further collapsed into two broad categories i.e., categories by origin: Non-Madhesi and Madhesi to facilitate further comparison analysis.

Sep. 2014	
Non-Madhesi	64.7
Madhesi	35.3
<b>Total</b>	<b>100</b>

Table 3: Caste/ethnicity of the respondents by origin.

The table below shows the religious composition of the sample of the three waves.

	Population (%)	Sep. 2014
Hinduism	81.3	84.9
Buddhism	9	8.2
Islam	4.4	4.3
Christianity	1.4	1.2
Kirat	3.1	1.4
Atheist	0	0.1
Others	0.8	0
<b>Total</b>	<b>100</b>	<b>100</b>

Table 4: Sample composition by religion

The association of sample by rural and urban settlement of all three waves reflects the actual national figure of 2011 census. Out of total respondents interviewed in three surveys, 83 percent were from rural and 17 percent from urban areas.

	Population (%)	Sep-14
Rural	83	83
Urban	17	17
<b>Total</b>	<b>100</b>	<b>100</b>

Table 5: Sample composition by settlement pattern

The association of sample by rural and urban settlement of all three waves reflects the actual national figure of 2011 census. Out of total respondents interviewed in three surveys, 83 percent were from rural and 17 percent from urban areas.

The table below shows the percentage of men and women as per the census of 2011 and the sample for each of the three waves.

	Population (%)	Sep-14
Female	50.1	49.8
Male	49.9	50.2
Total	100	100

Table 6: Sample composition by sex

The composition of the sample in terms of ecological and development regions directly matches that of the general populations in all three waves. The following table indicate the sample distribution of geographic composition.

	Population (%)	Sep-14
Mountain	6.7	6.7
Hill	43	43.1
Tarai	50.2	50.2
Total	100	100

Table 9: Sample composition by ecological region

	Population (%)	Sep-14
Eastern	21.9	21.9
Central	36.4	36.5
Western	18.6	18.7
Mid-Western	13.3	13.3
Far-Western	9.6	9.6
Total	100	100

Table 10: Sample composition by development region

An overpowering majority of respondents, over 80 percent, were married and one-tenth was unmarried and around 5 percent widow in these three surveys. The disaggregation of the sample by marital status of the respondents is obtainable in the table below.

	Sep-14
Married	86.5
Unmarried	8.1
Widow/widower	4.9
Divorced	0.1
Separated	0.3
Declined	0
Total	100

Table 8: Sample composition by marital status

The various age groups have been collapsed into four broad age-groups. The age composition of the sample is presented below.

	Sep-14
18-25	19.5
26-35	27
36-45	21.6
Above 45	31.9
Total	100

Table 8: Sample composition by age groups

	Sep-13	Feb-14	Sep-14
Yes	29.9	30.3	35.2
No	69	69.7	64.7
Declined	0.2	0	0.1
DK/CS	0.9	0	0
Total	100	100	100

Table 11: Whether or not a family member is outside the country

Between 91 and 94 percent reported having a citizenship certificate.

	Feb-14	Sep-14
Yes	91.4	93.7
No	8.4	6.3
DK/CS	0.2	0
Total	100	100

Table 12: Whether or not people have citizenship certificate

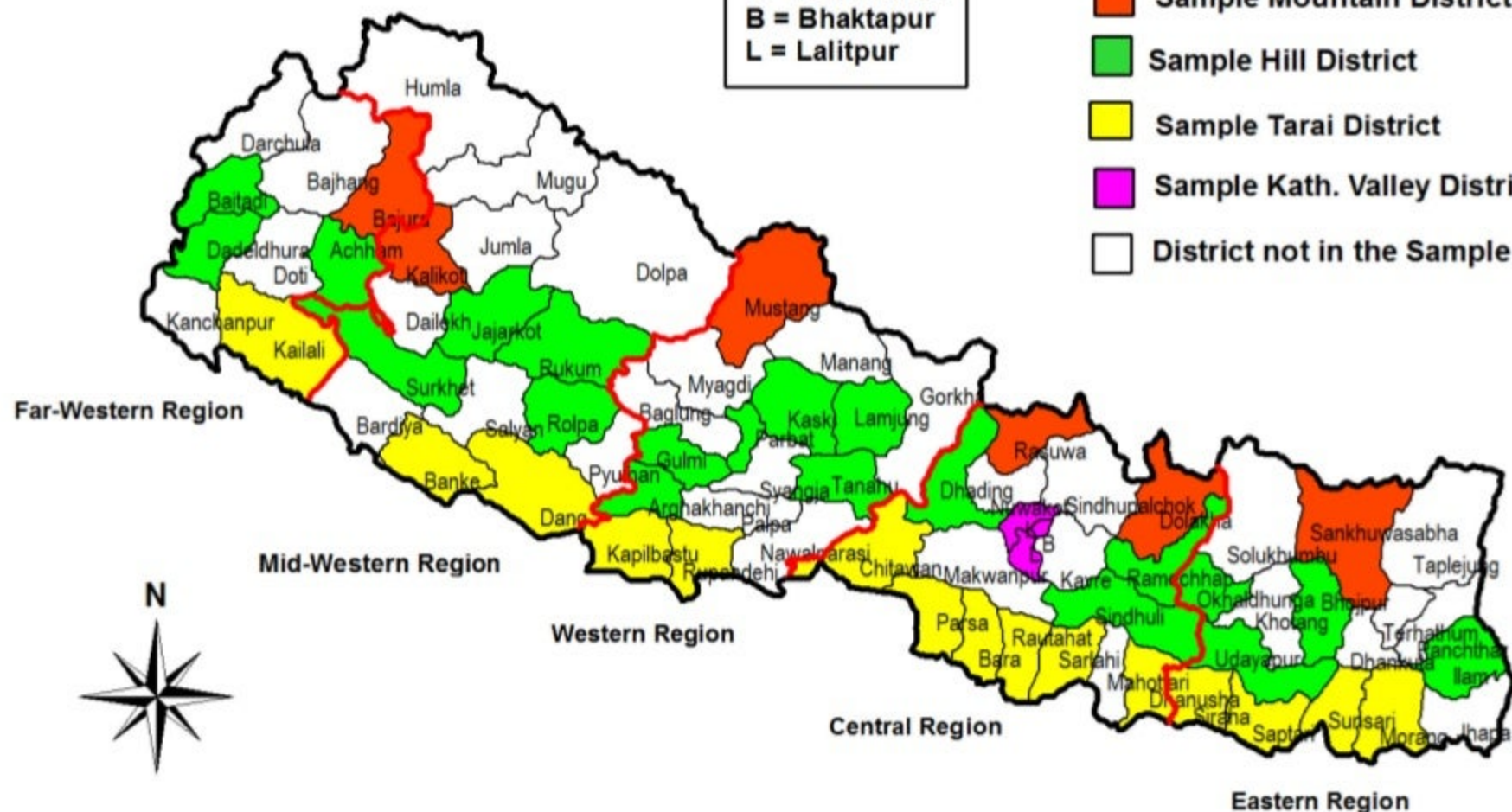


## Wave-III Survey

### Sample Distribution (District Level)

K = Kathmandu  
B = Bhaktapur  
L = Lalitpur

-  Sample Mountain District  
 Sample Hill District  
 Sample Tarai District  
 Sample Kath. Valley District  
 District not in the Sample



