

MEDIA IN INDIA: Access, Practices, Concerns and Effects

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Published by

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Cover Photo:

Designed & Printed by

FACET Design

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SPECIAL THANKS

We would like to express our special gratitude to Aasim Khan (Assistant Professor at the Department of Social Sciences and Humanities, Indraprastha Institute of Information Technology-Delhi), Joyojeet Pal (Associate Professor at the School of Information at the University of Michigan, Ann Arbor), Ralph Schroeder (Professor at Oxford Internet Institute, University of Oxford), Sahana Udupa (Professor of Media Anthropology at Ludwig-Maximilians-Universität, Munich) and Taberez Neyazi (Assistant Professor & Director of Digital Campaign Asia Project at the Department of Communications and New Media, National University

of Singapore) for providing their expert feedback on the draft questionnaire for the survey that was shared with them for review. We found their comments and suggestions to be extremely useful and implemented and incorporated many of them in the final revised questionnaire.

Our special thanks also go to Adrian Haack (Director of Konrad Adenauer Stiftung Office, India), Peter Max Rimmele (Former Resident Representative of Konrad-Adenauer-Stiftung Office, India) and Pankaj Madan (Team leader, Programme Coordination of Konrad-Adenauer-Stiftung Office, India) for making this project possible.

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INTRODUCTION

There can be no denying that the Media, in its traditional, new and evolving forms, increasingly plays a crucial role in our day to day lives shaping our behaviour, attitudes and preferences. Its presence has become so ubiquitous and its quantity and variety so overwhelming that it could be argued that it has become very difficult for even the most reclusive and disconnected person to be left untouched by its impact in some way or the other. It won't be an exaggeration to say that the media in its various forms today permeates our cultures, societies, politics and our very bodies. Long gone are the days when conventional media such as radio, newspapers and television constituted our only sources of knowledge and entertainment. The digitization of the physical world, the penetration of the internet, the proliferation of social media platforms and streaming services, and the greater availability of budget-friendly smartphones and affordable data plans, has meant that the last decade, especially the last four to five years, have seen an explosion in the number of media choices that are available to consumers to entertain and inform themselves and to interact with others. So diverse and continuously evolving is the array of media options now that even relatively newer terms such as multi-media, new media, alternative media, social media and even digital media fail to adequately capture the present media moment.

While this rapid and dramatic transformation in the media landscape or 'mediascape' is of course a worldwide phenomenon and not restricted to any

particular country as such, the sheer size of India's population and market coupled with its religious and linguistic diversity, have made the story of growth of different forms of media even more remarkable and urgent in the case of India. This story has been both, good and bad, empowering and restrictive, at the same time.

On the bright side the media in India, be it old or new media, has become an instrument and site of free expression, innovation, sharing of ideas, interconnectedness and an accommodation of diversity through the regionalization of content. The world's most populous democracy has in fact bucked the global trend of a decline in conventional media sources, since parallel to the rise of online and digital media there has also been an exponential growth in the number of print publications and television channels. The Indian market has thus been able to accommodate the old with the new.

On the dark side however, even as media quantity increases in India, there is a major crisis of credibility, quality and ethics as the race to grab eyeballs and advertising revenue has resulted in a 'dumbing down' of content. Not only that, the media in India has also become a tool of certain vested interests to spread divisive propaganda, hate and disinformation resulting in a serious blow to the country's social fabric. Furthermore, the Indian media is an arena that is seeing an enormous amount of corporate and government control as ruling parties and business corporations (in whose

hands media ownership is increasingly concentrated) have been accused of working in tandem to subtly and sometimes directly pressure media outlets to produce favorable coverage and set agendas that suit their political and economic interests and target the political opposition. Not only is this 'media capture' resulting in the compromising of content, it is also creating an environment of self-censorship by journalists, media persons and users who fear government retribution for expressing their opinions. Increasing state and corporate surveillance of people's media-related activities, be they on phone or online, without any strong legal framework to protect their privacy, is another major concern.

Also of concern is the gradual cooption of internet and social media giants who are looking to expand their presence in the burgeoning Indian market and thus need the government's help. These digital behemoths have been accused of bending to the diktats of the authorities to improve their business prospects (although of late there has been some resistance shown by some platforms) and of using their algorithms to make decisions about what kind of news and information reaches the public.

Thus the media in India and in many other parts of the world, particularly in countries that have authoritarian populist regimes, works today as a double-edged sword producing both favorable and unfavorable consequences – on the one hand it empowers and gives voice to many hitherto marginalized sections, but on the other it also controls and endangers the lives of many others.

It is also important to stress here that the Covid-19 pandemic and

the resultant lockdowns have only accelerated the trend of media ubiquity and surveillance, as people's dependence on various media platforms and digital applications as sources of information and entertainment have only increased further in these times of isolation. Covid-19 has also brought to the fore the issue of 'digital divide' or the unequal access of internet and information and communication technologies.

In the context of this media pervasiveness and its good, bad and ugly implications for our society and democracy as briefly outlined above, the Lokniti programme of the Centre for the Study of Developing Societies undertook a comprehensive India-wide study of media consumption behaviour in India, perhaps the first of its kind in the country, to understand people's day to day media practices and their media-related concerns and attitudes. Since the media in its varied forms can no longer be viewed as a single structure that produces uniform 'media effects', we studied both traditional and new practices. Our survey-based studies over the last two decades in fact show that older forms of media, although declining in usage, continue to command a very large share of the market and thus still wield immense influence.

The study was conducted in 19 States in the month of January 2022 among over 7,400 citizens aged 15 years and above (see Methodology section to know the details). Unlike the many other media consumption surveys/ studies nowadays that are either conducted only among city-dwellers or only among internet users, this study is based on a nationally representative and all-encompassing survey covering all segments of the society – the rural as well as the urban citizens, the rich

and the poor, the young and the old, men and women, and the non-literate as well as the educated. Moreover, it is not just limited to those who use internet and smartphones but captures the experiences and perceptions of even those who do not yet have access to them.

This report has seven sections highlighting some of the key findings that emerged from the survey. Section 1 showcases the findings related to access to various media (television, newspapers, mobile phones, broadband internet etc.) by Indian homes. The idea is to offer a reality check on media access (particularly the unevenness of it) at the broad household level right at the outset. Section 2 shares the findings on media consumption and practices at the individual level with a focus on television, newspapers, radio and mobile phones. Section 3 details the trends and patterns related to usage of various social media and messaging platforms

by Indians. Section 4 highlights people's apprehensions related to new media – their concerns regarding fake news and misinformation and their anxiety with respect to invasion of privacy while using the internet and social media, as well as about growing surveillance and tracking of internet and phone activities. Section 5 focuses on people's engagement with news. It looks at their primary source for obtaining news and the extent to which they consume of different types of news media such as news channels and newspapers. It also highlights the results of survey questions that attempted to understand people's news preferences. Section 6 is about people's trust in the news media and their opinions on news media freedom, news media coverage and news media's political neutrality. Finally, Section 7 is on the effects, if any, that media consumption is having on political choices and whether the BJP continues to have the media advantage that it once did.

METHODOLOGY

The findings presented in this report are based on sample survey of 7463 Indian citizens aged 15 years and above. The survey took place in January 2022 in 19 States and Union Territories of India - Andhra Pradesh, Assam, Bihar, Chhattisgarh, Delhi, Gujarat, Haryana, Jharkhand, Karnataka, Kerala, Madhya Pradesh, Maharashtra, Odisha, Punjab, Rajasthan, Tamil Nadu, Telangana, Uttar Pradesh and West Bengal.

We decided to adopt the multi-stage sampling method to select the sample(s). First, a certain number of assembly constituencies were to be sampled in each State based on the State's share in the total sample, then a fixed number of polling stations within each of those assembly constituencies, and finally a fixed number of electors/people from the electoral rolls of each of those polling stations. It was also decided that in each sampled assembly constituency 60 interviews would be conducted and overall 7560 interviews (a number divisible by 60) would be targeted at the national level.

Since we wanted the sample to be nationally representative, we started the sampling process by determining what the share of each State was going to be in the targeted sample. This was done by listing out the 15+ population of all the States (according to Census 2011) and then calculating the percentage share of each State in the total combined 15+ population of all 19 States. Once we knew the sample share of each State, we made some modest increases to the sample share of the smaller states such as Assam, Chhattisgarh, Haryana,

Jharkhand etc. in order to ensure that we end up achieving a sample of at least 240 respondents from them. This would allow us to do state-wise analysis of certain questions, if the need arose. The hikes/adjustments were made by slightly reducing the quota of the larger States such as Bihar, Maharashtra, Tamil Nadu, Uttar Pradesh and West Bengal.

After having made the adjustments and arrived at the sample share/target of each State, we then determined the number of assembly constituencies where the survey would be conducted in each State. This was done by dividing the sample target of each State by 60.

Once the number of assembly constituencies for every State was decided, we went on to employ the systematic random sampling method in 3 steps/stages.

- Step 1 involved the selection assembly constituencies for each State using systematic random sampling with probability proportional to size. The sampling frame for each State was the list of assembly constituencies of that State arranged in accordance with their serial numbers.
- Step2 involved the selection of five polling stations within each of the sampled assembly constituencies. This selection was done at fixed intervals throughout the sampling frame (list of polling stations arranged in serial number) after a random start.
- Step 3 involved the selection of 24

electors/people from the electoral roll of each of the sampled polling stations. This too was also done at fixed intervals following a random start. Of the 24 elector names that were sampled, interviews of 11 people were to be conducted by the field investigators/survey personnel. Apart from this, the field investigators were also asked to conduct one interview of a 15-17 year-old resident of that polling station by approaching any household (other than the ones they had already been to). Hence, overall, 12 interviews were to be conducted at each polling station.

were done in the face-to face mode following proper physical distancing and masks rules. They were conducted by the field investigators on their personal smartphones using a specially designed application that was linked to a server. This meant that the fieldwork monitoring and data checking happened in real time, as the survey happened. Generally an average interview took about 20 minutes to conduct. Before going to the field, field investigators were given training about the survey method, interviewing techniques and about how the smartphone application was to be used.

The questionnaire designed for the survey was a standardized semi-structured one and was translated to the main spoken language of each State. For instance for Kerala, it was translated to Malayalam, for West Bengal to Bengali and for Punjab to Punjabi.

For analysis of the survey data, the achieved sample (raw sample) was weighted by the population proportion of each State in the total 15+ population of the 19 States, and by the share of key demographics – gender (men, women), religion (Hindu, Muslim, Christian, Sikh), locality (rural, urban), and caste group (Scheduled Caste, Scheduled Tribe) - in the total population of the 19 States based on Census 2011 data. All analysis in the report has been presented on the weighted data set.

The fieldwork for the survey took place in the month of January 2022. The fieldwork of each assembly constituency was handled by a team of 2 field investigators. Interviews

State-wise achieved sample and weighted sample

S.No.	State name	Sample size achieved	Sample size after adjusting/ weighting for population proportion and key demographics
1	Andhra Pradesh	361	323
2	Assam	240	197
3	Bihar	532	698
4	Chhattisgarh	241	153
5	Delhi	222	118
6	Gujarat	361	374
7	Haryana	236	167
8	Jharkhand	238	204
9	Karnataka	439	384
10	Kerala	244	209
11	Madhya Pradesh	449	438
12	Maharashtra	668	725
13	Odisha	299	249

S.No.	State name	Sample size achieved	Sample size after adjusting/ weighting for population proportion and key demographics
14	Punjab	239	190
15	Rajasthan	419	455
16	Tamil Nadu	471	464
17	Telangana	237	217
18	Uttar Pradesh	1025	1304
19	West Bengal	542	594

Sample profile

	% in achieved sample	% in weighted sample
Men	57.2	51.6
Women	42.8	48.4
Rural	69.2	68.1
Urban	30.8	31.9
Hindu	81.0	80.8
Muslim	11.8	13.8
Christian	2.5	1.8
Sikh	2.1	1.7
Scheduled Caste	17.9	15.9
Scheduled Tribe	11.2	7.7

IMPORTANT THINGS TO KEEP IN MIND

The numbers shown in the Tables/Charts/Graphs are percentages, unless specified otherwise.

In many Tables/Charts, particularly those with many categories, the percentages may not add up to 100 due to rounding or because non-response has not been shown. Also, since figures have been rounded, discrepancies may occur at some places between sums of component items and totals.

Definition of Locations: Villages are those that have a Gram Panchayat. Towns are those that have a population of less than 1 lakh and either have a Nagar Panchayat or a Nagar Palika. Cities are those with 1-19 lakh population and with either a Nagar Palika or a Nagar Nigam. Big cities are those with population above 19 lakh and with a Nagar Nigam.

Definition of Regions: North West India includes the States of Haryana, Punjab and the Union Territory (UT) of Delhi. North India includes the States of Madhya Pradesh, Rajasthan and Uttar Pradesh. East India includes the States of Assam, Bihar, Chhattisgarh, Jharkhand, Odisha and West Bengal. West India includes the States of Gujarat and Maharashtra. South India includes the States of Andhra Pradesh, Karnataka, Kerala, Tamil Nadu and Telangana.

Definition of States/UT classified by language: Hindi-speaking States include Bihar, Chhattisgarh, Delhi,

Haryana, Jharkhand, Madhya Pradesh, Rajasthan and Uttar Pradesh. Non-Hindi speaking States include Andhra Pradesh, Assam, Gujarat, Karnataka, Kerala, Maharashtra, Odisha, Punjab, Tamil Nadu, Telangana and West Bengal.

Definition of Education categories:

Non-literates are those who didn't go to school at all/described themselves as illiterate. Primary school educated are those who studied in Classes 1 to 5 or cleared Class 5 but didn't clear Class 8. Middle pass are those who cleared Class 8 but didn't/haven't cleared Class 10. High school educated are those who studied/are studying in Classes 10 to 12. College educated are those who went to/are in college or got/pursuing a degree or diploma.

Caste and community categories

(Hindu Upper caste, Hindu OBC, Hindu SC, Hindu ST, Muslim and Other religious minorities) have been constructed from an interaction of the Caste Group (Scheduled Caste, Scheduled Tribe, OBC and General) and Religious identity questions (Hindu, Muslim and Others). For instance, anyone who described themselves as 'Scheduled Caste' and gave their religious identity as 'Hindu' has been included in the Hindu SC category. Similarly, those who said 'General' and 'Hindu' have been put in the Hindu Upper caste category.

Class categories (Poor, Lower class, Middle class and Rich) have been constructed by taking into account

occupation of the respondent, household type, household assets and monthly household income.

Internet users are those who either said they have access to internet on their mobile phone, or have at some point used internet through a broadband connection/dongle/hotspot at home, or confirmed internet usage for any purpose in the two months prior to the survey. 66% of the respondents were found to be internet users by this definition. However, many of them did not answer/understand the several

internet and social media-related questions asked in the survey indicating that they are passive internet users at best; i.e., they have access to the internet but don't use it much.

Active internet users are those who confirmed internet usage for any purpose in the two months prior to the survey. 38% of the respondents were found to be active internet users. Such users were also more opinionated on/responsive to internet and social media related questions and hence this variable has been used a lot.



MAPPING
MEDIA
PRESENCE
AT THE
HOUSEHOLD
LEVEL

INTRODUCTION

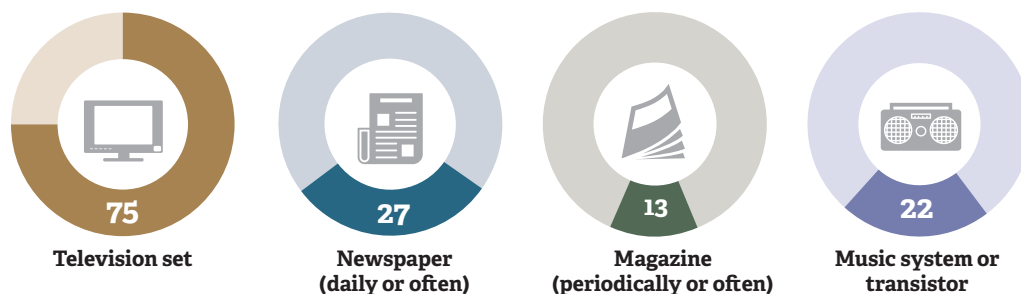
The digital age, born in the 90s, has brought with it much advancement in the media and communication assets used by the masses. New media technologies such as the internet, online networks, mobile devices, digital televisions etc. have fundamentally changed how people interact with each other and the world. They have also sparked a conversation over the relevance of traditional media sources. But while smartphones, smart TVs and 5G internet might be the advertised norm, lifestyles often do not adjust quickly. Change is not uniform, and occurs at different paces across different segments of the population due to socio-economic factors. While some households, especially the more prosperous and urban ones are quick to adapt, those that have lower incomes, are located in rural areas or in certain remote parts of the country do not adapt as quickly. The study

of this gap in media access, especially digital access, has in fact gained special significance of late because of the pandemic. Due to the Covid-19 outbreak and the resultant lockdowns, a considerable part of people's lives have moved online and this has proven to be particularly challenging for less privileged households that have found it difficult to adapt to the increasingly digital environment. Numerous studies have already highlighted this digital divide and how certain sections of society struggled to cope, particularly with online education, due to a lack of computers and laptops at home or the lack of a reliable internet connection. The main objective of the first section of this report therefore is to serve as a reality check and to highlight the complexity and variation of media access at the household level (as opposed to the individual level) as revealed by the nationally representative survey.