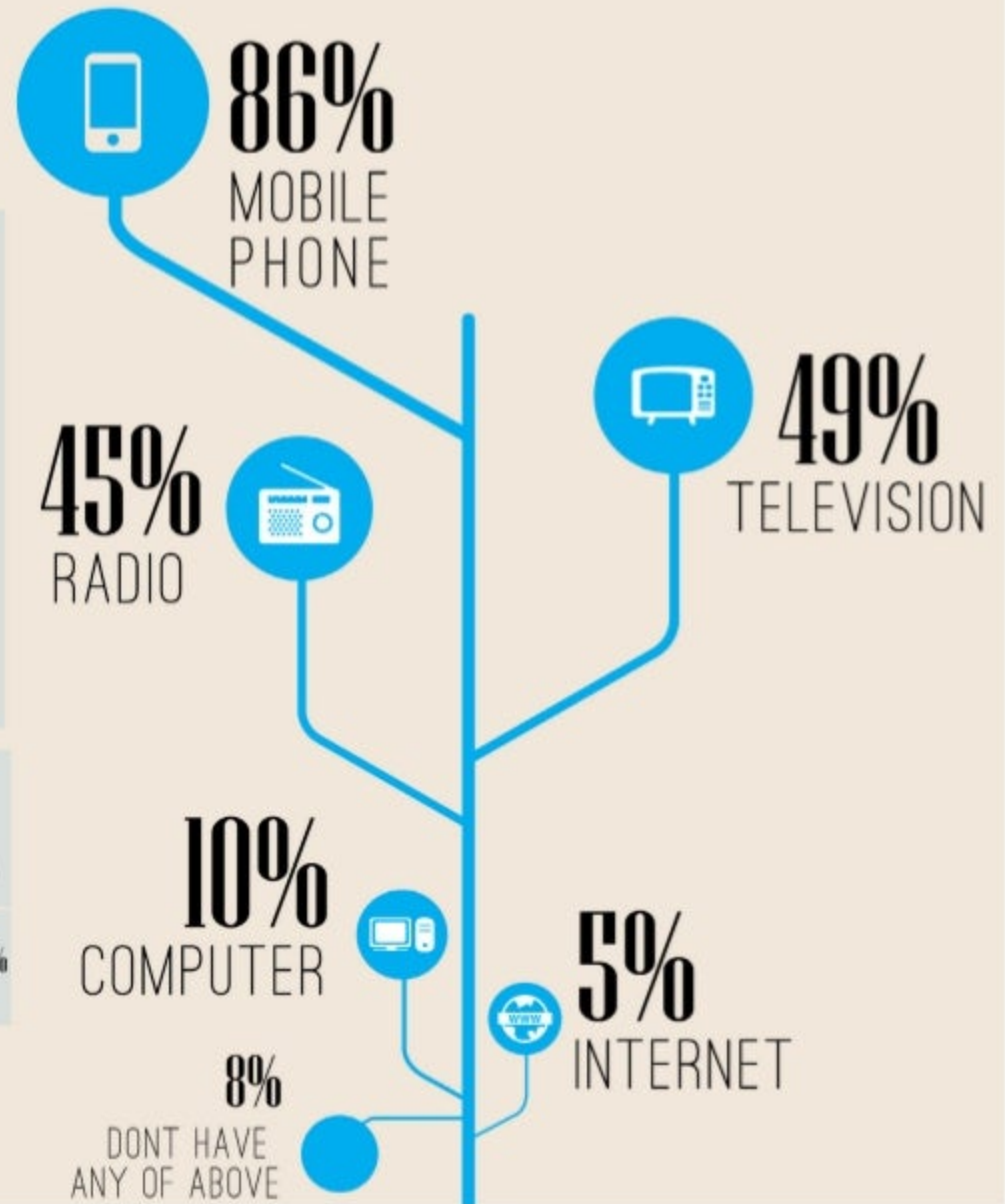
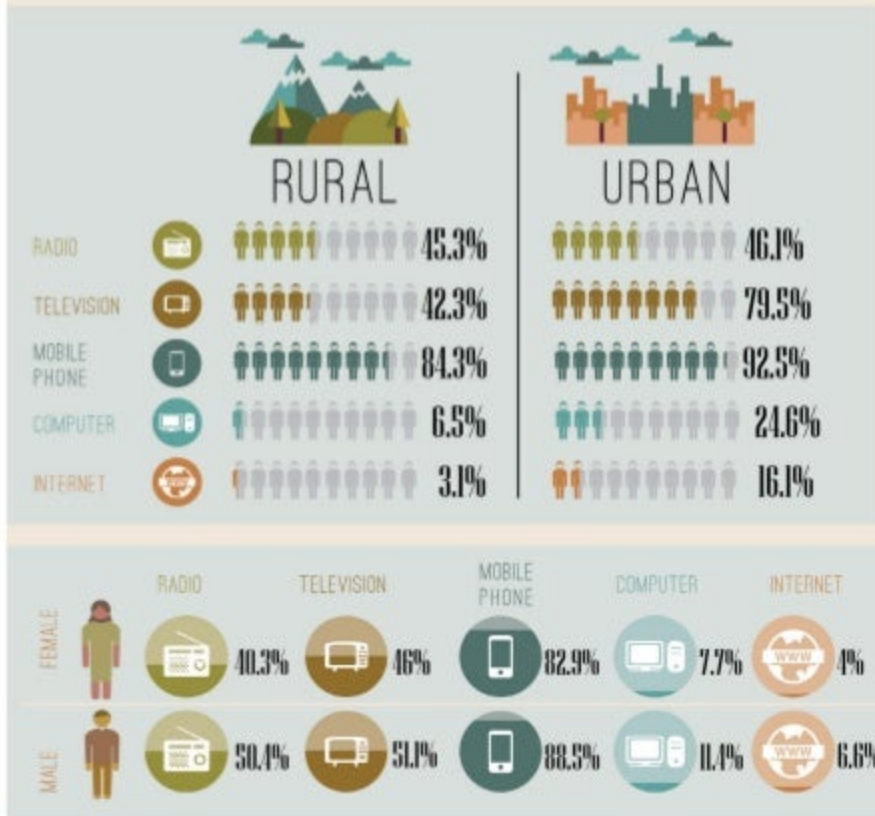
# NEPAL

# Nepal Media Landscape

## February 2014

# WHICH OF THESE DO YOU HAVE WORKING IN YOUR HOUSEHOLD?

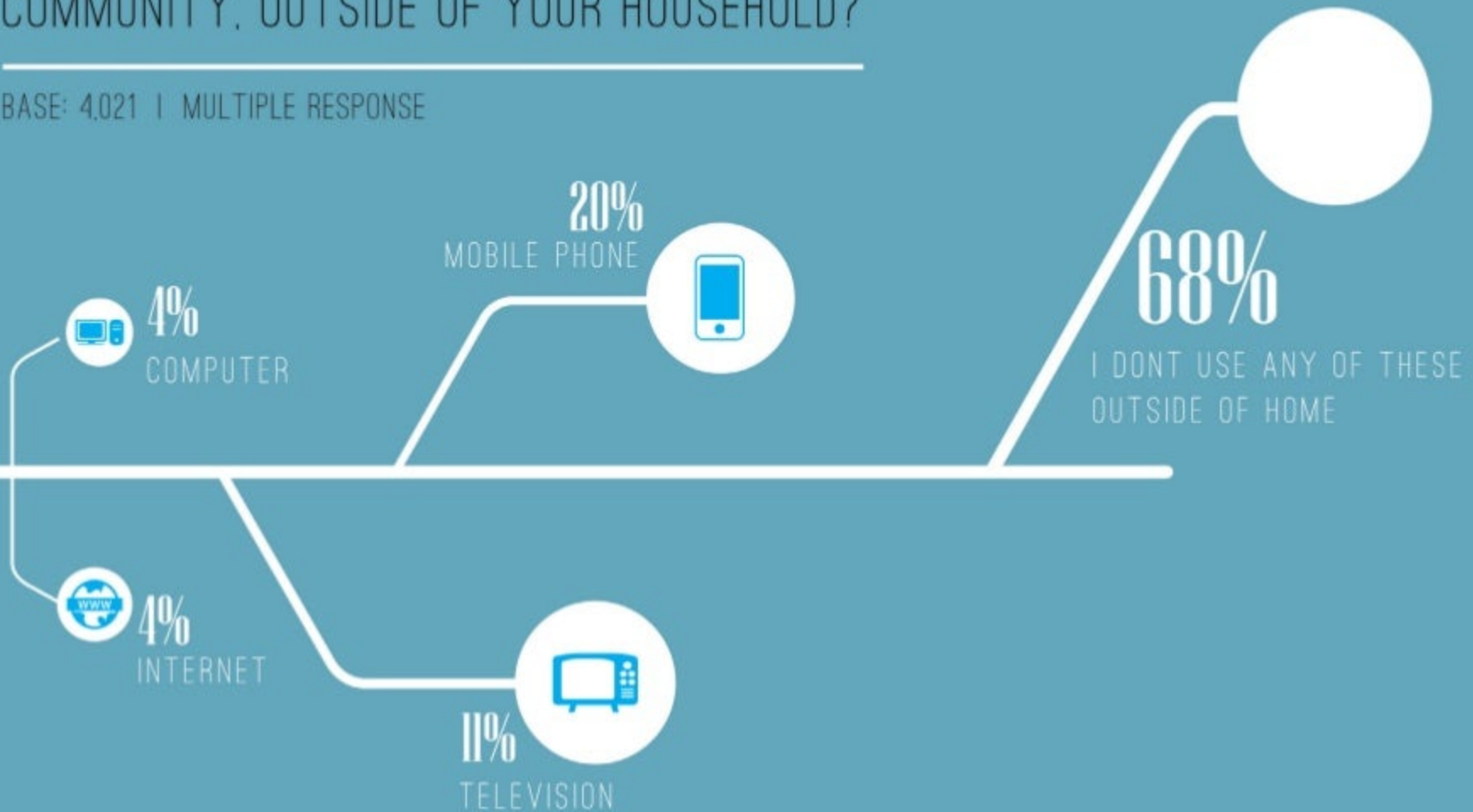
BASE: 4,021 | MULTIPLE RESPONSE





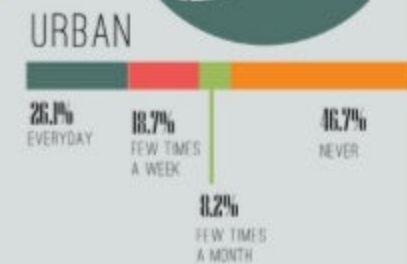
# WHICH OF THESE HAVE REGULAR ACCESS TO (AT LEAST ONCE A WEEK) IN YOUR COMMUNITY, OUTSIDE OF YOUR HOUSEHOLD?

BASE: 4,021 | MULTIPLE RESPONSE



# IN THE PAST SIX MONTHS, HOW OFTEN DID YOU LISTEN TO THE RADIO?

BASE=4,021

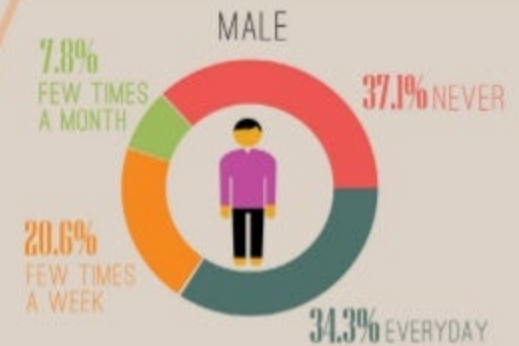
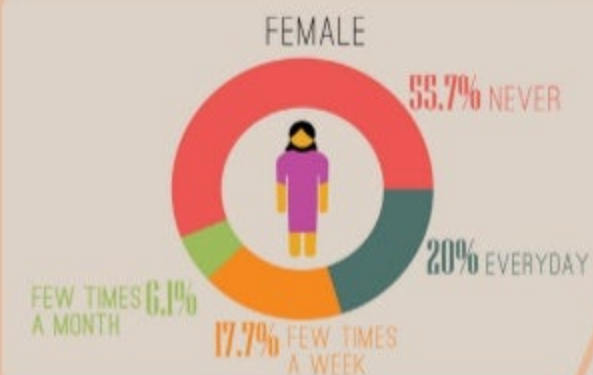


**46% NEVER**

**27% EVERYDAY**

**19% FEW TIMES A WEEK**

**7% FEW TIMES A MONTH**



# WHY DON'T YOU LISTEN TO THE RADIO?

BASE=1,865.

PERCENTAGE BASED ON MULTIPLE RESPONSE

I DO NOT HAVE A RADIO

**79%**



I DO NOT HAVE TIME

**10%**



PROGRAM IN RADIO ARE NOT INTERESTING

**8%**



MY RADIO IS DAMAGED

**6%**



I CANNOT AFFORD RADIO

**5%**



I DONT GO TO PLACES WHERE THEY PLAY THE RADIO

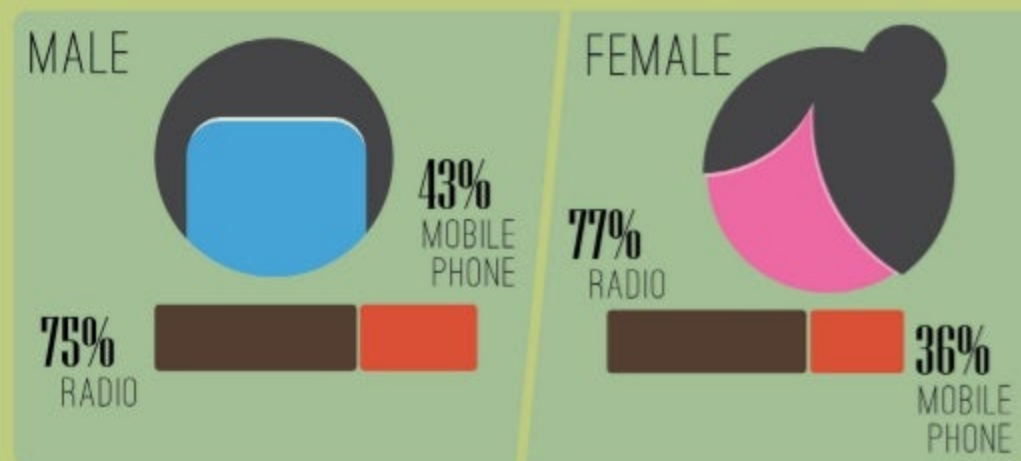
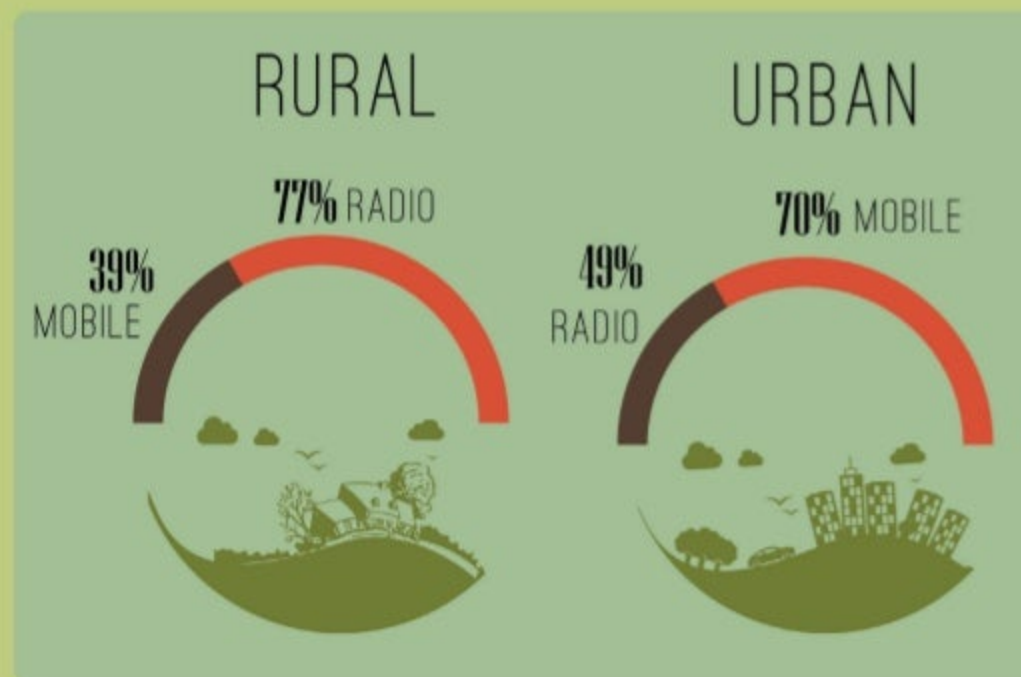
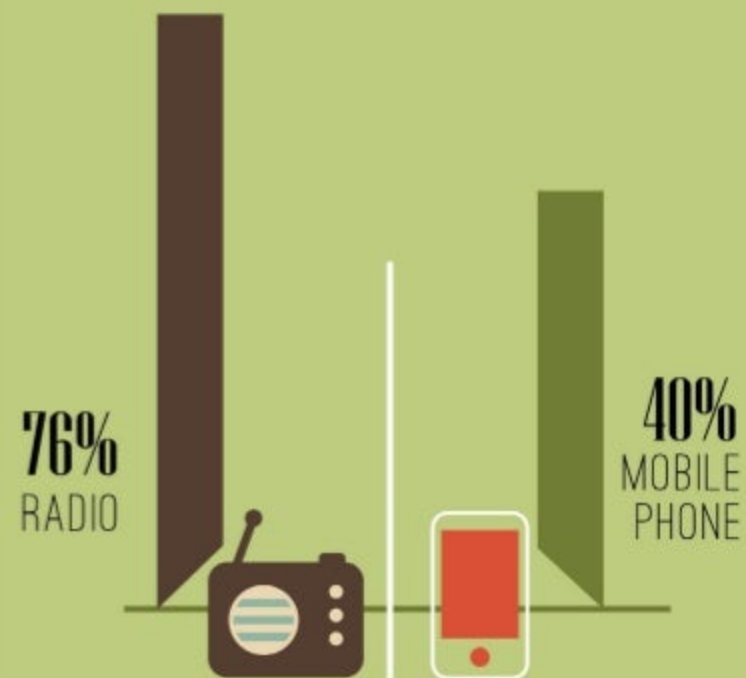
**1%**





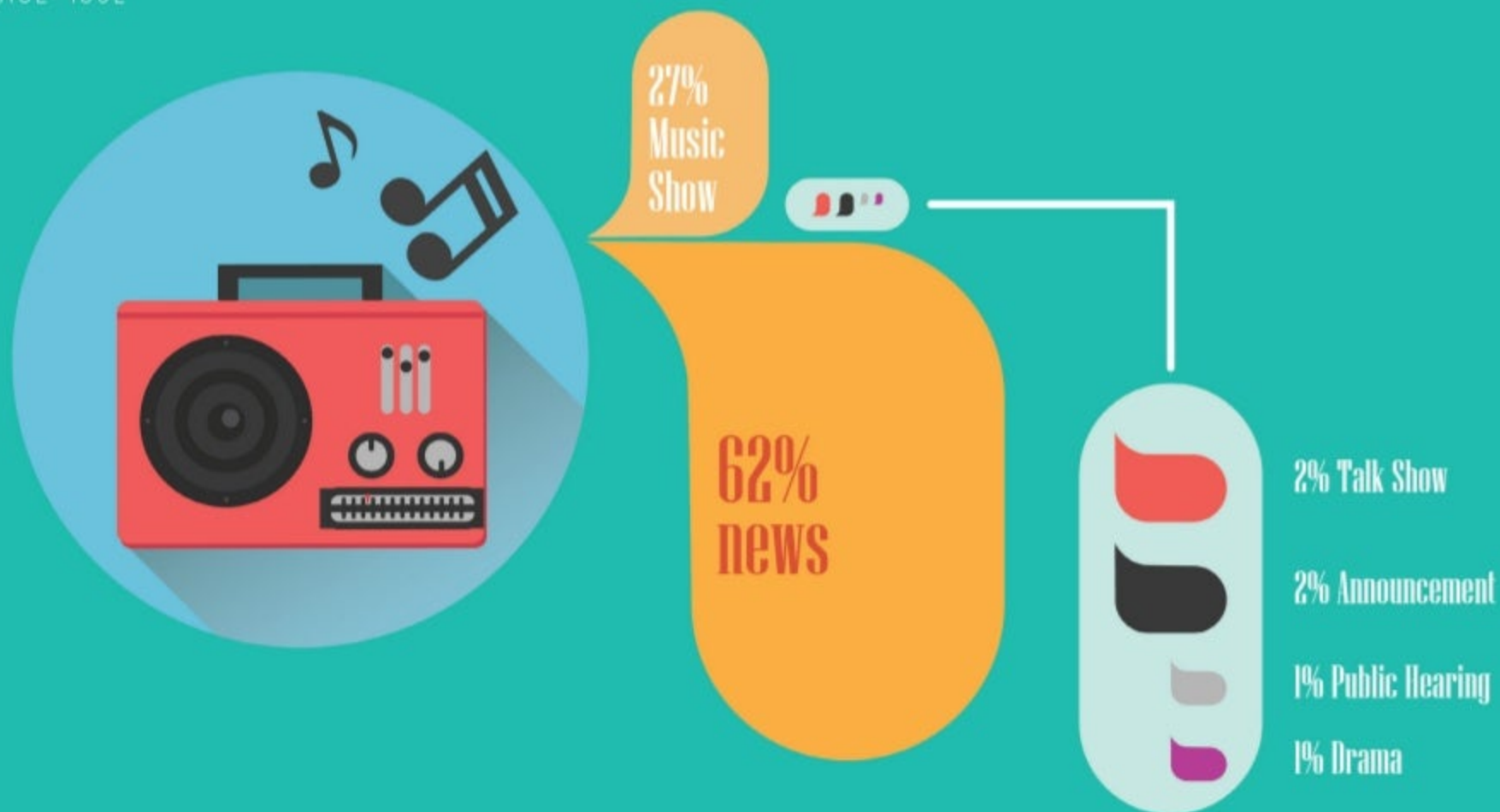
# ON WHAT DEVICE DO YOU LISTEN TO THE RADIO?