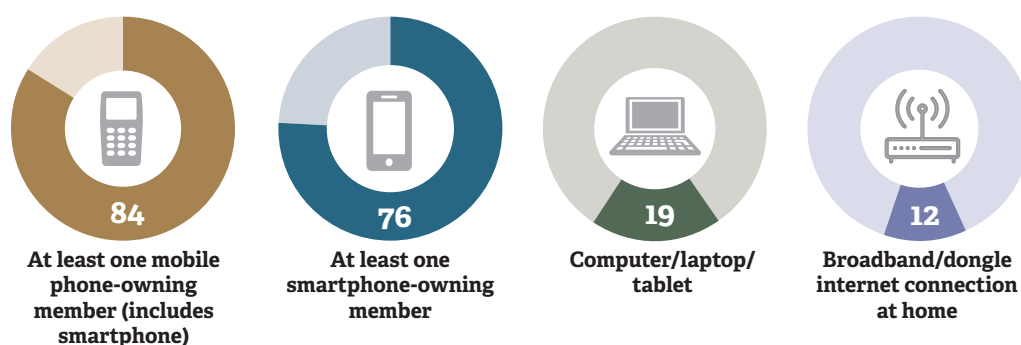
HOUSEHOLD-LEVEL ACCESS TO DIFFERENT MEDIA

1.1: Presence of media and communication sources in Indian homes

TRADITIONAL SOURCES AT HOME



NEW OR RELATIVELY NEWER SOURCES AT HOME



Note: Figures shown here and in the other charts in this section are percentages, unless specified otherwise.

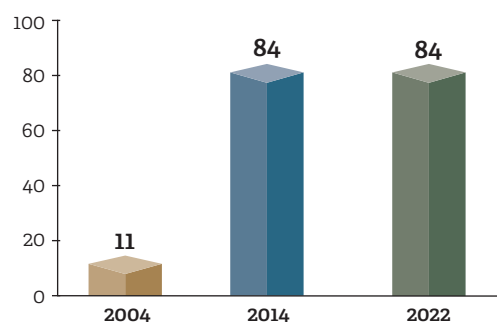
1.1: In January 2022 people were asked a spread of questions about whether their household had certain new and traditional sources of media and communication. It was found that mobile phones, as a whole, have managed to penetrate Indian households the most (even more than television sets) despite their relative novelty compared to other sources. Over four-fifths of respondents reported that their household has at least one mobile phone-owning member. As for smartphones specifically, three-fourths reported having at least one smartphone-owning member at home. Despite the high permeation of mobile phones/smartphones, other digital equipment like laptops or tablets have not seen the same widespread adoption. Only one-fifth of the households reported having a computer/laptop or tablet at home. Moreover, only a little

over one-tenth of households reported having access to the internet at home through a broadband connection. This indicates that the internet is mostly being accessed by people through their mobile phones in India. While there is no doubt that smartphone penetration is quite high, a fairly sizable proportion of households (one in every four) reported not having even one smartphone at home. Furthermore, the fact that many also reported not having a computer/laptop/tablet or a reliable and stable connection to the internet at home raises questions about the state/practicality of online education in the country. As far as old/traditional media sources are concerned, three-fourths of respondents reported that their house has a television set at home. Only one-fourth of households get a newspaper at home on a regular basis.

1.2: Growth in mobile phone ownership at the household level

1.2: Between 2004 and 2014 the proportion of households owning mobile phones (at least one) increased nearly eight-fold from 11% to 84%. The growth however appears to have come to a stop, and remains stagnant, at least till the time of this survey in January 2022. Interestingly though, in 2004 household-level ownership of mobile phones was less than that of TVs (compare with Figure 1.6). Now, the trend has reversed. There are more households with at least one mobile phone-owning member in India today than there are households with a TV set.

AT LEAST ONE MOBILE PHONE AT HOME

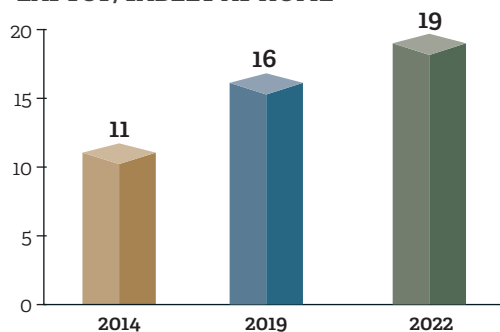


Note: 2014 figures are based on merged data from 3 rounds of Lokniti-CSDS' National Election Study (NES) in 2014; question on mobile phone ownership wasn't asked for the HH-level in NES 2019.

1.3: Growth in ownership of computer/laptop/tablet at the household level

1.3: The proportion of Indian households that own a computer/ laptop/tablet has seen a steady increase during the last decade or so. In 2014, one in ten households owned a computer/laptop/tablet; now nearly two in ten do. While the growth off the low base has no doubt been impressive, the current number nonetheless appears to be rather low, especially in the context of the pandemic. In 2019 (pre-pandemic) 16% of Indian households owned a computer/laptop/tablet and in the last three years this figure has only gone up by three percentage points. On the other hand the smartphone market has seen a boom during the same period (see section 2 of this report). The higher cost of laptop/tablets and the fact that smartphones essentially work as mini-computers/laptops and perform many of the same functions as computers do might explain

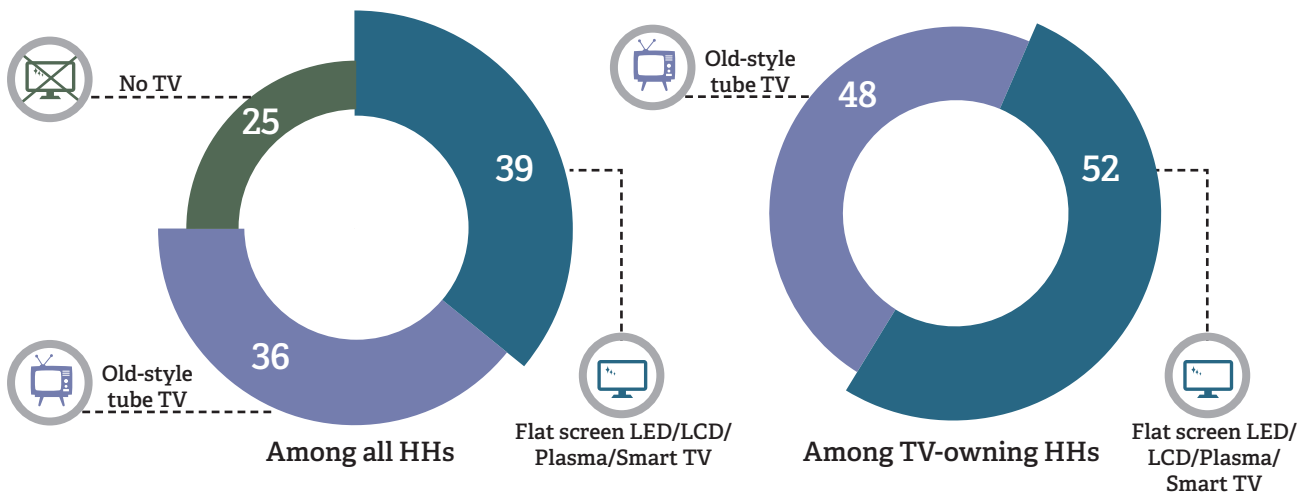
AT LEAST ONE COMPUTER/ LAPTOP/TABLET AT HOME



Note: 2014 figure is based on merged data from 3 NES 2014 rounds conducted between Jan 2014 and May 2014.

the low penetration of computer/laptops/tablets. The low penetration also indicates that much of the online education that took place during the pandemic happened on smartphones and not on the larger screens of laptops or tablets.

1.4: Types of television sets across households

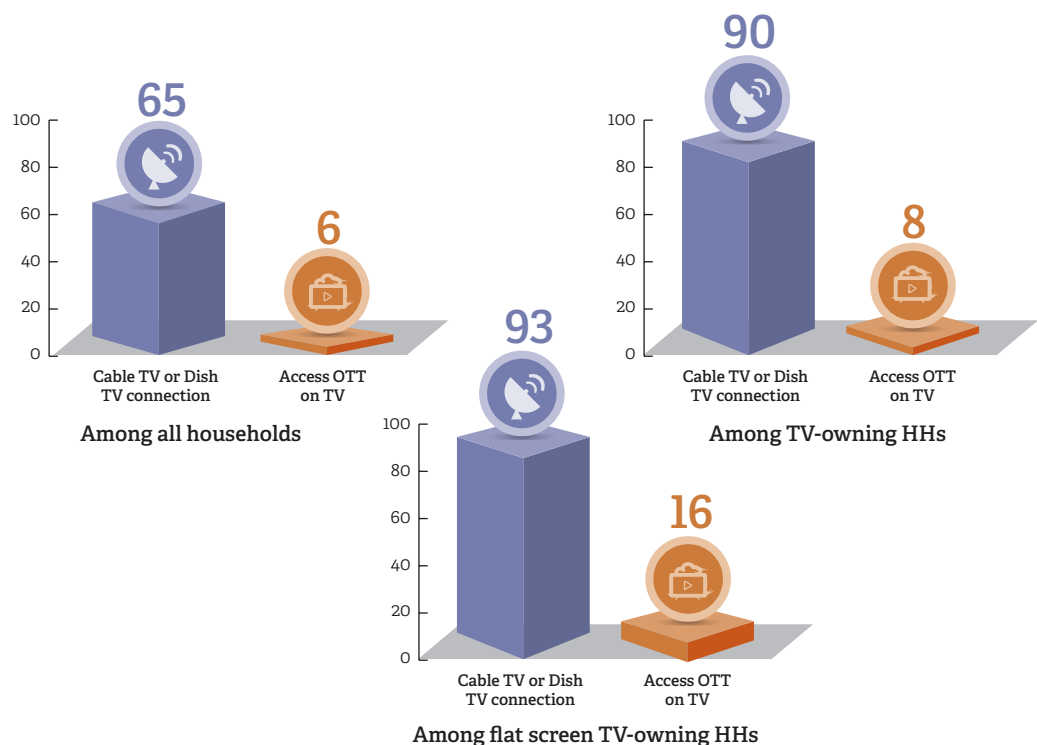


Note: Those who said that their household had both types of TVs have been included in the flat screen TV category

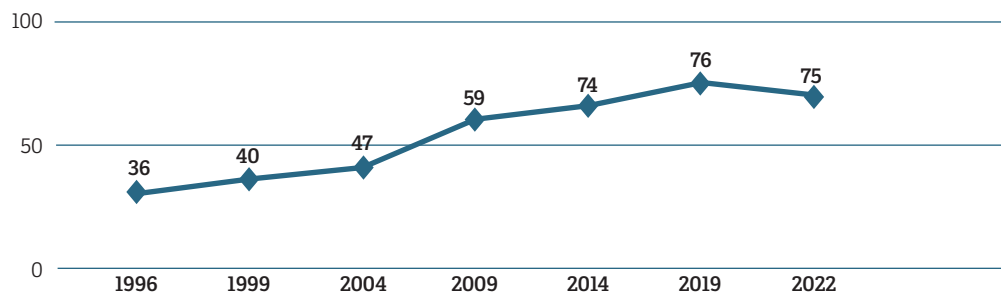
1.4: A closer look at the ownership of TVs shows the inability of many households to upgrade their TV sets. Where 52% of TV-owning households have upgraded to a more contemporary flat screen TV, 48% of TV-owning households still own an old style tube TV despite the existence of an alternative in flat screen TVs for almost two decades.

1.5: Nine out of ten households with TV sets have a Cable or Dish TV connection. As far as access to OTT platforms on TV is concerned, around one-tenth of all TV-owning households and one-sixth of flat-screen TV-owning households access OTT platforms on their TV. This statistic is only likely to grow as more households upgrade to flat screen TVs, especially smart TVs.

1.5: Connections on television



1.6: Growth in TV ownership appears to have stagnated after steady increase for two decades

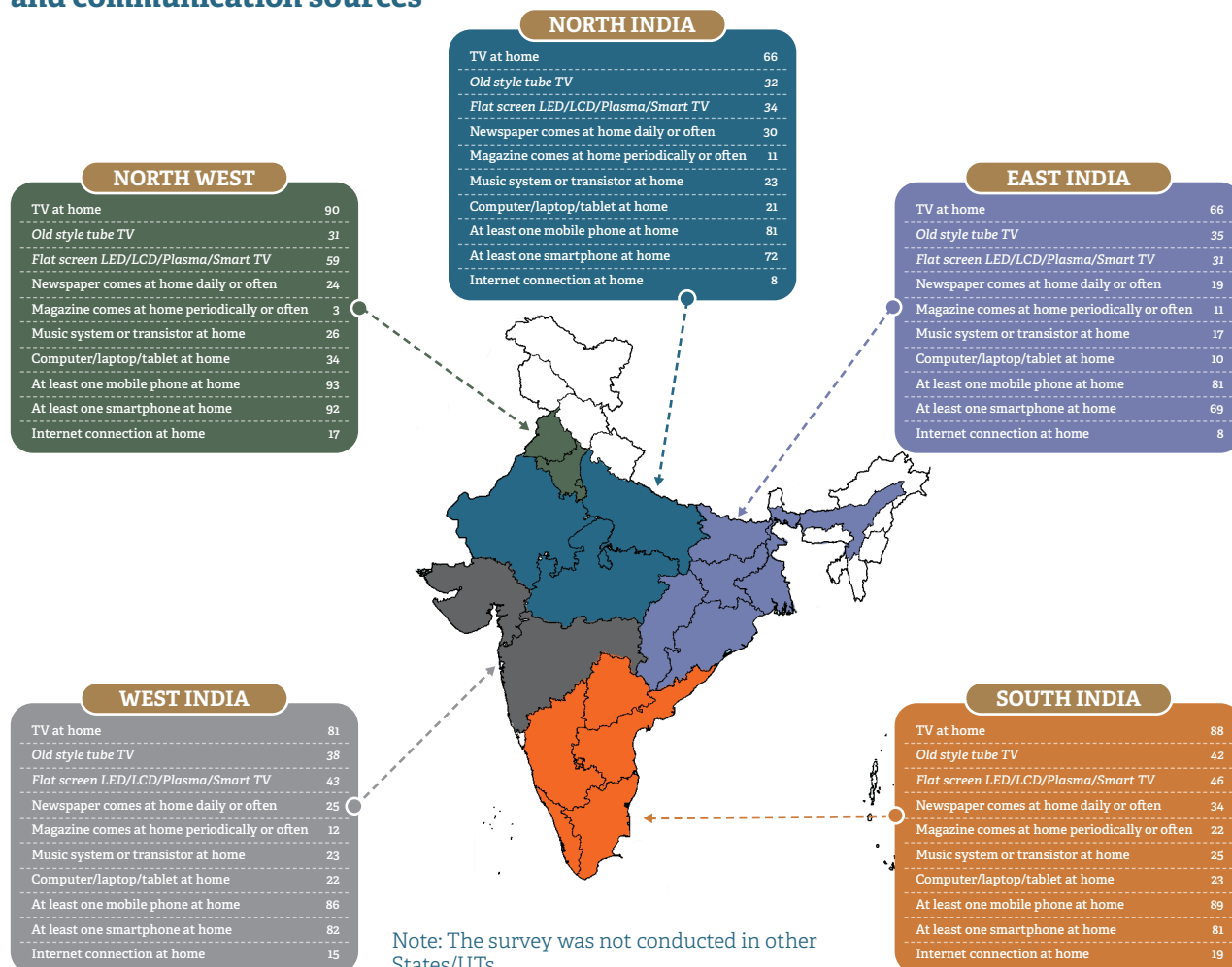


Note: 2014 and 2019 figures are based on merged data from multiple NES rounds conducted just a few weeks apart from each other

1.6: The proportion of TV-owning households grew progressively for nearly two decades between 1996 and 2014. In 1996 only one-third of households in India owned a television set, in 2004 nearly half did, and by 2014,

three-fourths of Indian homes had at least one TV set. However, from 2014 onwards this growth has plateaued with the proportion of TV-owning households remaining at around three fourths.