BASE= 2,144. MULTIPLE RESPONSE



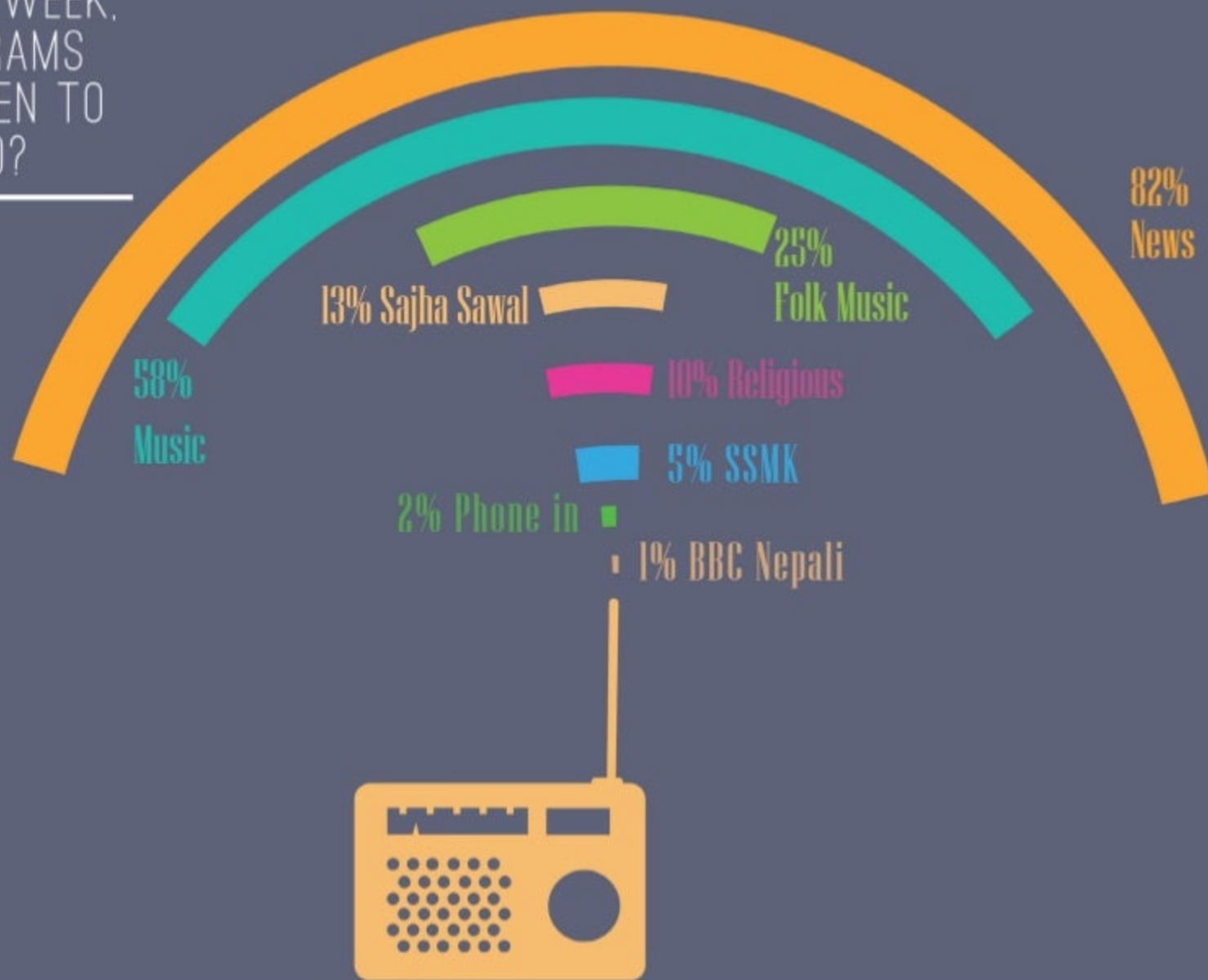
# WHAT TYPES OF PROGRAM DO YOU LIKE THE MOST IN THE RADIO

BASE=1852



# IN THE PAST WEEK, WHICH PROGRAMS DID YOU LISTEN TO ON THE RADIO?

BASE=1852





# WHICH TIME OF THE DAY DO YOU LISTEN TO THE RADIO FOR NEWS?

BASE = 1958. MULTIPLE RESPONSES



MOUNTAIN



6AM - 9AM



6PM - 9PM



HILL



6AM - 9AM



6PM - 9PM



TERAI



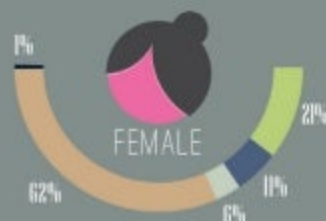
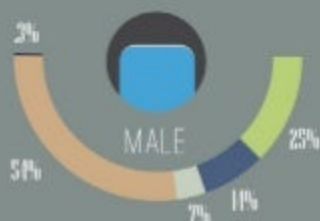
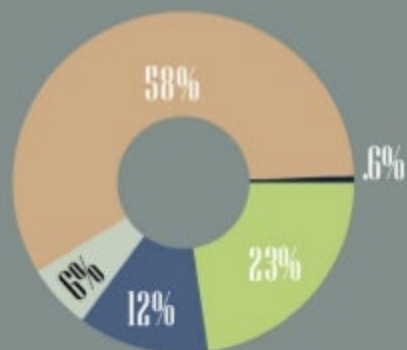
6AM - 9AM



6PM - 9PM

# IN THE PAST SIX MONTHS, HOW OFTEN DID YOU WATCH THE NEPALI TV CHANNEL?

BASE= 4,021



● NEVER   
 ● FEW TIMES A MONTH   
 ● FEW TIMES A WEEK   
 ● EVERY DAY   
 ● DONT KNOW



## URBAN



## RURAL



# POPULARITY OF TELEVISION PROGRAM



26%  
TELESERIALS

1%  
PUBLIC HEARING

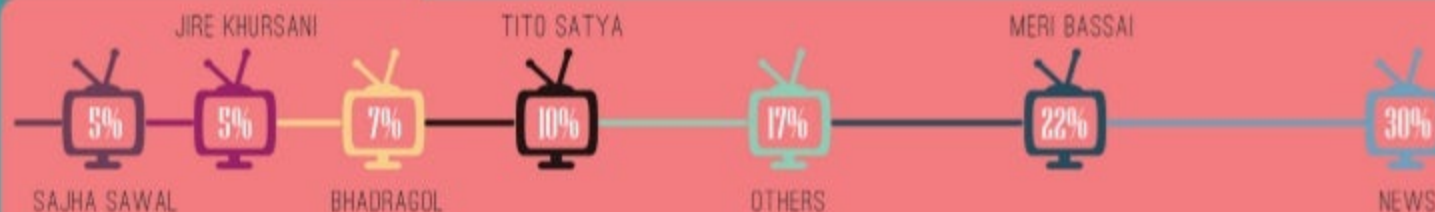
45%  
NEWS

7%  
MUSIC SHOW

4%  
TALK SHOWS

13%  
DONT KNOW

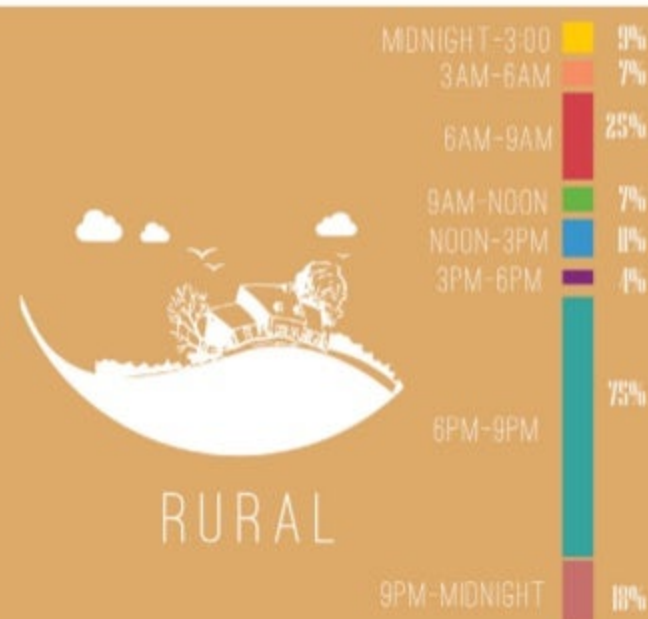
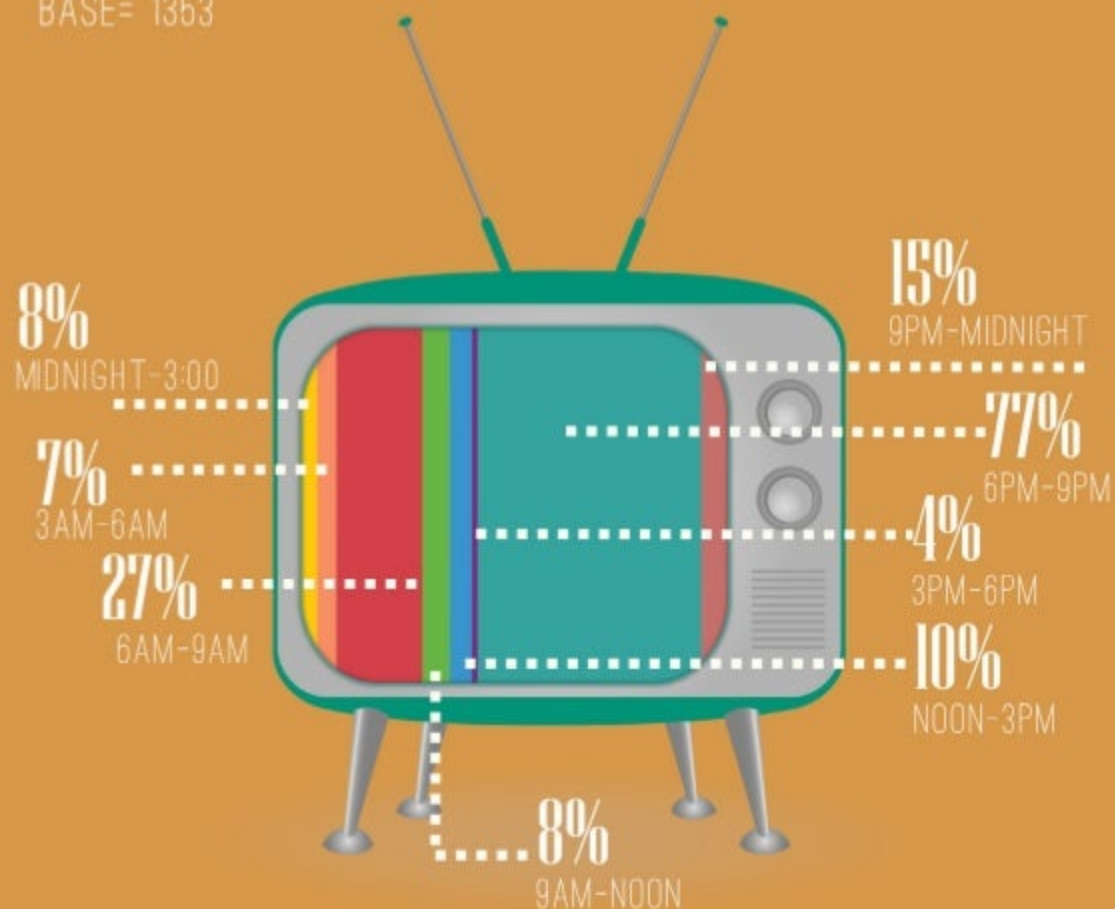
WHICH IS YOUR FAVOURITE TV PROGRAM? (BASE = 1112)