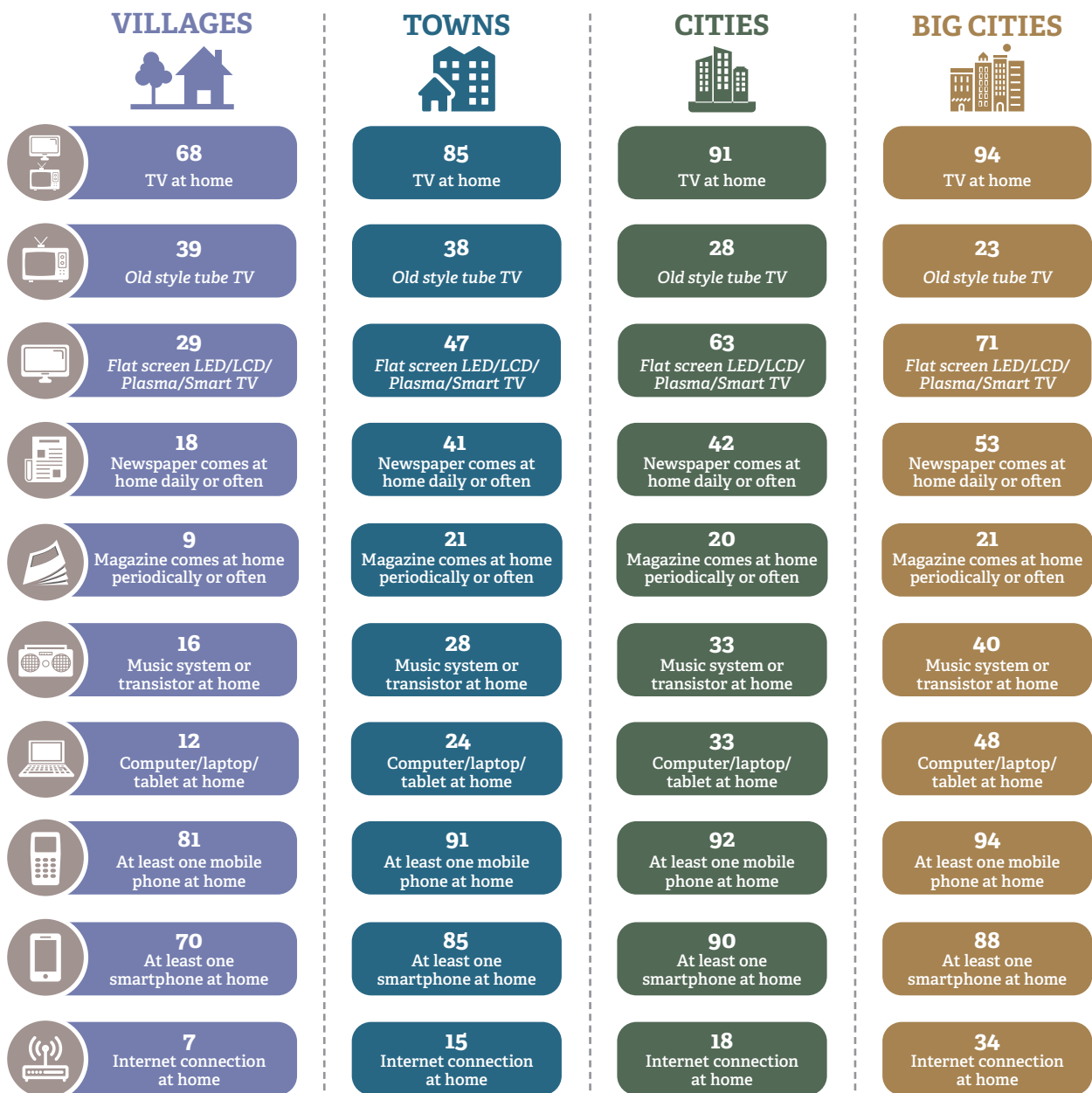
1.7: Households in North West and South India have the greatest presence of media and communication sources



1.7: On the whole, households in North West India, South India and to a large extent West India show the greatest access to various media devices (TV, mobiles, computers etc.) and connections. Where South India however differs from the North West and West India is with respect to print media. Households in the southern states (all taken together) seem to have a far stronger reading culture than

other parts of the country and are far more likely to subscribe regularly to newspapers and magazines than households in West and North West India. Interestingly, newspaper subscriptions are also quite high in North India, a region that otherwise doesn't fare all that well on other media parameters. East India is the worst performing region in terms of household media and communication presence.











1.8: On average, a smaller settlement will have households with fewer sources of media and communication



1.8: As we move further and further away from urban spaces we find that access to media and communications devices reduces greatly, reflecting the urban-rural divide. The differences between big cities, cities and towns are marginal in most cases. However, in certain specific instances such as having a reliable internet connection at home,

owning a computer/laptop/tablet and owning a flat screen TV, there is a visible gap. Villages on the other hand differ by a big margin from the other three more urban categories except when it comes to having a mobile phone. Big cities and cities are also highly saturated in ownership of TVs and mobile phones.

1.9: Not surprisingly, households with a higher monthly income are more likely to own a greater number of media and communication sources

		Monthly HH income (in rupees)			
		Below 10000	10000 to 19000	20000 to 39000	40000+
	TV at home	63	83	92	93
	Old style tube TV	40	40	27	17
	Flat screen LED/LCD/Plasma/Smart TV	23	43	65	76
	Newspaper comes at home daily or often	14	30	46	63
	Magazine comes at home periodically or often	6	16	23	30
	Music system or transistor at home	10	22	41	60
	Computer/laptop/tablet at home	7	20	36	59
	At least one mobile phone at home	76	91	97	98
	At least one smartphone at home	63	87	94	97
	Internet connection at home	5	10	23	37

1.9: The figures in 1.9 confirm a fairly predictable positive association between incomes and the access to/ownership of media and communication sources by a household. Households with a greater monthly income have greater access to media and communication devices, while those with a lower monthly income, in turn, have less access to them. That said, three-

fourths of the lowest income earning households (below 10,000 a month) did report having access to a mobile phone, and almost two-thirds had access to a smartphone. This says something about not just a smartphone's cost but its utility as well. The fact that many welfare schemes are tied to a mobile phone now might also be a motivating factor to own a smartphone.

1.10: Adivasi community households own the fewest number of media and communication sources

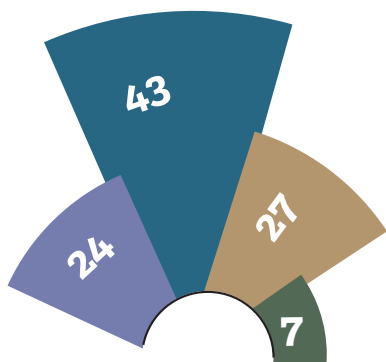
	Hindu Upper caste	Hindu OBC	Hindu SC	Hindu ST	Muslim	Oth
 TV at home	87	74	70	59	66	87
 Old style tube TV	31	36	41	37	36	38
 Flat screen LED/LCD/Plasma/Smart TV	56	38	29	22	30	49
 Newspaper comes at home daily or often	40	26	22	9	23	29
 Magazine comes at home periodically or often	20	12	13	5	11	12
 Music system or transistor at home	35	18	18	12	20	24
 Computer/laptop/tablet at home	33	17	11	7	14	29
 At least one mobile phone at home	92	86	80	67	84	89
 At least one smartphone at home	89	76	67	60	73	88
 Internet connection at home	20	11	9	7	8	16

1.10: The Hindu Scheduled Tribe or Adivasi community has the least access to any media and communication, followed by the Hindu Scheduled Caste (Dalit) and Muslim communities. Hindu Upper Caste households have

the highest access to media and communications sources, followed closely by others (non-Muslim religious minorities taken together). The Hindu OBC communities (all taken together) fall in the middle.

THE BROAD PICTURE

1.11: Index of presence of media and communication sources at the household level



- High media presence (5 to 8 items)
- Moderate media presence (3 to 4 items)
- Low media presence (1-2 items)
- No media presence whatsoever (No item)

1.11: While figure 1.1 displays data on the presence (ownership of/access to/ subscription to) of 8 types of media and communication sources in

Indian households, figure 1.11 shows the quantity of media devices/sources owned/accessed/subscribed to by households. Simply put, when all 8 media and communication items/sources shown in figure 1.1 were considered together and a summated index was created (see Appendix for details), it was found that a little over one-fourth of households own/have access to/ subscribe to 1-2 media and communication sources and around 7% have no media item at home whatsoever. Two-fifths of households have media and communication sources in moderate quantity (they own/access to/subscribe to 3-4 media and communication sources) and about one-fourth households have them in high quantity (5 to 8 media-related items are at home).

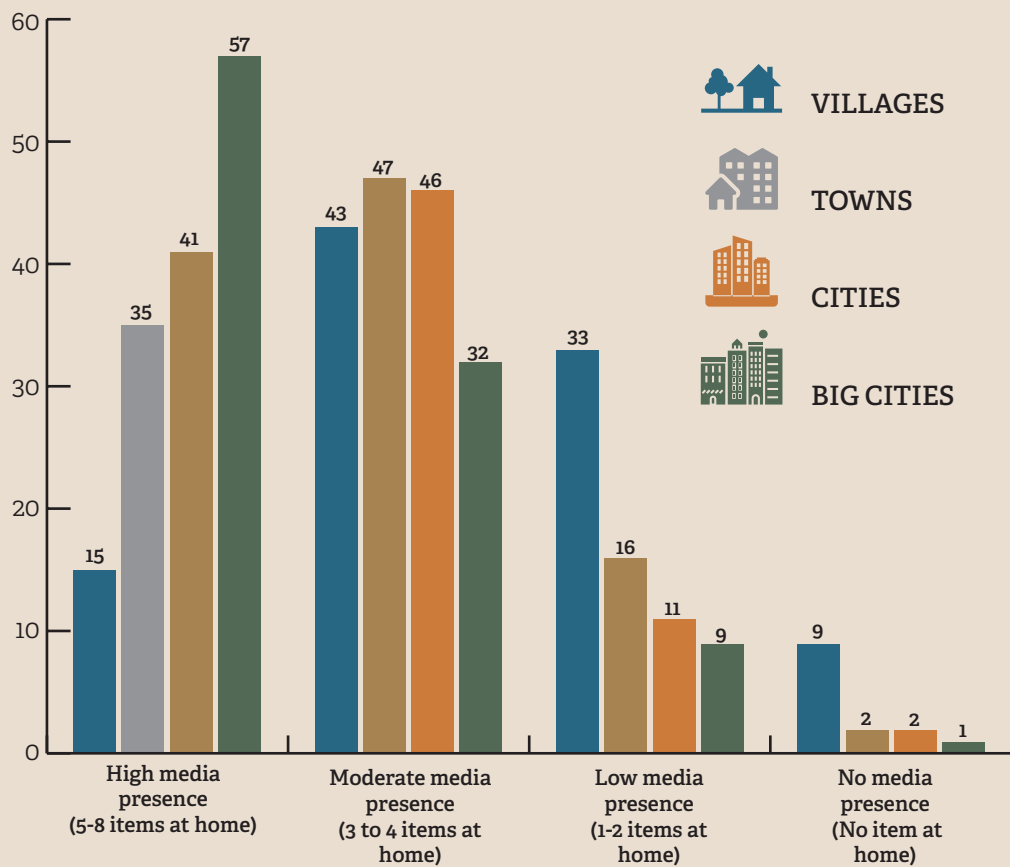
1.12: Sources of media are present the least in households in East and North India

	N W India	North India	East India	West India	South India
High media presence (5 to 8 items at home)	28	25	15	25	32
Moderate media presence (3 to 4 items at home)	57	35	42	48	47
Low media presence (1-2 items at home)	14	31	35	23	17
No media presence at all (No item at home)	1	9	8	4	4

1.12: Due to South India's higher number of print media subscriptions, it has the highest proportion of households with a high media presence followed closely by North West India which loses out because of a lower print media subscription rate. The lowest presence of media is in East and North

India; here one in three households own/have access to/subscribe to only 1-2 media sources. Contrary to North West India where only one household in a 100 does not have any media presence, a tenth of all houses in North India have a complete lack of any media presence.

1.13: Media presence is high in urban households, low in rural ones



1.13: Big cities, cities and towns hardly have any households without any media presence, but in villages almost one in every 10 households has no media presence. The urban-rural divide shines most starkly when comparing high media presences. In big cities, almost six in 10 households

report high media presences, compared to less than two in ten village households having the same degree of media presence. A clear grading of the media presence can be seen of households on average in big cities, cities, towns and villages through this table.

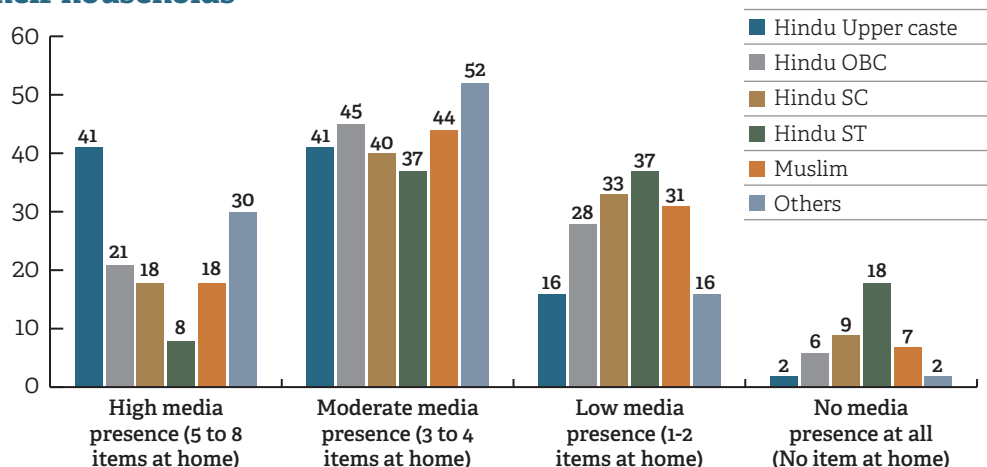
1.14: 70% of households with a monthly income greater than Rs 40k have high media presence in their households

	Monthly HH income (in rupees)			
	Below 10,000	10,000 to 19,000	20,000 to 39,000	40,000+
High media presence (5 to 8 items at home)	9	26	48	70
Moderate media presence (3 to 4 items at home)	40	54	45	26
Low media presence (1-2 items at home)	40	18	7	4
No media presence at all (No item at home)	11	3	1	--

1.14: Household wealth acts as a determinant for the number of media devices/sources a household owns/has access to/subscribes to. There's no household with an income of over 40,000 rupees per month that has

zero media presence. 96% of these households have moderate to high media presence. Half the households with monthly income of less than 10,000 rupees have either low or no media presence.

1.15: Adivasis have the least number of media devices/sources in their households



1.15: Media is most accessible to Hindu upper caste households followed by households belonging to non-Muslim minority communities. It is least accessible to Hindu Adivasi (ST) households who are largely disconnected from media. Among Hindu upper caste and non-Muslim minority households, 80% have at least

three media items at home. On the other hand more than half the Hindu Adivasi households have two media items or less in their households. 42% of Hindu Dalit (SC) households are also in a similarly isolated position. Muslim and Hindu OBC households don't fare all that well either.



MEDIA
CONSUMPTION
PATTERNS:
STARTING WITH
THE BASICS

(TV, NEWSPAPER, RADIO AND MOBILE)

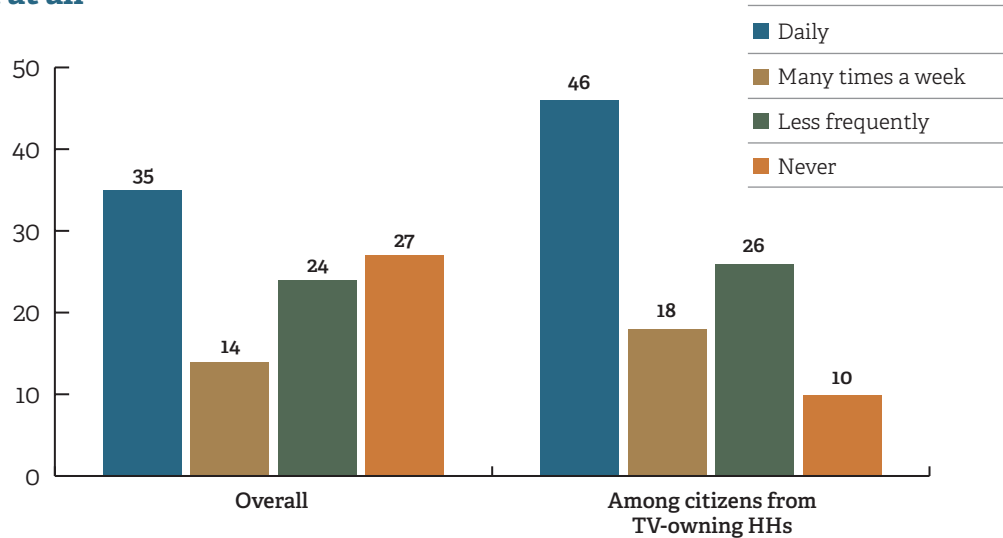
INTRODUCTION

In the last two decades, the way in which people consume media has changed dramatically. Gone are the days when the television screen was the only screen that people were hooked to. The advent of computers and mobile phones in the late 1990s has meant that there is now a 'second screen' that vies for people's attention. Some studies in the West have shown that people, particularly the young, spend more time staring at their phone screen than at a television screen. Nevertheless, what is also true is that even with the widespread penetration of mobile devices in everyday life, television has held its own. Newspapers and

radio haven't disappeared either. The traditional forms of media are still alive and continue to command a fair share of the population's attention and patronage. In fact, in India and much of the developing world the situation could still well be leaning in favour of traditional media rather than the new digital alternatives. Hence, in order to find the true picture, the Media survey posed a series of questions to the citizens related to their usage or consumption of different types of media, both 'old' (television, newspapers, radio) and new (mobile phones, computers etc.). This section of the report details the findings to have emerged from those queries.

TELEVISION VIEWING PATTERNS

2.1: Half of India watches TV regularly; a quarter doesn't watch it at all

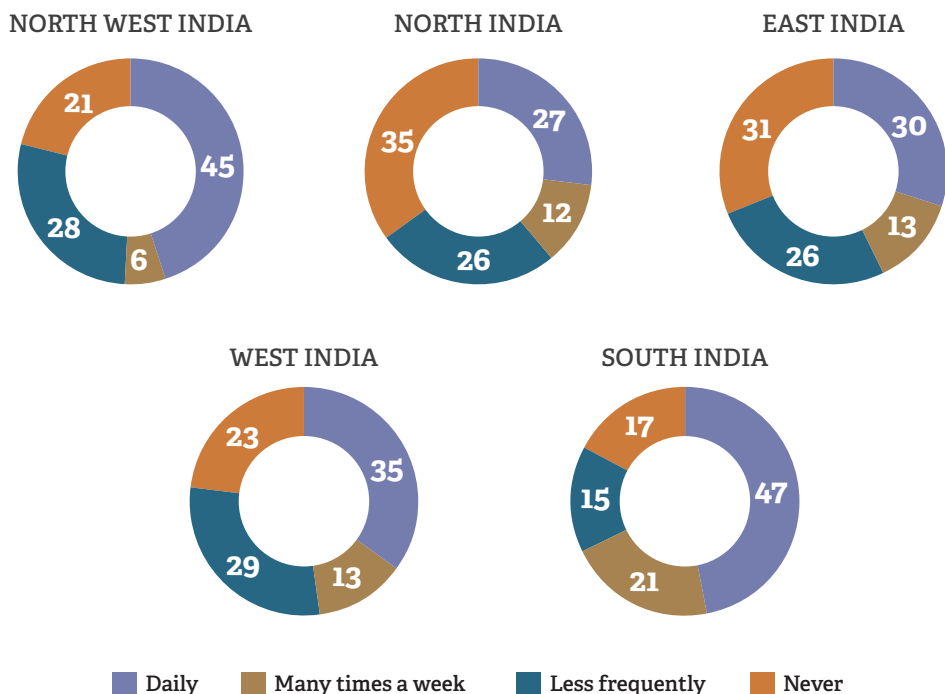


Note: Figures shown here and in the other charts in this section are percentages, unless specified otherwise

2.1: A little over one-third of all 15+ Indians watch TV daily. One in seven views it many times a week and around a quarter watches it less frequently

than that. A little over one in four never watches television. This seems to be primarily because they don't own a television set.

2.2: South Indians are watching TV far more regularly than others



2.2: Of all the regions, TV consumption is highest in South India. Nearly seven out of 10 citizens in the Southern states (combined) reported watching TV regularly, i.e., either daily or many times a week. North West and West India came next at around 50%. However, North and East India do not seem to be watching a great deal of TV. As highlighted in section 1 of this report, the two regions are also those where

households are least likely to own a TV set. Interestingly, even though nine out of ten respondents in North West India reported that their household owns a TV set (see section 1), quite a few of them reported not watching TV at all. On the other hand, a fair number of those in North, East, West and South India who reported not having a TV set at home, still reported that they watched TV, albeit infrequently.

2.3: Who is watching TV more, and how regularly?

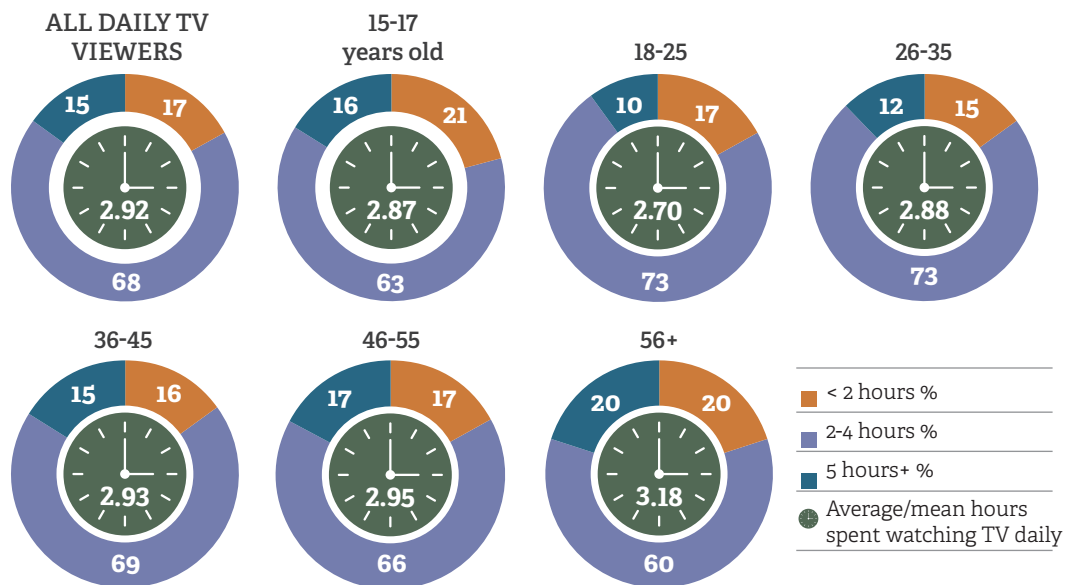
	Daily	Many times a week	Less frequently	Never
Location				
Villages	29	11	26	33
Towns	42	19	21	18
Cities	45	20	22	12
Big cities	54	19	17	11
Age group				
15-17 years old	36	18	26	20
18-25	36	16	28	20
26-35	38	14	25	22
36-45	36	14	24	27
46-55	33	14	24	29
56+	29	11	21	39
Gender				
Women	35	13	21	30
Men	34	14	28	24
Economic class				
Poor	20	9	24	47
Lower Class	30	13	26	30
Middle Class	42	16	24	18
Upper Class	50	17	22	12
Education				
Non-literate	17	9	22	52
Primary school	27	12	26	35
Middle pass	35	14	26	26
High school	43	17	24	15
College and above	50	16	24	10

2.3: Some interesting patterns emerge on disaggregating the TV viewing data by key socio-demographic categories such as urbanity, age-group, gender, economic class and education. TV viewing happens least in villages and increases with urbanity. This pattern remains the same, even when measuring strictly TV-owning households. In other words, a person from a TV-owning household in a village is still less likely to watch TV than a person from a TV-owning household in an urban area. Rather counter-intuitively, older age groups view less TV than younger individuals, even though many among the former are more likely to spend more time at

home than the latter. Women are as likely to watch TV regularly as men; however in overall terms their TV viewing is less than that of men. This is because the proportion of women that do not watch TV at all is higher than that of their male counterparts. Poor and lower class citizens, even those that have a TV at home, are far less likely to watch TV than middle and upper class citizens. Although watching TV doesn't really require literacy like newspaper reading does, data suggests that the activity is related to education levels. The more educated a person the more likely they are to watch TV and this is true across all classes, even the well-off.

GAUGING LEVEL OF TV ADDICTION

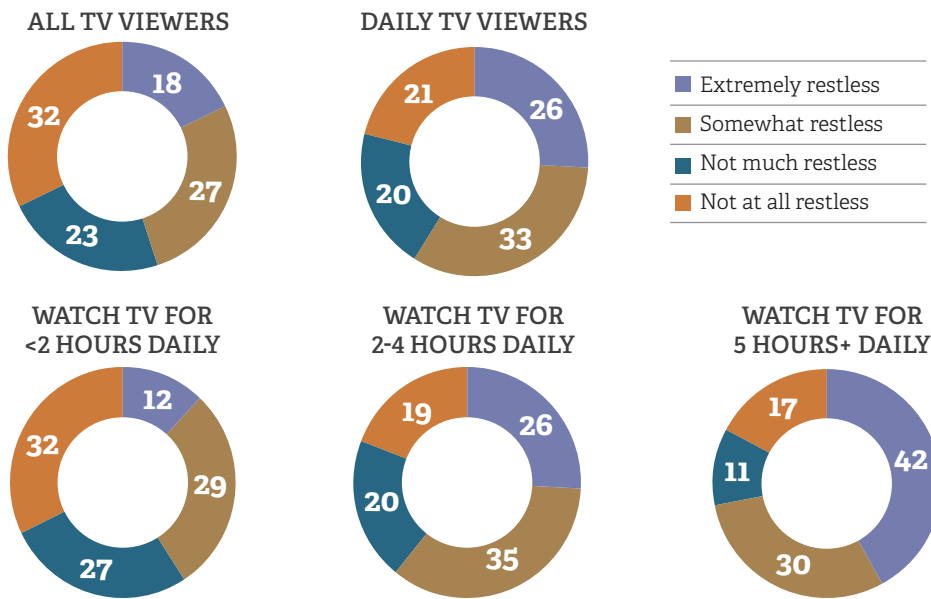
2.4: How much time are daily TV viewers devoting to TV daily?



2.4: An analysis of the findings related to the time spent watching TV daily reveals that a large proportion of daily TV watchers spend anywhere between 2 to 4 hours everyday watching the idiot box. Only about one in seven are excessive in their TV viewing, spending 5 or more hours watching it daily. Taking all daily TV viewers into consideration,

the average time watching TV everyday comes to 2.92 hours. Middle aged and elderly respondents spend more time watching TV daily than younger respondents. This means that even though the younger cohort is more likely to watch TV daily than the older cohort (see Figure 2.3), it spends less time on it everyday than the latter.

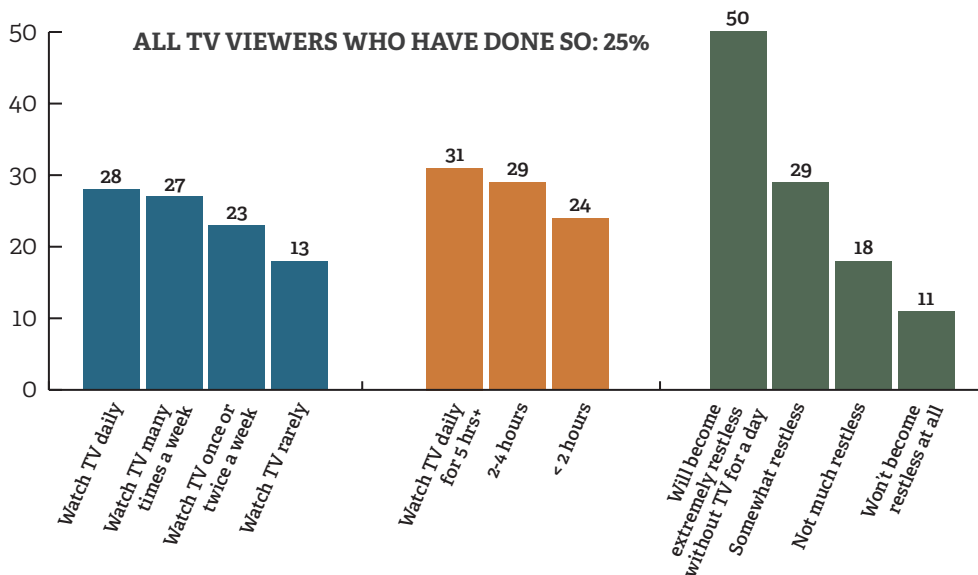
2.5: Quite a few TV viewers would feel restless if TV is taken from them for a day



2.5: A large proportion - 59% - of daily TV viewers said that they would feel extremely or somewhat restless if they had to spend a day without TV. The figure was even higher (72%) among daily

viewers of TV who watch it for 5 or more hours everyday. In fact, one notices a clear trend. The likelihood of feeling restless without a TV increases with the number of hours a person spends watching it.

2.6: Proportion of TV viewers who have attempted to reduce their TV viewing

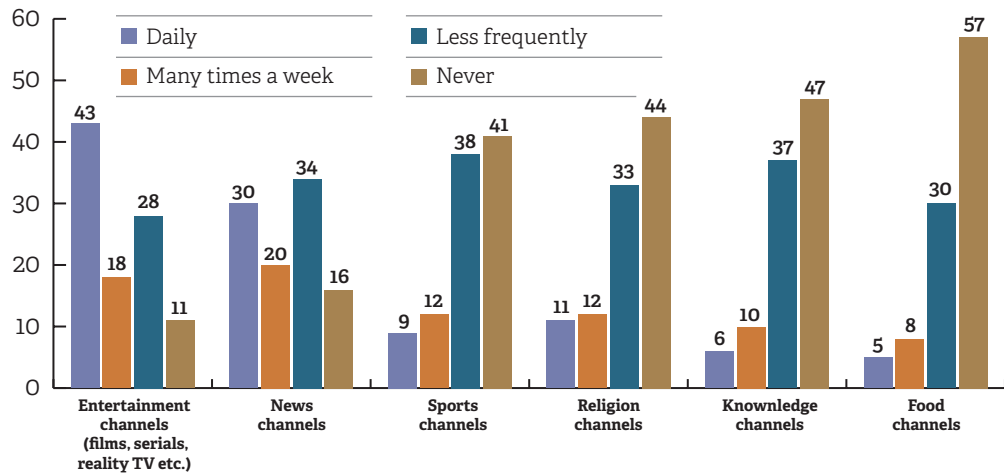


2.6: A sizeable section of TV viewers want to reduce their TV consumption. Around 25% of all TV viewers and 28% of all daily TV viewers said that they have at some point attempted to reduce

their TV time. Moreover, those that are more likely to feel restless without the TV for a day are more likely to have made attempts to cut down their TV viewing.

POPULARITY OF DIFFERENT GENRES ON TV

2.7: News is being consumed on TV nearly as much as entertainment, although not as regularly

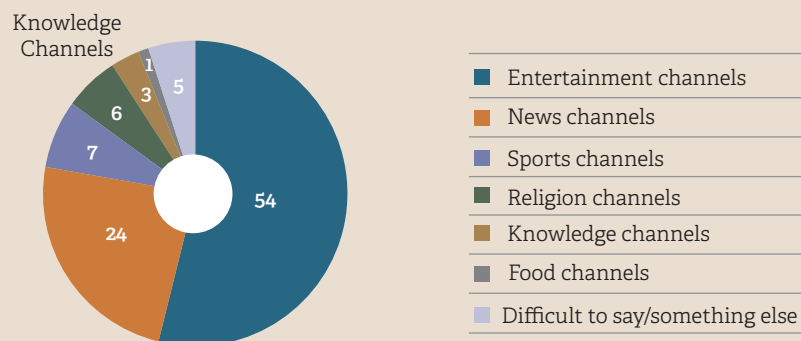


Note: Figures are of those who said they watch TV

2.7: The survey asked those who watch TV about the regularity with which they watched channels of different genres. Unsurprisingly, entertainment channels (films, serials, reality TV etc.) came out on top ahead of all other types of channels. A little less than nine out of ten (89%) TV viewers watch them. Interestingly, the practice of watching

news on TV is not too far behind. A total of 84% said that they watch news channels. Sports and religious channels came next - 59% and 56% watch them, respectively. Food and knowledge channels were found to be the least watched channels of all. Nonetheless a sizable proportion does watch them, but not regularly.