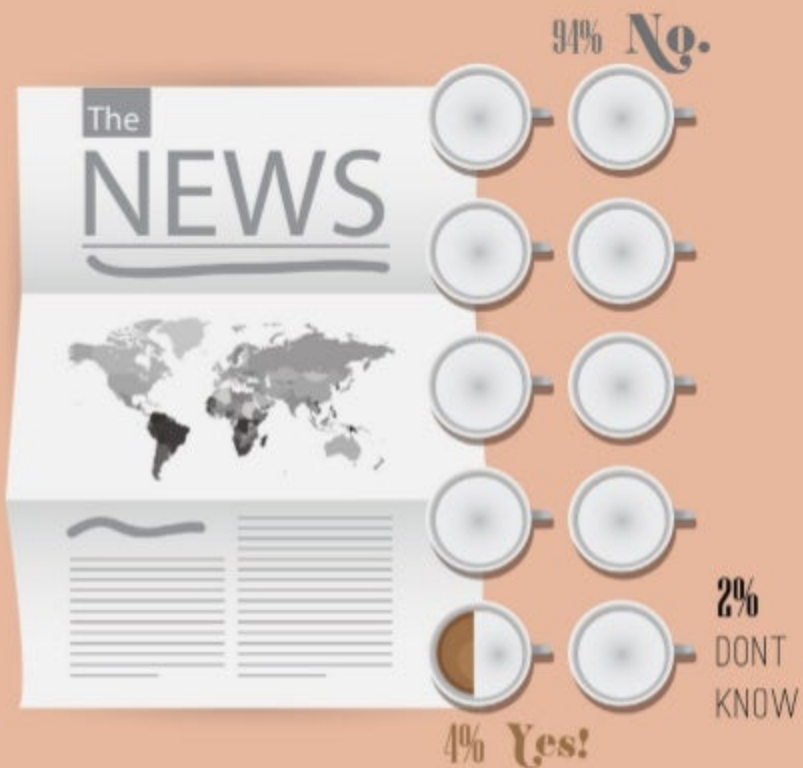
# WHICH TIME OF THE DAY DO YOU WATCH TV FOR NEWS?

BASE= 1353

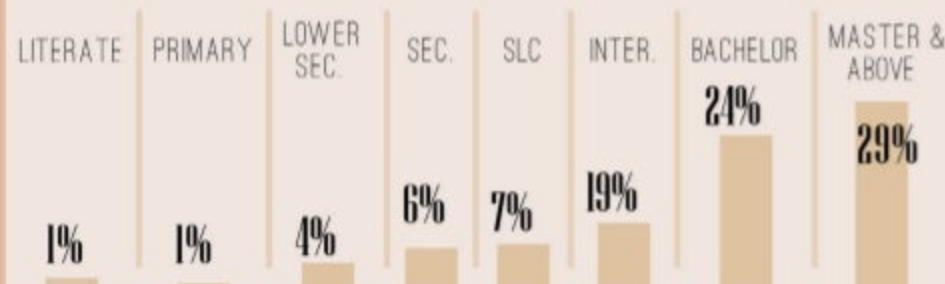


# DO YOU SUBSCRIBE ANY NEWSPAPER?

BASE= 4,021

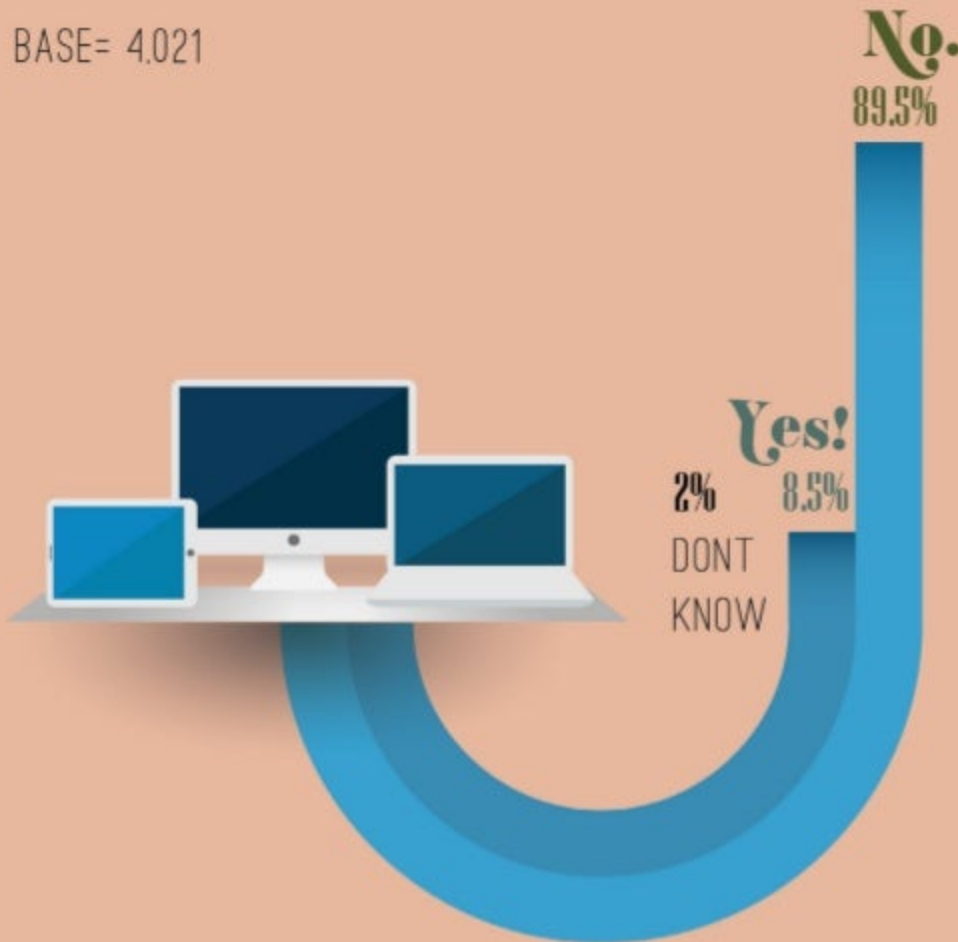


## EDUCATION



# DO YOU OWN A COMPUTER OR LAPTOP OR TABLET (IN FUNCTIONING ORDER)?

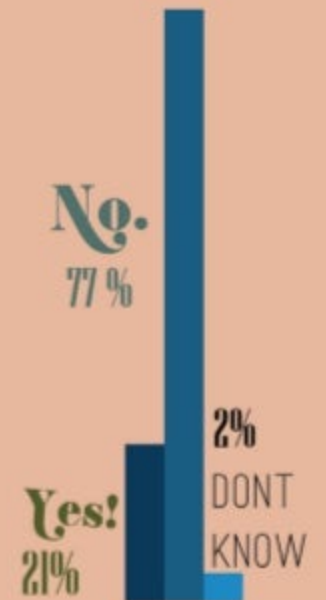
BASE= 4.021



## RURAL



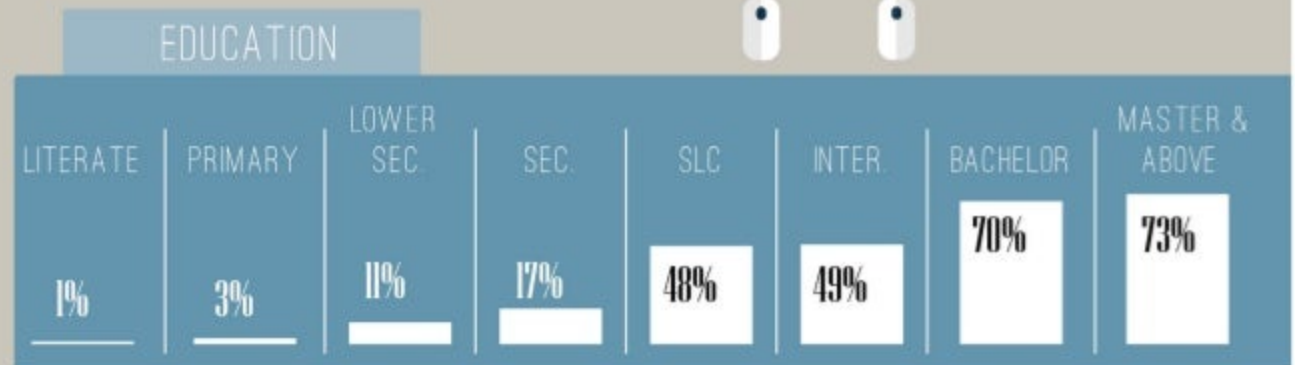
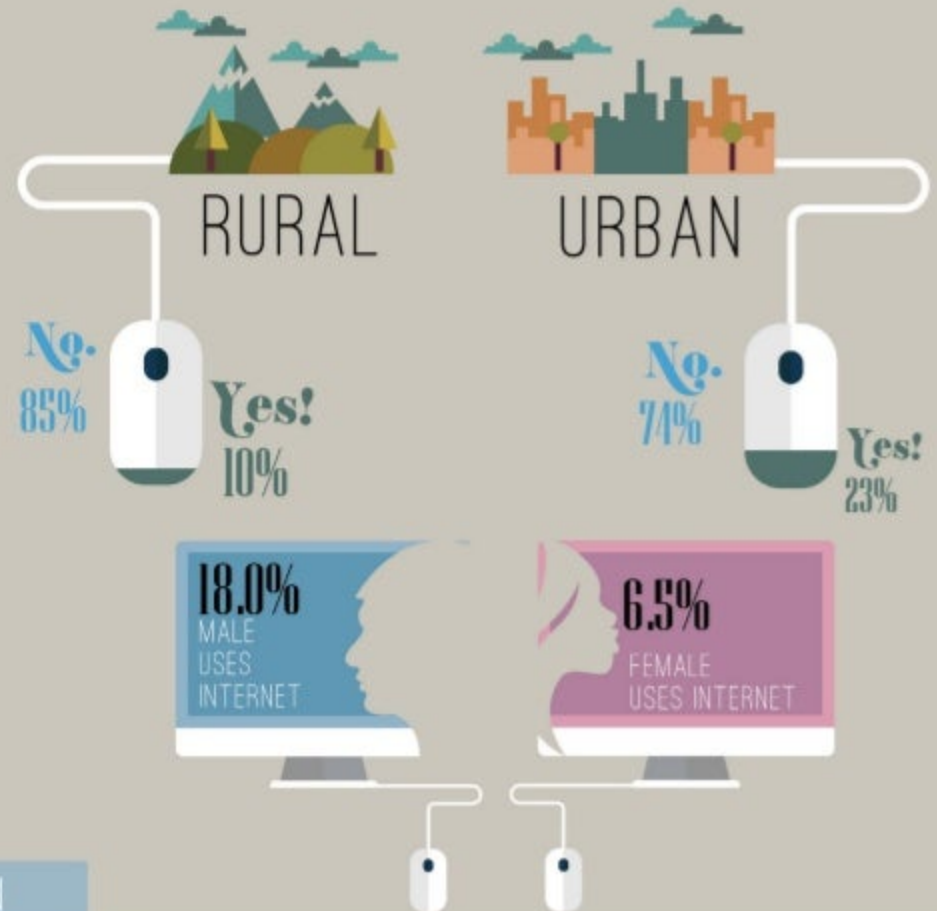
## URBAN





# DO YOU USE THE INTERNET?

BASE= 4,021



# HOW DO YOU ACCESS THE INTERNET?

BASE= 493



9% ON MY OFFICE COMPUTER/LAPTOP

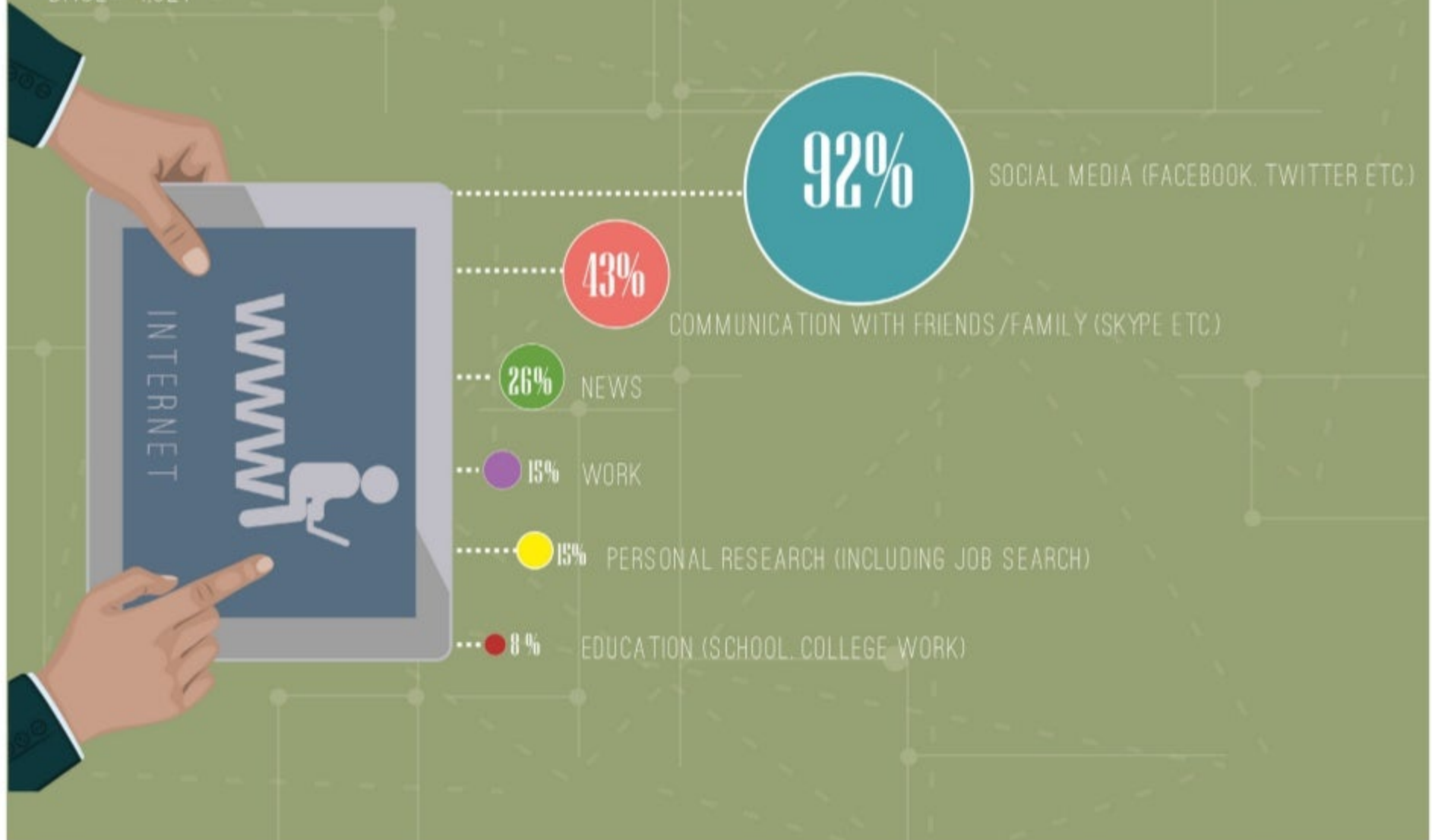
10% IN A CYBER

24% ON MY HOME COMPUTER/LAPTOP

88% ON MY MOBILE PHONE

# WHAT DO YOU USE THE INTERNET FOR?

BASE= 4.021





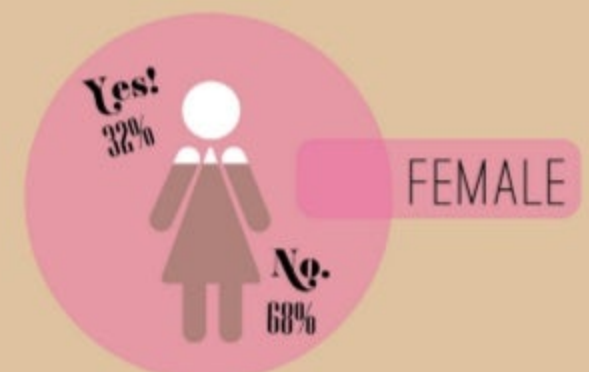
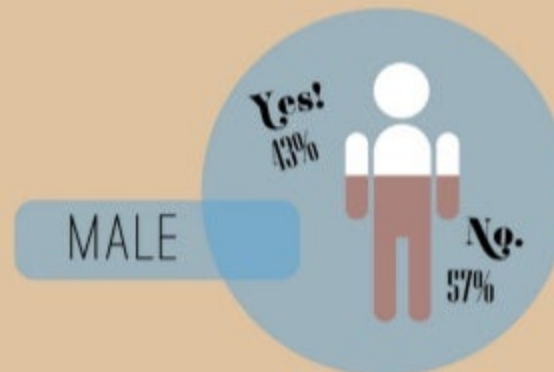
# DO YOU OWN A MOBILE PHONE?