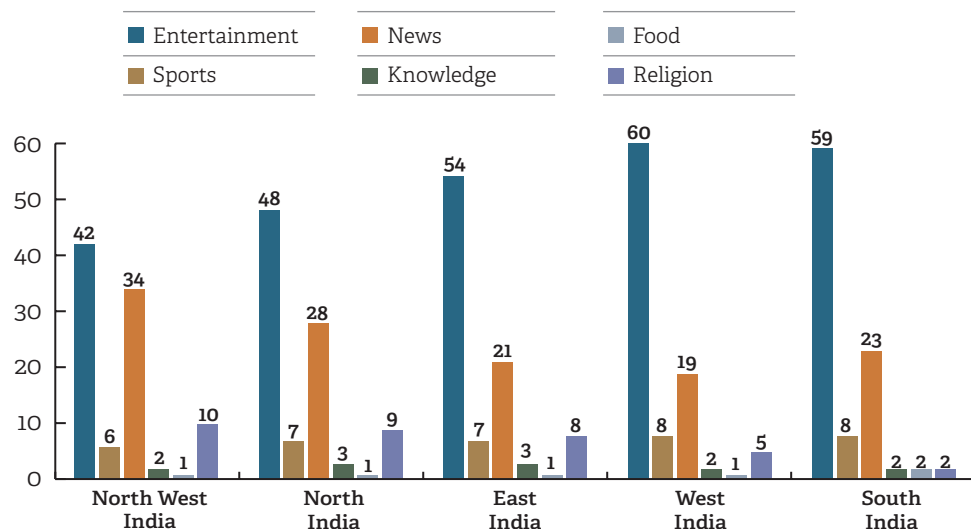
2.8: Genre preferred most of all: TV viewers prefer watching entertainment far more than anything else



2.8: When asked about the type of channel they watched the most, more than half of all television viewers reported viewing entertainment-related channels the most. The

second most common type of channel watched is news channels, with about a quarter of respondents stating that they watch them the most.

2. 9: Entertainment channels are preferred most in West and South India, far more than anywhere else



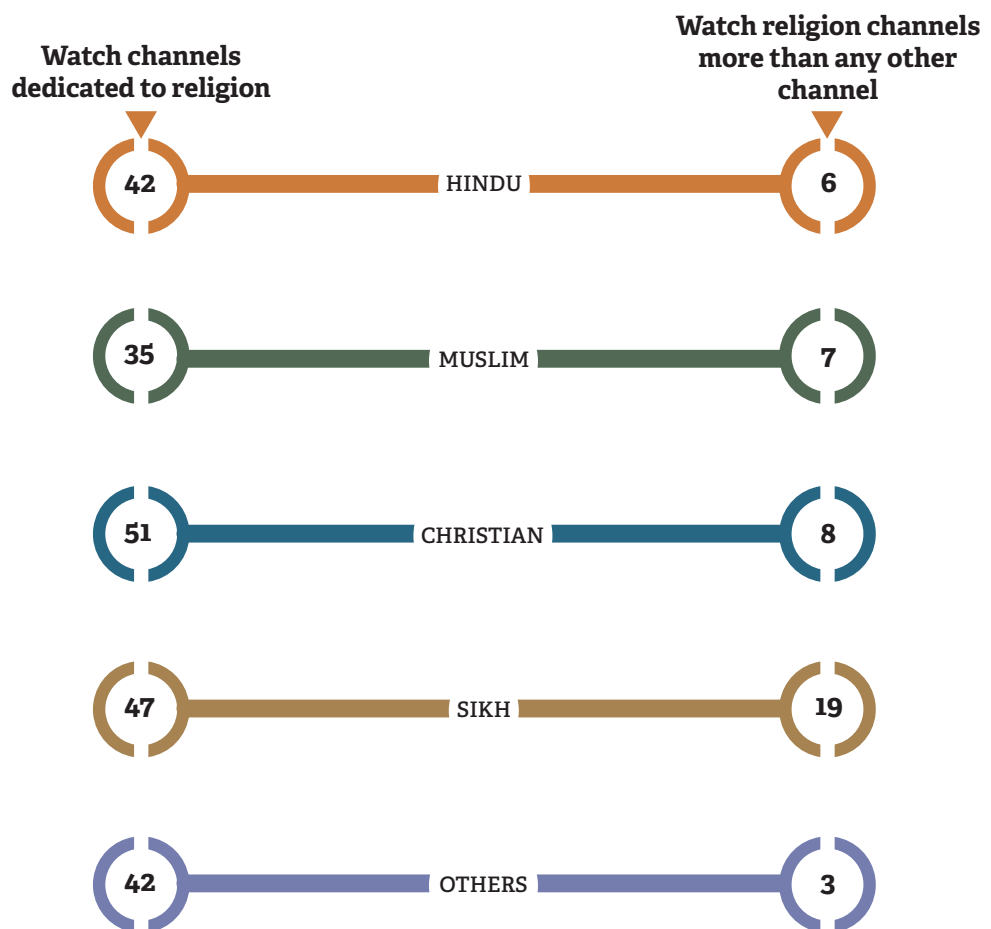
2.10: Who is watching what on TV the most?

	Most preferred genre on TV					
	Entertainment	Sports	News	Knowledge	Food	Religion
Location type						
Villages	53	7	24	2	1	7
Towns	52	9	25	2	1	8
Cities	57	7	23	3	2	5
Big cities	59	4	22	4	3	5
Age group						
15-17	65	20	8	4	<1	1
18-25	61	13	15	4	1	1
26-35	60	8	20	3	2	3
36-45	55	5	26	2	2	5
46-55	48	2	33	1	1	10
56+	37	2	34	2	<1	16
Gender						
Women	68	1	12	3	3	9
Men	42	12	35	2	<1	4
Economic class						
Poor	58	6	15	2	1	9
Lower Class	60	5	19	2	2	7
Middle Class	53	8	25	3	1	6
Upper Class	39	11	41	3	1	3
Education						
Non-literate	53	2	19	2	<1	15
Primary school	54	2	21	2	1	12
Middle pass	56	5	25	2	1	6
High school	57	8	23	2	2	4
College and above	48	13	30	5	1	2

2.10: Even though entertainment channels were found to be the most preferred viewing option of TV viewers across nearly all socio-demographics, there are some interesting trends that bear mention. Young people show higher preferences for entertainment, sports and knowledge channels, whereas news and religious channels are preferred by elderly people. Women prefer entertainment channels far more than men, whereas men tend to prefer sports and news channels. Entertainment TV is preferred most by poor and lower class people and news and sports are preferred more by upper

and middle classes. Interestingly, the upper class is the only class among whom entertainment channels aren't the most preferred. Instead news channels are. Men do not prefer cooking or food related channels. Those that did report viewing these channels were found to be exclusively women, typically residing in cities. Knowledge channels are more preferred amongst youngsters, urban citizens and the highly educated. As far as religious channels are concerned, they are more likely to be the first choice of the non-literate and barely literate, compared to the moderately and highly educated.

2.11: Sikhs and Christians consume religious TV more than others

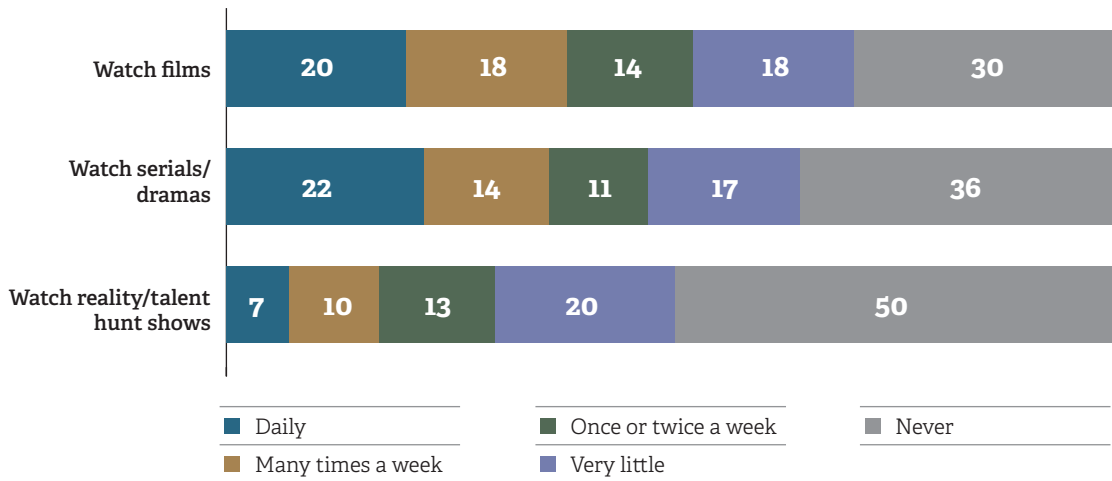


2.11: Christians and Sikhs are most likely to view religious channels when compared with other communities.

Sikhs are also more likely to prefer religious channels over any other type of channel compared to other communities.

POPULARITY OF ENTERTAINMENT FORMS

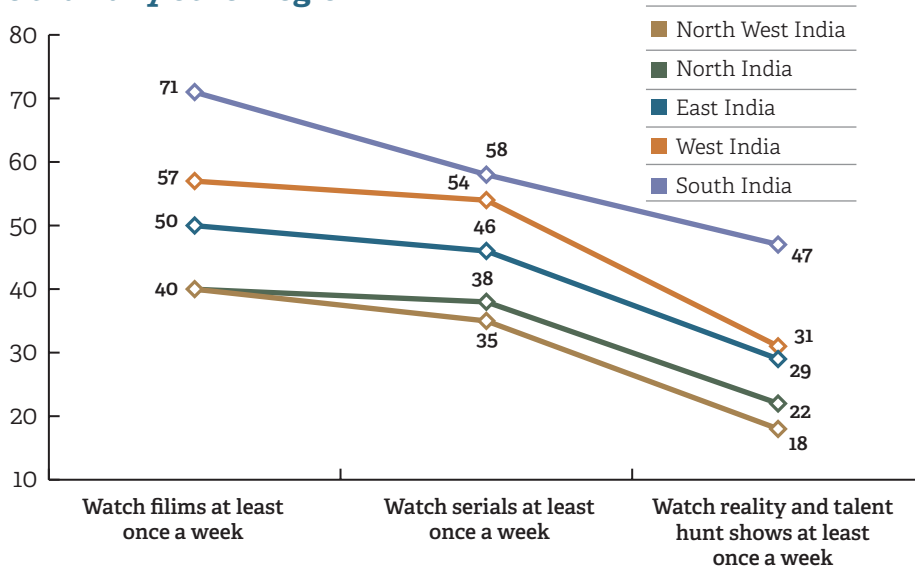
2.12: Around one-fifth of citizens watch films and serials daily



2.12: Given that people prefer to consume entertainment more than anything else, the survey dug a bit deeper and attempted to find out the frequency with which people were consuming the three most popular forms of entertainment, these being, films, serials/dramas and reality TV shows. The question was not just asked to TV viewers alone but to all respondents keeping in mind that

entertainment is not being viewed on TV alone, but also on many different media platforms. The results were on expected lines. Films were found to be the most watched of all three forms of entertainment, TV serials were a close second, and reality shows a distant third in comparison. It is however interesting that TV serials are nearly as popular as films, which may not have been the case about a decade or two ago.

2.13: South India consumes films, serials and reality shows far more than any other region



Note: Figures are combined percentages for daily, many times a week and once or twice a week.

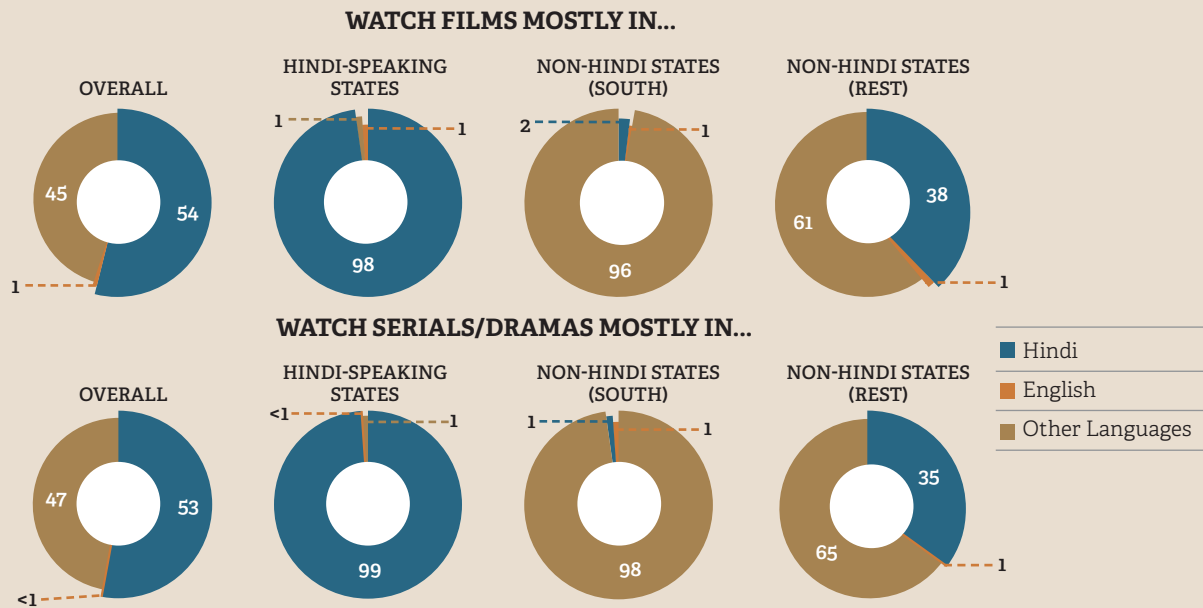
2.14: Who is more likely to watch films, serials and reality shows?

	Watch films at least once a week	Watch serials at least once a week	Watch reality and talent hunt shows at least once a week
Location type			
Villages	46	42	25
Towns	60	54	36
Cities	64	57	42
Big cities	70	61	44
Age group			
15-17	72	54	45
18-25	71	56	43
26-35	61	54	37
36-45	51	47	27
46-55	45	43	24
56+	30	31	16
Gender			
Women	49	54	30
Men	55	40	31
Economic class			
Poor	38	35	17
Lower Class	49	47	26
Middle Class	61	54	37
Upper Class	60	46	42

2.14: Those in urban areas, particularly larger cities, are more likely to watch films, serials etc. than those in villages. Younger people are more likely to consume entertainment than the elderly. While men are more likely to watch films than women, women are

more likely to watch serials than men. Class also seems to play a significant role. Watching films and reality shows seems to be more of an upper and middle class pastime whereas drama viewing appears to be more of a middle class and lower class one.

2.15: Hardly anyone seems to be watching English films and dramas

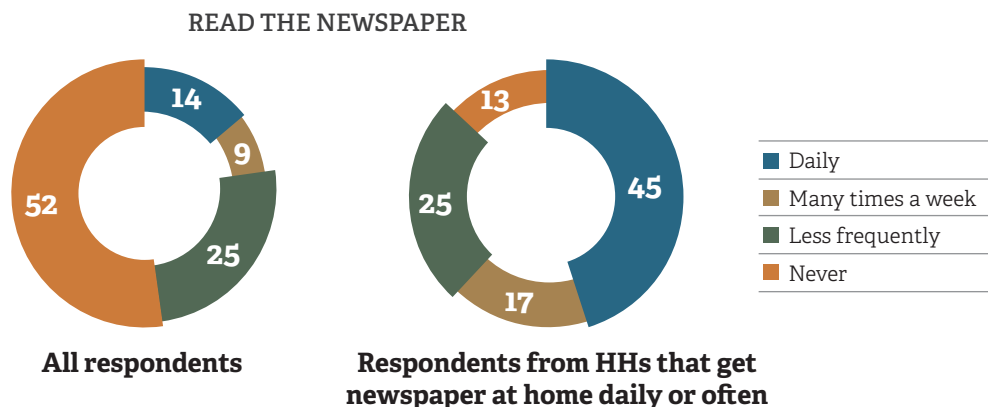


2.15: Those that reported watching films and TV dramas were also asked to report the language they viewed this content in. While slightly over half of them reported watching the two in Hindi, slightly less than half said that they watch films and serials in non-Hindi regional languages, mostly their mother tongue. The English language was hardly mentioned. Around one in five people in non-

Hindi speaking states (all combined) reported watching films and serials in Hindi mostly. This is mostly due to the non-Hindi linguistic states of Gujarat, Maharashtra and Punjab where a sizeable proportion (though not a majority) reported watching films and serials in Hindi. In all the Southern states, viewing of Hindi films and dramas is extremely rare and regional languages dominate.