BASE=4021



## IS YOUR MOBILE PHONE A SMART PHONE?

BASE=2875



# HOW TRUST WORTHY ARE THESE MEDIA?

BASE = 1958, MULTIPLE RESPONSES

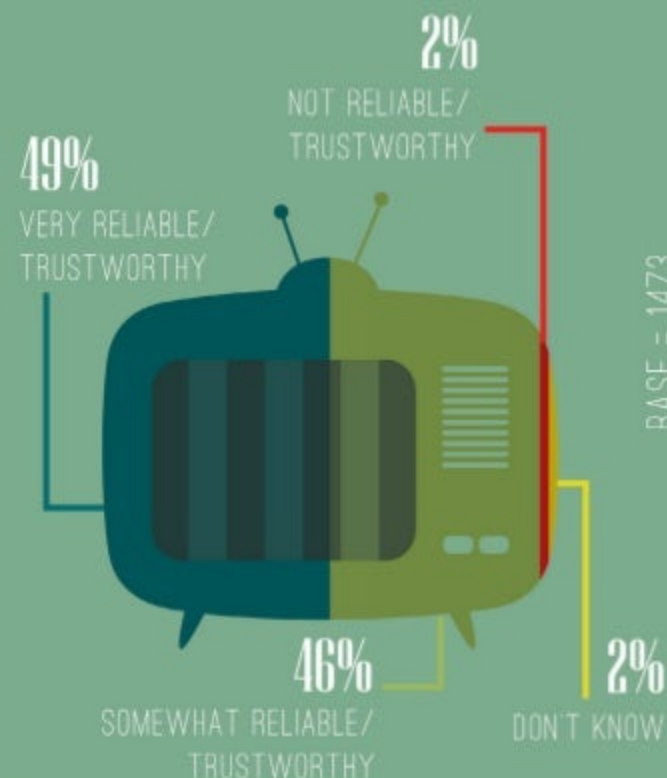
## NEWSPAPER

BASE = 4021



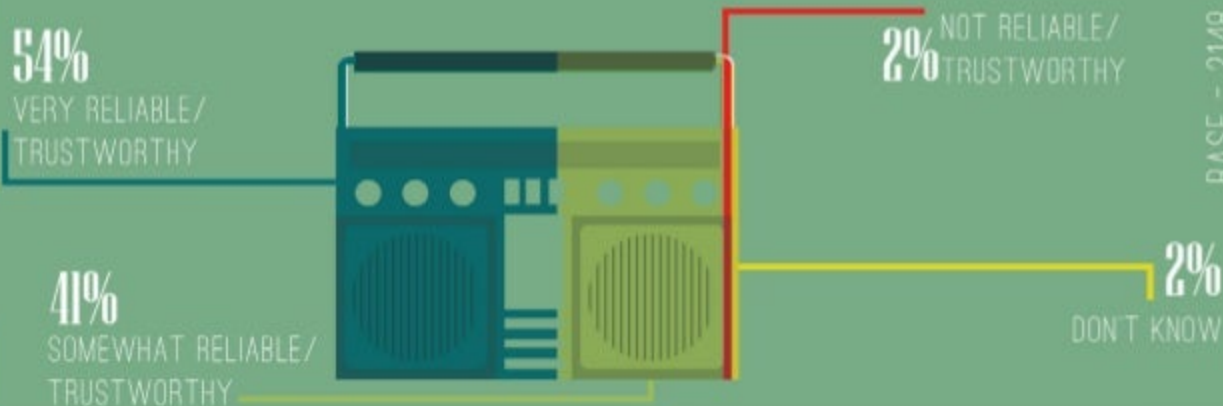
## TELEVISION

BASE = 1473



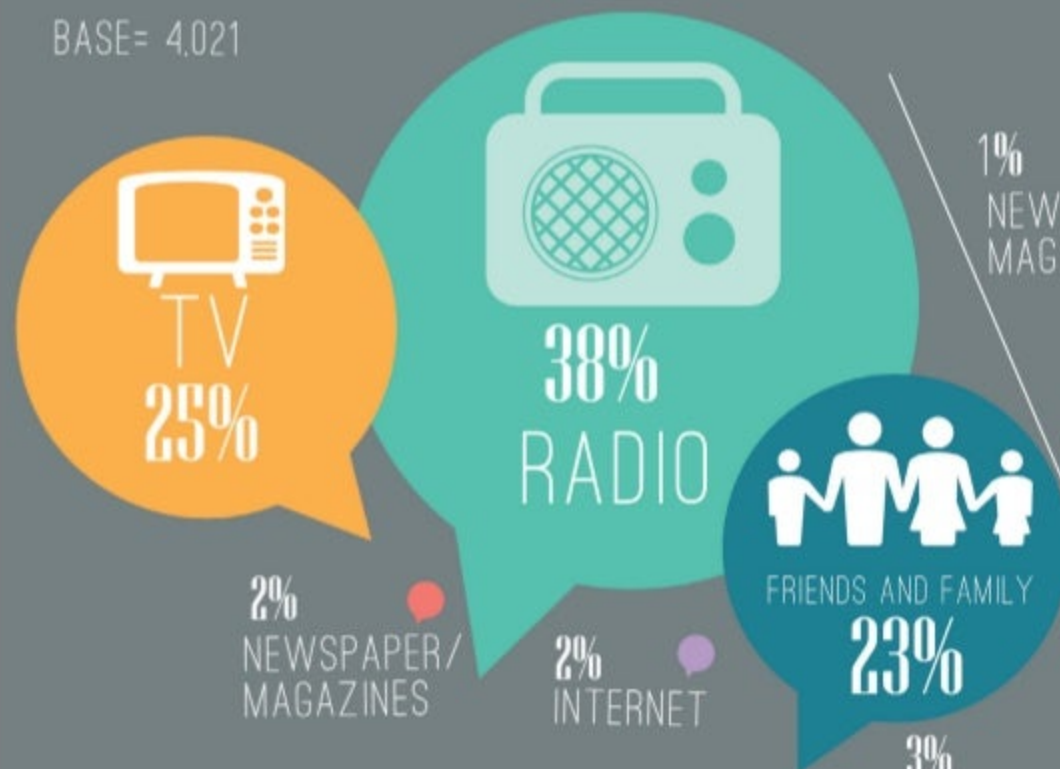
## RADIO

BASE = 2148

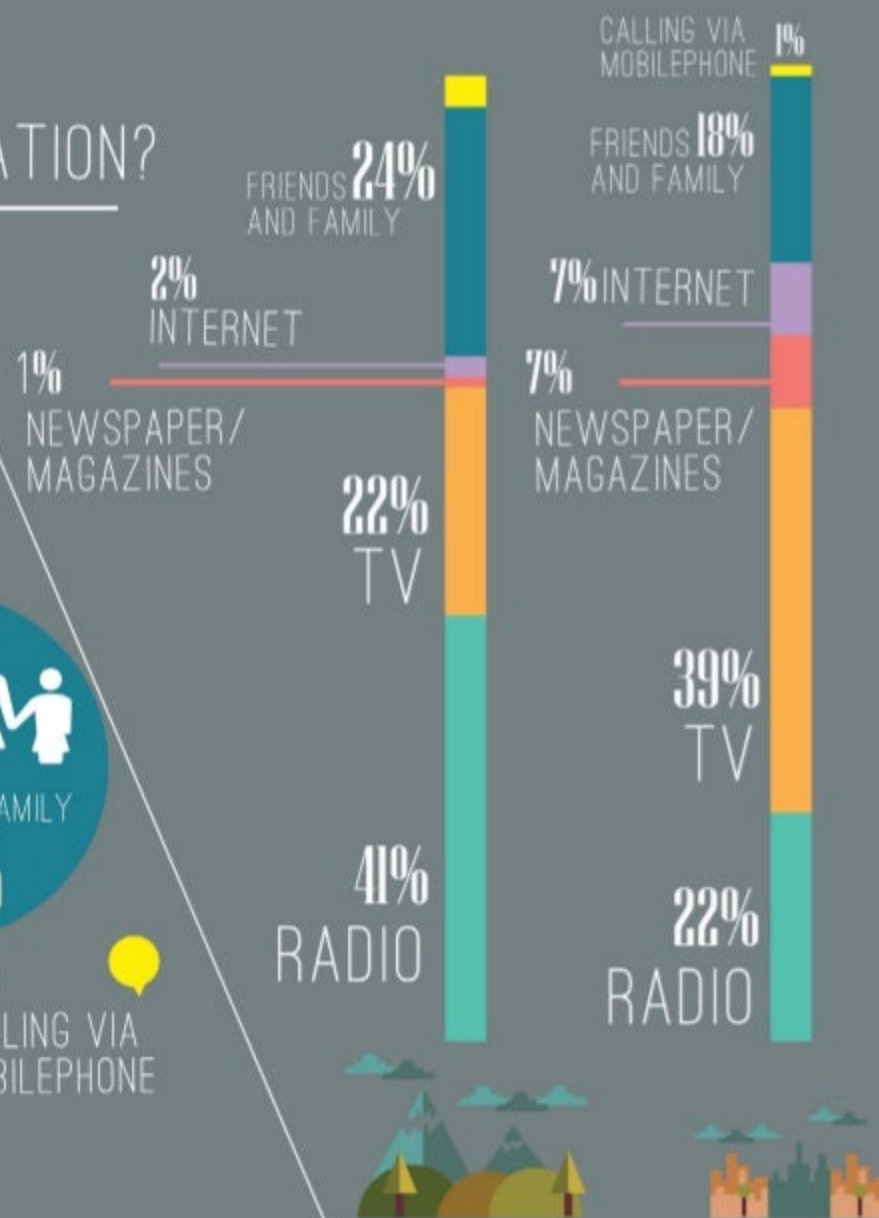


# WHAT IS YOUR PREFERRED MEDIUM FOR OBTAINING NEWS AND INFORMATION?

BASE= 4.021



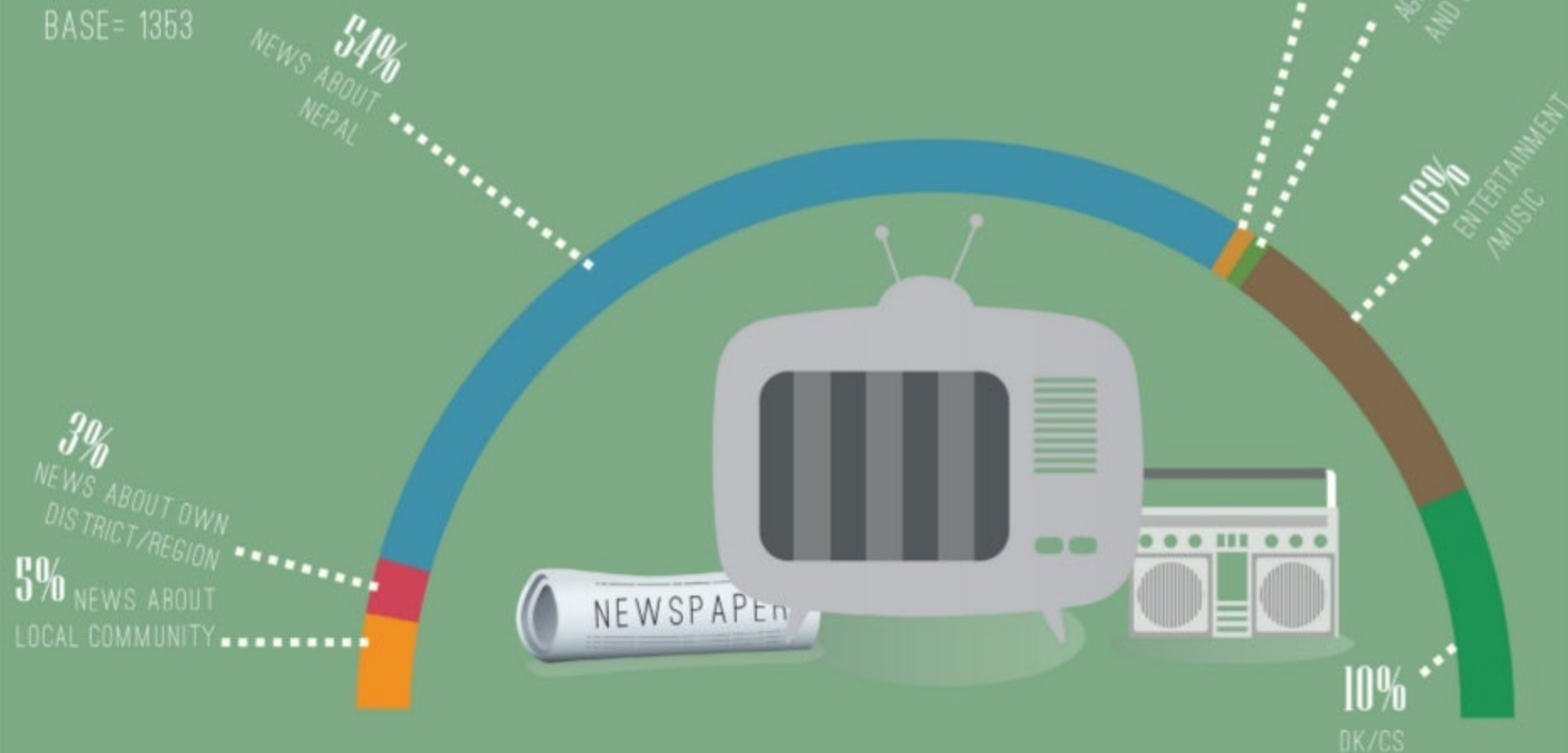
# NEWS





# WHAT IS THE MOST IMPORTANT TOPIC YOU WOULD LIKE TO LISTEN/WATCH/READ ON THE RADIO/TV/ NEWSPAPERS??

BASE= 1353

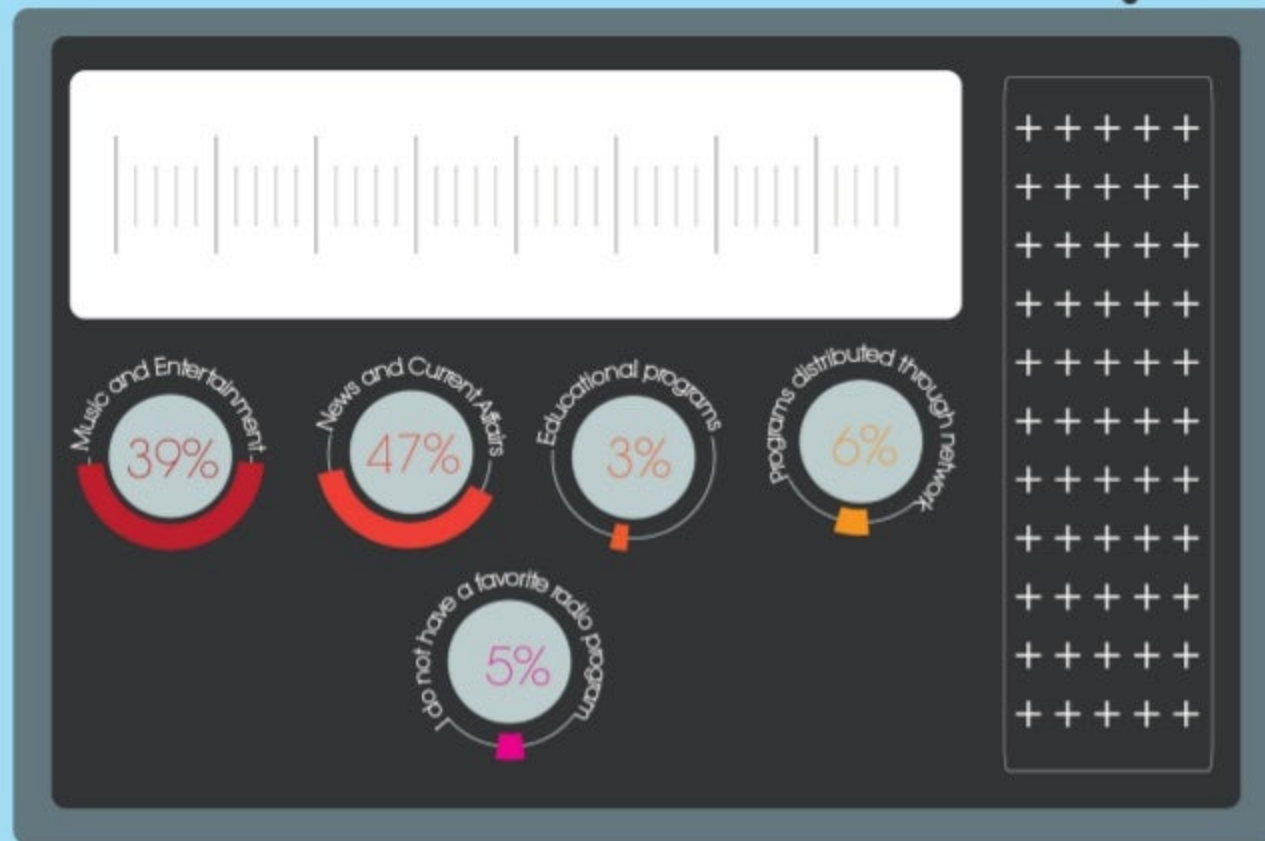


# Nepal Media Landscape

## September 2013

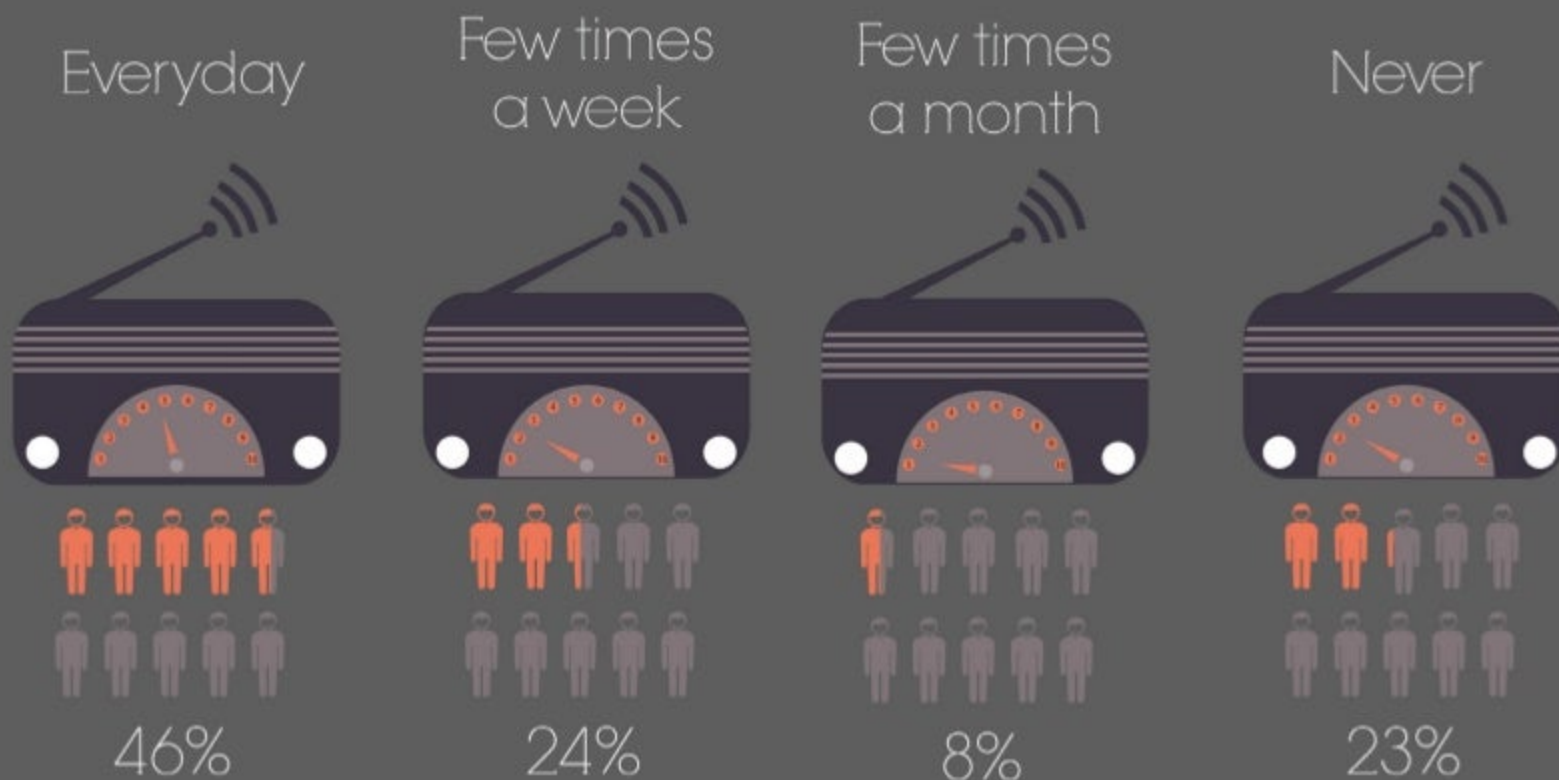
# What is your favorite radio program?

Base 2319





# Access to Radio



# Access to Newspaper

Everyday



9%

Few times  
a week



11%

Few times  
a month



10%

Never



70%

# Access to Television

Everyday



32%

Few times  
a week



15%

Few times  
a month



8%

Never



23%

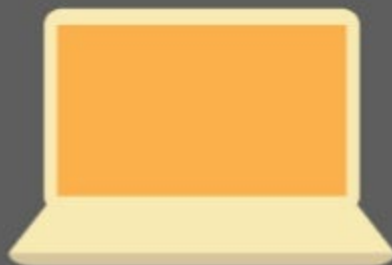
# Access to Internet

Everyday



7%

Few times  
a week



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Few times  
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