NEWSPAPER READERSHIP

2.16: Half of all Indians don't read the newspaper; only one in seven read it daily

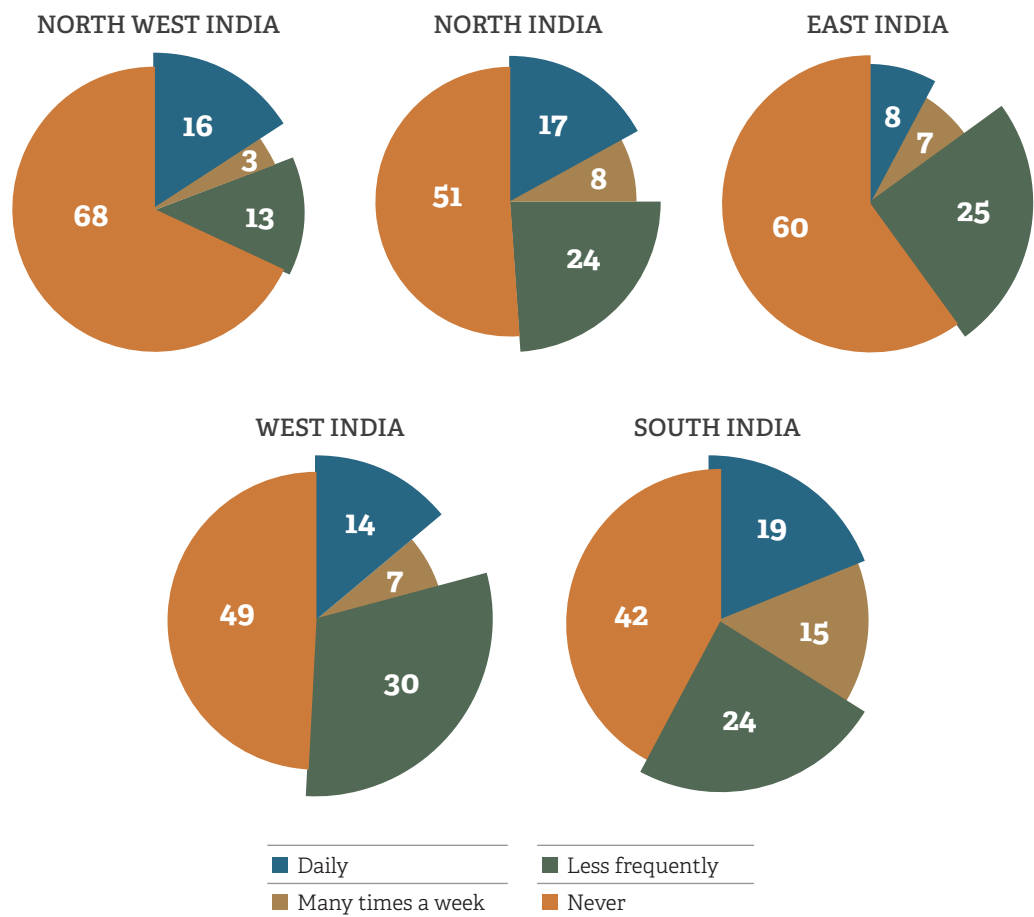


2.16: The survey found that a little over half (52%) of all Indians never read the newspaper. Among those who do read the paper, doing so seems to be more irregular than regular. Only 14% of all respondents reported reading the newspaper daily and 9% many times a week. About a quarter reads the newspaper occasionally. Not

surprisingly, the practice of reading the newspaper daily or weekly was far greater among respondents belonging to households that get newspapers at home on a regular basis. However as pointed out in Section 1, only one-fourth of Indian households get a newspaper at home either daily or often.

2.17: Like TV watching, newspaper reading is most prevalent in South India

READ THE NEWSPAPER



2.17: A majority of citizens in North West India, East India and North India do not read the newspaper at all. Newspaper reading is most prevalent in South India where a third (34%) of citizens read the newspaper either daily or many times a week. West

India does not fare too badly either, although newspaper readership there is irregular. As far as state-specific trends are concerned, the tendency to read the newspaper daily was found to be strongest in Kerala followed by Rajasthan, Karnataka and Tamil Nadu.

2.18: Who reads the newspaper, how regularly and who doesn't?

	Daily	Many times a week	Less frequently	Never
Location type				
Villages	10	6	24	59
Towns	23	13	23	41
Cities	19	11	30	40
Big cities	28	15	25	32
Age group				
15-17	11	11	37	41
18-25	18	13	33	37
26-35	15	9	29	46
36-45	14	9	25	52
46-55	12	8	20	60
56+	14	5	15	66
Gender				
Women	10	6	19	64
Men	18	10	30	41
Economic class				
Poor	5	4	18	73
Lower Class	8	7	25	60
Middle Class	18	11	29	42
Upper Class	37	14	26	24
Education				
Non-literate*	1	1	8	90
Primary school	6	4	20	70
Middle pass	9	8	30	53
High school	18	13	34	35
College and above	36	14	31	19

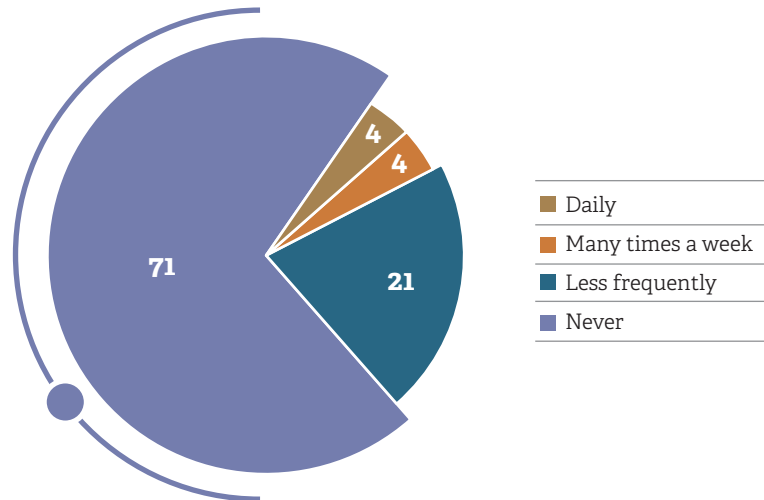
*Question wording was - how often do you read the newspaper or get it read out by someone?

2.18: Newspaper reading is more common in urban areas, among 15-25 year olds, men, upper classes and the highly educated. College educated and upper class citizens are more than twice as likely to read the newspaper regularly compared to the average citizen. That said, it is interesting that half of the

college educated citizens either read the newspaper rarely or never read it. The elderly, women, village dwellers, poor, non-literate and barely literate citizens are, predictably, the least likely to read the newspaper or get it read out by someone.

RADIO LISTENERSHIP

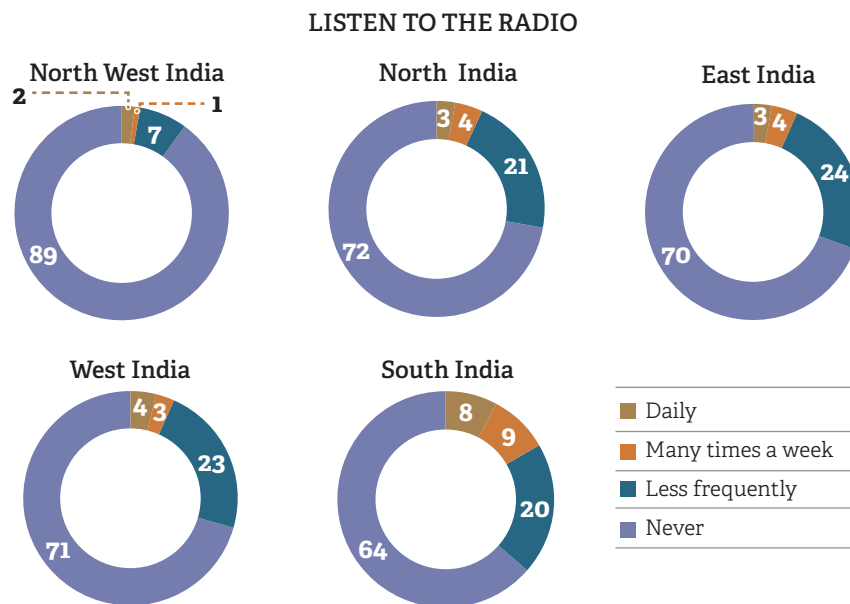
2.19: Hardly anyone listens to the radio regularly; most of those who listen to it are rare listeners



2.19: Radio, once a vital source of mass communication, seems to have lost its appeal in a major way. Only 4% Indians

listen to it daily; seven out of Indians never listen to it.

2.20: Radio listening is relatively less unpopular in South India compared to other regions



2.20: Compared to other regions, South India has the highest proportion of radio listeners (36%). Only one in ten respondents from North West India

listens to the radio. In other regions the proportion is around one-fourth to one-thirds.

2.21: Who listens to the radio and who doesn't?

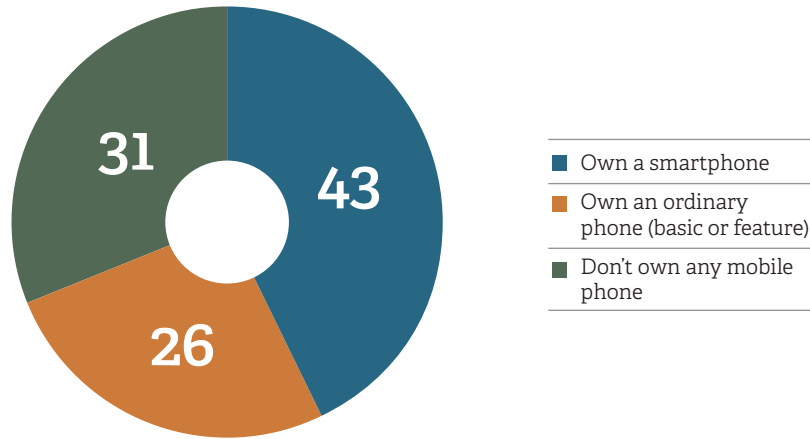
	Daily	Many times a week	Less frequently	Never
Location type				
Villages	4	4	19	73
Towns	6	6	22	66
Cities	3	5	25	66
Big cities	6	5	26	63
Age group				
15-17	4	6	20	70
18-25	5	5	22	67
26-35	4	5	22	68
36-45	4	4	20	71
46-55	3	3	22	71
56+	4	3	19	75
Gender				
Women	4	4	18	74
Men	5	5	23	67
Economic class				
Poor	2	3	18	78
Lower Class	3	4	19	74
Middle Class	6	5	22	68
Upper Class	7	6	27	60
Education				
Non-literate	2	2	14	83
Primary school	2	3	18	76
Middle pass	3	4	21	72
High school	5	6	25	64
College and above	7	7	24	62

2.21: Radio has long been considered as a cheap and easy source of entertainment and information. One would therefore imagine that radio listenership would be high in rural areas, among the poor and the less educated. However the survey data points to the contrary. People in villages, less educated and less well off

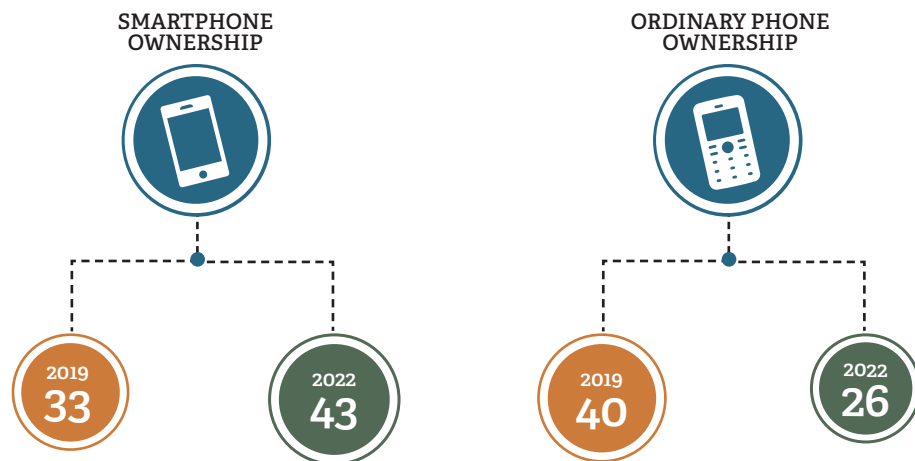
people are far less likely to listen to the radio than urban, economically secure and better educated citizens. The fact that private FM radio stations have been dominating the radio landscape for quite some time now and have been catering mostly to urban and young audiences might be one reason for this.

MOBILE PHONE OWNERSHIP

2.22: Seven out of 10 Indians aged 15+ own a mobile phone - 43% have a smart one, 26% ordinary



2.23: Big transformation in type of mobile phone owned during last 3 years (Data shown for 18+ citizens in order to compare strictly)

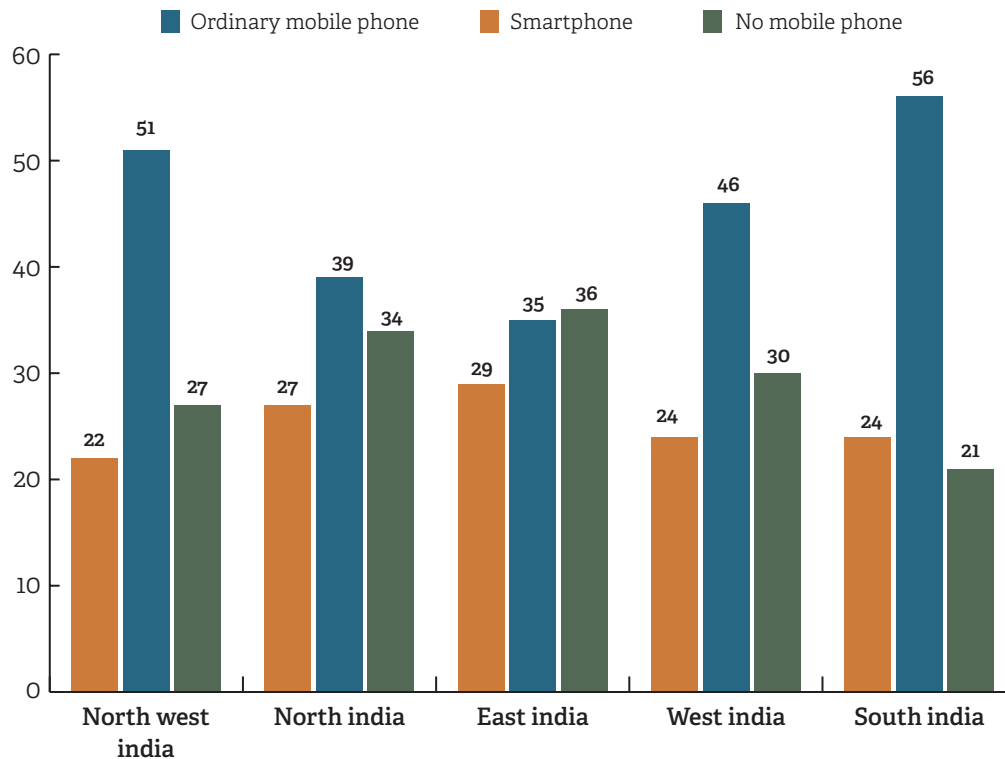


Source for 2019: NES 2019 (2 rounds merged). Question wordings in 2019 and 2022 were slightly different. In 2022, respondents were asked if they owned a mobile phone that only they used mostly, and if they did, then what kind was it. In 2019, respondents were simply asked about what kind of mobile phone they had and not whether they were the only ones using it.

2.23: Even as the proportion of individuals owning a mobile phone remains more or less the same compared to 2019, there has been a huge shift from ordinary phones to smartphones. In 2019, more people

aged 18 and above owned an ordinary phone compared to those that owned smartphones. Now, there are more smartphone owners than ordinary phone owners. The pandemic and lockdowns may have contributed to this shift.

2.24: Mobile/smartphone ownership highest in South India and lowest in East and North



2.24: Even though households in North West India are more likely to have at least one smartphone-owning member at home than those in South India (as highlighted in section 1 of the report), when it comes to individual-level ownership of smartphones it lags behind South India. This is mostly on account of fewer women owning smartphones of their own in the region as

compared to South India. Many women in North West India reported that they themselves don't own a smartphone but some other family member at home does. This trend was also observed in West India. In South India on the other hand, a large chunk of the respondents who reported not owning a smartphone of their own also reported that no one else in their household has one too.

2.25: The digital divide: ownership of mobile phones/smartphones among key socio-demographics

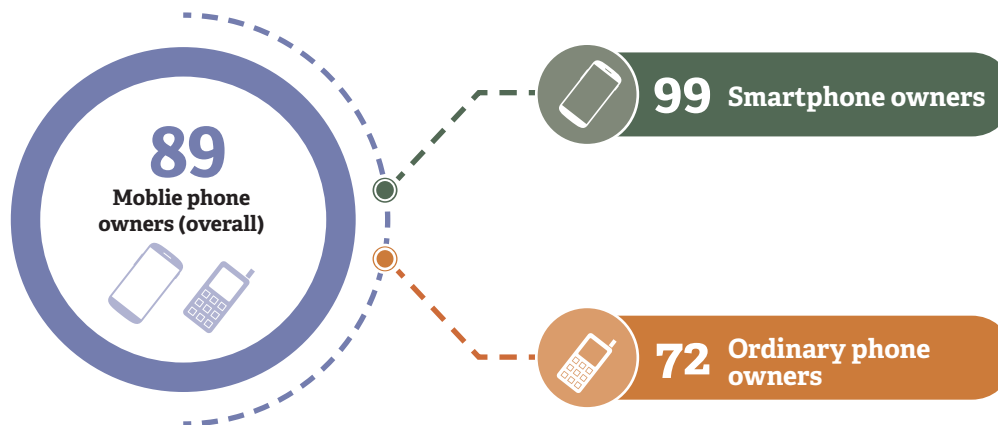
	Ordinary phone	Smartphone	No phone
Location type			
Villages	28	37	35
Towns	27	50	23
Cities	22	59	19
Big cities	17	63	19

	Ordinary phone	Smartphone	No phone
Age group			
15-17	6	60	33
18-25	13	74	14
26-35	21	62	17
36-45	35	41	25
46-55	34	27	39
56+	32	13	55
Gender			
Women	24	32	44
Men	28	54	18
Economic class			
Poor	30	19	51
Lower Class	30	32	38
Middle Class	24	55	21
Upper Class	15	80	6
Education			
Non-literate	26	5	69
Primary school	43	16	42
Middle pass	40	33	27
High school	22	64	14
College and above	9	88	3
Caste-community			
Hindu upper	23	55	22
Hindu OBC	27	43	30
Hindu Dalit	29	36	35
Hindu Adivasi	23	32	45
Muslim	29	38	32
Other minorities	24	51	25

2.25: Although there is no doubt that access to mobile phones among people has grown tremendously over the years, the digital divide is still very real. The increased access to mobile phones may have made it less sharp, but it still exists. Mobile phone usage/ownership is still low among the elderly, poor, the non-literate and rural citizens. It is also low among women. Although more women now own a mobile phone than those who don't (which was not the case earlier), they are still far behind men

in their access to a phone, particularly smartphones. As far as castes and communities are concerned, Adivasi citizens are least likely to own a mobile phone or a smartphone. Dalits don't fare all that well on this count either. Hindu upper castes on the other hand are the most likely to own a mobile phone. Since mobile phones have become access points to various government schemes and services, these divides with respect to ownership of phones, particularly smartphones, are significant.

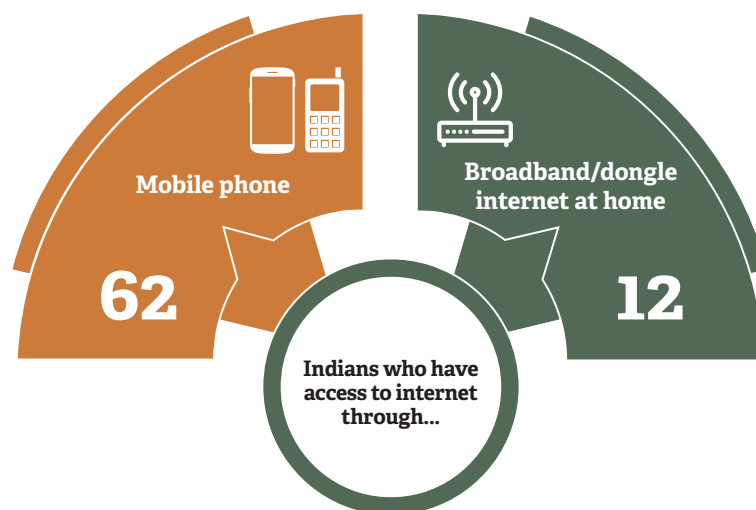
2.26: Proportion of phone owners having Internet on their phone



2.26: Nine out of ten mobile phone owners reported access to the internet on their mobile phone; in the case of smartphone owners, internet access was nearly cent percent. Well over two-thirds of ordinary phone owners reported having internet on their phone

indicating that most ordinary phone owners are those who have a feature phone (that allows them internet access) as opposed to a basic one (that only allows for making calls and sending and receiving text messages).

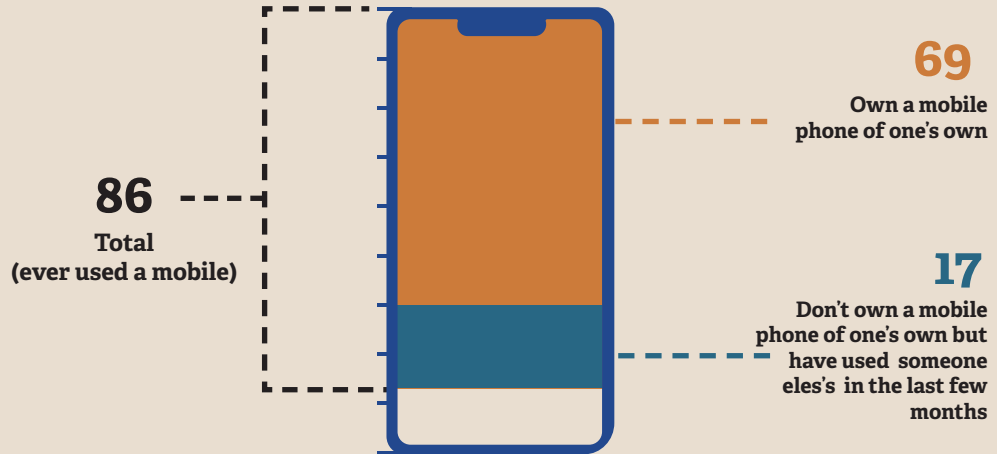
2.27: Internet access for most Indians is through their mobile phone; very few have separate net connection at home



2.27: Three-fifths of Indians have access to the internet through their mobile phones, and only an eighth has internet access at home through broadband connection/dongle. This means that most internet consumption in India is happening through mobile phones. Overall, the survey found that 66% of

Indians have access to the internet or used it in some form (via mobile phone/connection at home/dongle/hotspot or some other means), and 38% of Indians use the internet actively (i.e., they had used it for some activity in the 1-2 months preceding the survey).

2.28 There are still 14% citizens who haven't used a mobile phone yet, not even someone else's

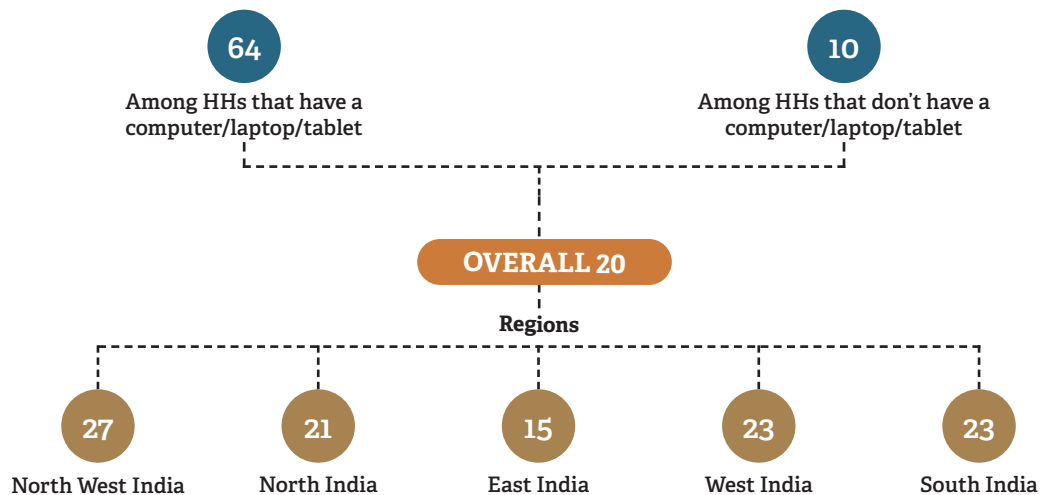


2.28: Among the 31% who don't have a mobile phone, 56% have used a mobile phone of someone else (family member, friend etc.) leaving 44% that have not. So if we combine mobile

phone owners and non-mobile phone owners who have used a mobile phone, we find that overall 86% of Indians have used a mobile phone thus far and 14% have not.

2.29: Computer/laptop/tablet usage in India

Used a computer/laptop/tablet at home or outside at least once so far



2.29: While most Indians use/have used a mobile phone, most have never used a computer/laptop/tablet. Only one in five respondents in the 19 States where the survey was conducted reported that they had personally used a computer/laptop/tablet at some point in their life.

Moreover, there are many (about one-third) who haven't yet used a computer/laptop/tablet despite their household owning one/household member having one. Computer usage was found to be quite low across all regions of India with East India faring the worst.

2.30: Computer/laptop/tablet usage among key socio-demographics

Used a computer/laptop/tablet at home or outside at least once so far	
Location type	
Villages	14
Towns	27
Cities	35
Big cities	38
Age group	
15-17	43
18-25	46
26-35	27
36-45	13
46-55	9
56+	4
Gender	
Women	15
Men	25
Economic class	
Poor	8
Lower Class	13
Middle Class	25
Upper Class	45
Education	
Non-literate	1
Primary school	2
Middle pass	9
High school	25
College and above	60

2.30: Computer/laptop/tablet usage is determined by urbanity, age, education, economic class and gender. It was found to be the greatest among city-dwellers, the young, the educated, the rich, and among men. More than any other socio-demographic variable, education seems to be making the greatest difference to computer usage. It was over twice as high among the college educated (60%) as among high school educated (25%).

Moreover, it was virtually non-existent among the non-literate and primary educated (1% and 2%, respectively). Age, class and urbanity were also found to be strong determinants. For instance, those aged between 15 and 25 years are ten times more likely to have used a computer/laptop/tablet than those aged above 55 years. Similarly the richest are six times more likely to have used one than the poorest.

SMARTPHONE ACTIVITIES

2.31: What are smartphone users using their smartphone for other than making phone calls, and how frequently?

(Activities are arranged in descending order based on the 'Quite a lot' percentage)

	Quite a lot	Somewhat	Very little	Never
Sending/reading messages	28	35	24	14
Listening to music/songs	26	39	17	18
Using social media	25	34	15	26
Taking selfies	24	36	23	18
Watching or reading news	21	34	22	23
Video calling	21	33	32	14
Watching films, serials, vlogs, videos	21	31	20	28
Taking photographs of things, people, places	19	33	24	24
Studying or attending online classes	19	18	13	50
Banking or paying bills	16	24	18	42
Finding out directions, locations, routes or travel time	13	24	22	41
Buying things or ordering food or booking something	12	23	19	46
Playing video games	10	15	19	55
Watching an OTT platform	8	16	16	60

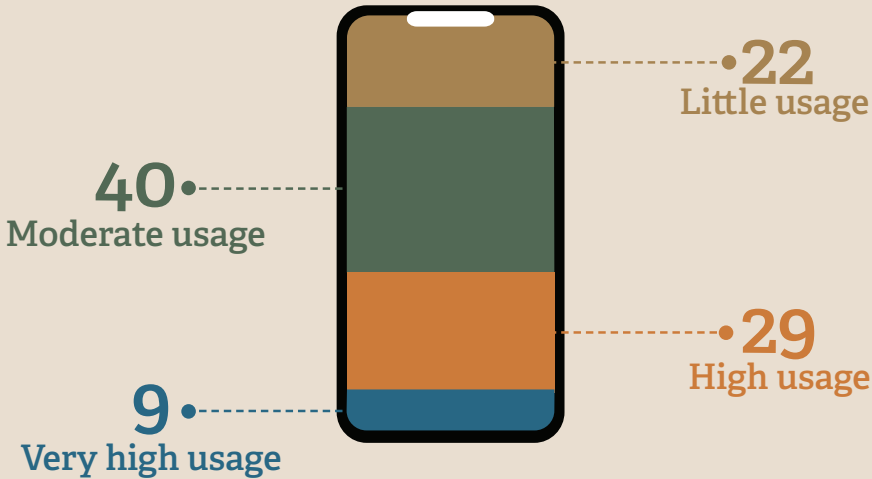
2.31: Other than making phone calls, the top 5 regular activities of smartphone users are sending/reading messages,

listening to music, using social media, taking selfies and reading and watching news.

2.32: What are smartphone users from different age groups doing on their smartphone? (Top five activities done by each age group has been colour coded from darkest to lightest shade)

	15-17	18-25	26-35	36-45	46-55	56+
Sending/reading messages or SMSs	73	71	64	56	54	40
Video calling	66	60	56	50	43	42
Playing video games	56	33	22	15	14	16
Watching films, serials, vlogs, videos	67	63	54	44	34	32
Watching an OTT platform	29	32	25	18	16	13
Using social media	72	70	60	52	42	31
Watching or reading news	50	60	58	52	49	45
Taking selfies	79	71	61	55	40	30
Taking photographs of things, people, places	68	62	52	45	35	35
Banking or paying bills	28	47	44	39	31	27
Listening to music/songs	79	77	67	55	48	45
Buying things or ordering food or booking something	40	46	37	32	20	20
Finding out directions, locations, routes or travel time	45	50	40	31	21	22
For studying or attending online classes	72	59	30	22	18	16

2.33: Index of intensity of smartphone usage (excludes phone calling)



2.33: Based on the 14 activities shown in Figure 2.31, we constructed a summated index to learn the intensity of smartphone usage among smartphone users. According to the index (see Appendix for

details), one in ten are hyperactive on the smartphone (they are very high in their usage of it), three in ten are highly active, two-fifths are moderately active and one in five use their smartphones very little.

2.34: Who uses their smartphone a lot and who doesn't?

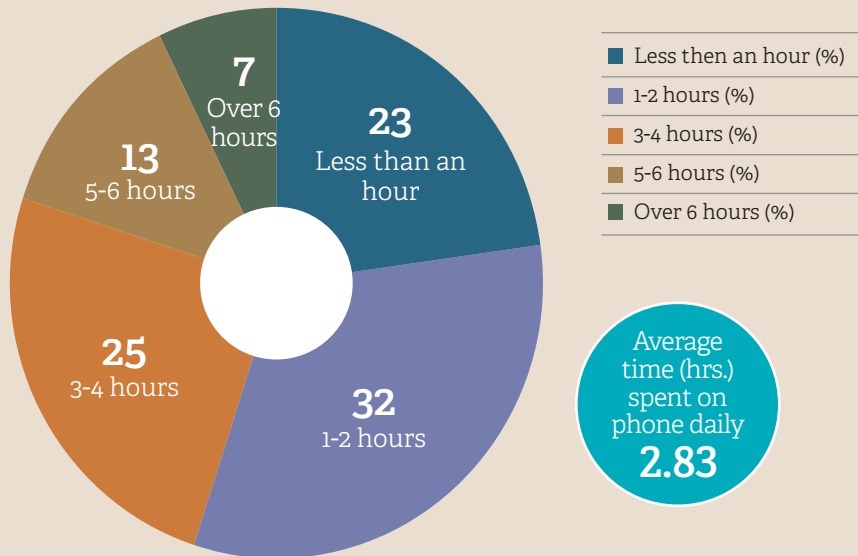
	Very high usage	High usage	Moderate usage	Little usage
Location type				
Villages	8	25	43	24
Towns	11	30	39	20
Cities	11	32	34	23
Big cities	12	38	35	14
Age group				
15-17	16	38	37	8
18-25	15	40	35	10
26-35	8	29	43	19
36-45	5	21	43	30
46-55	4	16	38	43
56+	3	11	37	49
Gender				
Women	8	26	43	23
Men	10	30	38	22
Economic class				
Poor	9	22	37	31
Lower Class	9	24	40	27
Middle Class	9	30	41	20
Upper Class	10	33	40	18
Education				
Non-literate	--	8	24	68
Primary school	3	10	40	48
Middle pass	5	14	42	39
High school	9	26	44	21
College and above	13	40	36	11
Caste-community				
Hindu upper	11	31	36	22
Hindu OBC	10	28	42	20
Hindu Dalit	7	28	41	24
Hindu Adivasi	10	25	45	20
Muslim	6	29	44	21
Other minorities	7	23	33	37

2.34: Even though there is a gender gap with respect to smartphone ownership, this gap does not exist in the realm of usage. If a woman owns a smartphone, she is nearly as likely to use it as a man with a smartphone, although the intensity of usage differs. The same trend can be seen with respect to caste

and community. There isn't much of a difference between Adivasi and Dalit Hindus on the one hand and upper caste Hindus on the other as far as usage of smartphones is concerned. The difference is only with respect to intensity of usage and access to a smartphone (see Figure 2.25).

GAUGING MOBILE ADDICTION

2.35: Time spent on mobile phone daily by mobile phone users

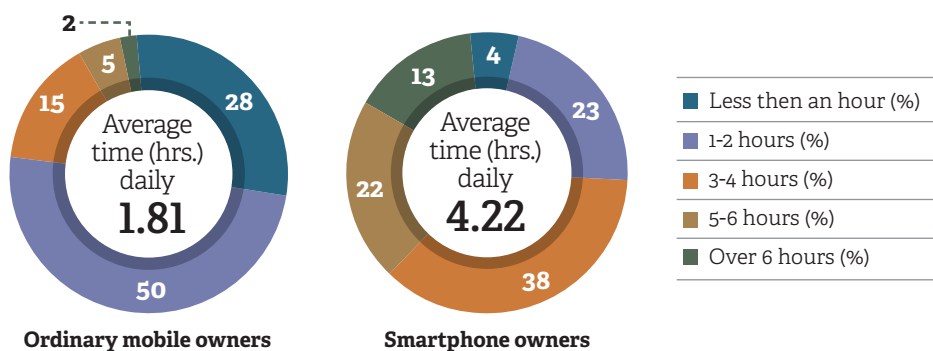


2.35: Over two-fifths (45%) of mobile phone users (including both owners of phones and non-owners who have used someone else's) claimed that they are spending over 3 hours daily with their mobile phones.

Average time spent by mobile users on their phone daily is 2.83 hours which is nearly the same as the average time spent watching TV daily by daily viewers of TV (see Figure 2.4).

2.36: Not surprisingly, smartphone owners are more likely to spend more time on phone than ordinary phone owners

Time spent on mobile phone daily

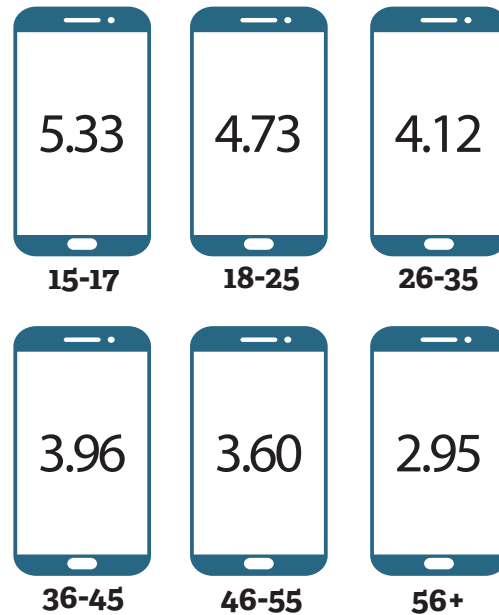


2.36: An average smartphone owner spends 4+ hours per day on their smartphone. Moreover, those with

smartphones spend twice as much time on their phone than those with ordinary mobile phones.

2.37: Young smartphone owners are spending a lot of time on their smartphones daily

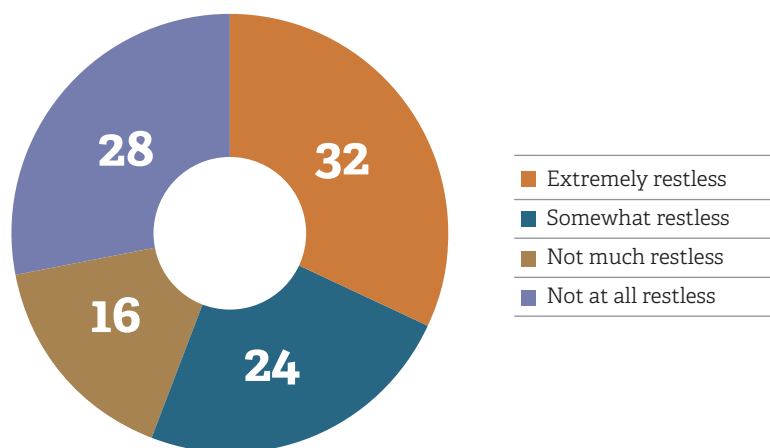
Average time spent on smartphone daily (hours) by different age groups



2.37: On an average 15-25-year-old smartphone owners are spending around 5 hours daily on smartphones.

Even the elderly smartphone owners spend quite a lot of time on their smartphones – around 3 hours everyday.

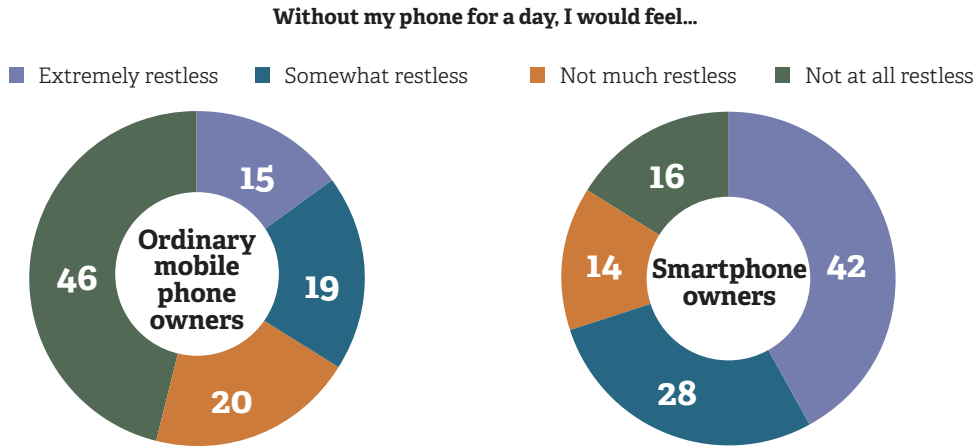
2.38: How restless would mobile phone owners feel without their phone for a day?



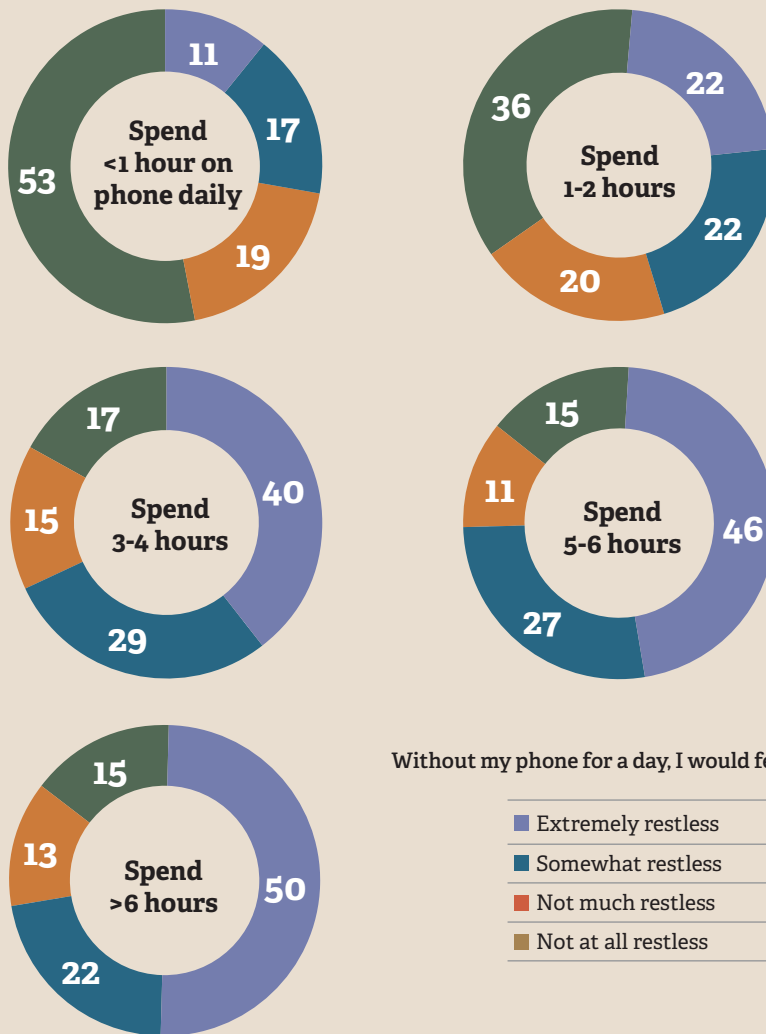
2.38: One third of mobile phone owners reported that they would feel extremely restless if their phone was taken away from them for a day and another one-

fourth would feel somewhat restless. This is far greater than the proportion that had said the same for absence of TV for a day.

2.39: Among smartphone owners the restlessness without the smartphone would be even greater

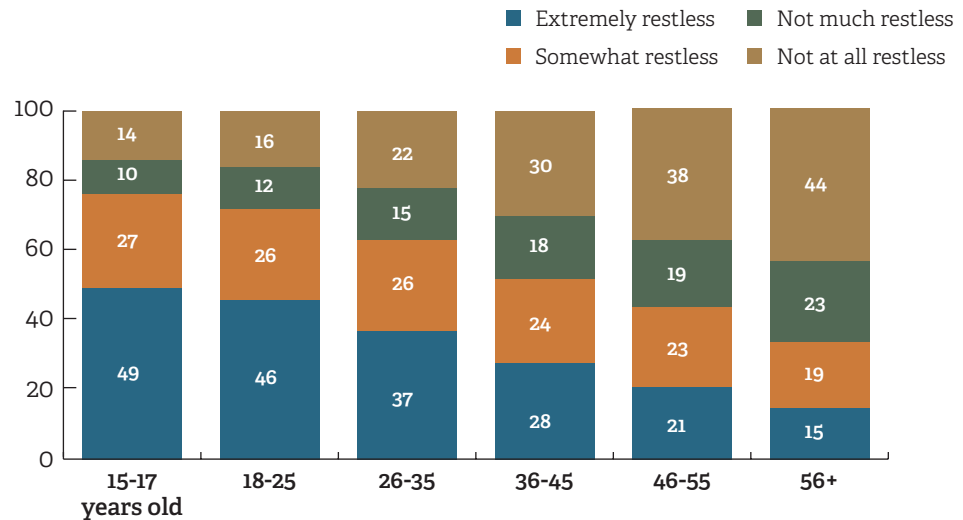


2.40: Not surprisingly, the greater the time spent on the mobile phone, the more the likelihood to feel restless without it



2.41: Young and restless without phone

Without my phone for a day, I would feel...

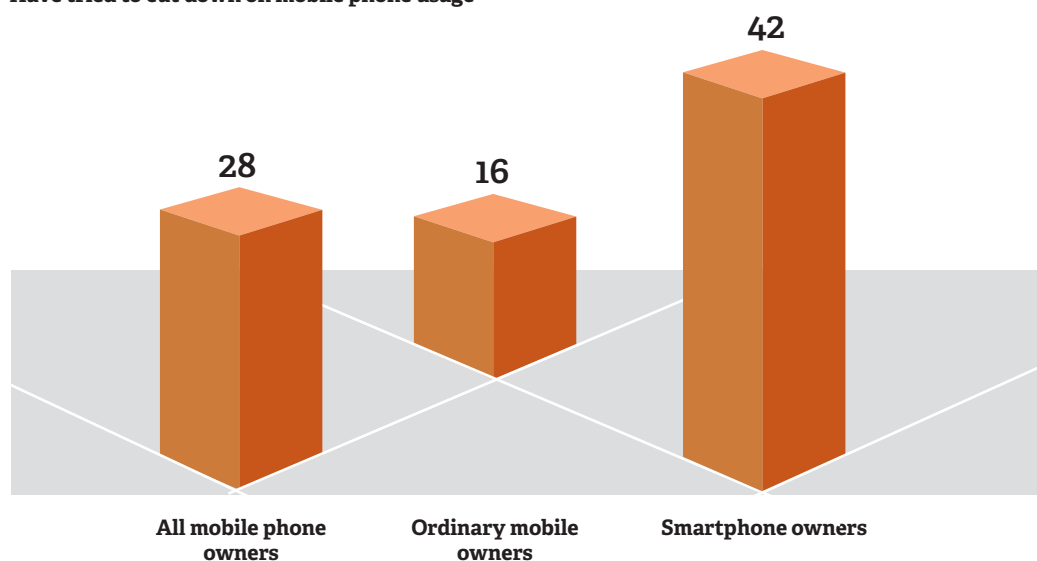


2.41: Young (15-25 years old) owners of mobile phones are more likely to feel restless without it than middle aged and older age groups. We also find that this is irrespective of the intensity of their mobile usage or the time they spend on

their phones daily. In other words, even youngsters spending less time on their mobile phone daily or using their phones very little are more likely to feel restless without it than their older counterparts with the same proclivities.

2.42: Attempts at reducing mobile time

Have tried to cut down on mobile phone usage

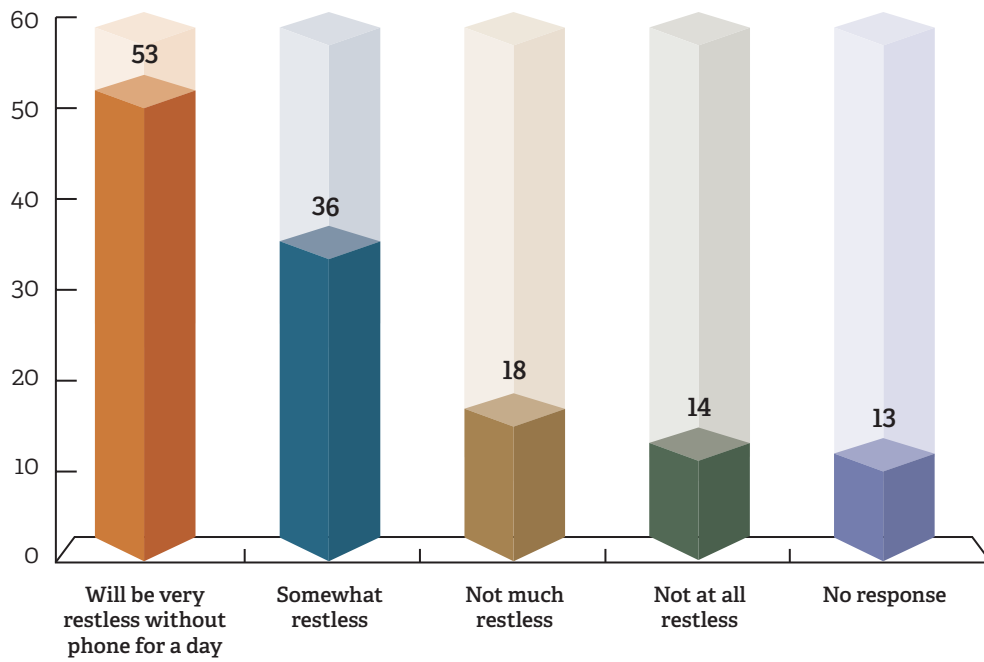


2.42: Over a quarter of all mobile phone users and two-fifths of smartphone users have tried to cut down their phone

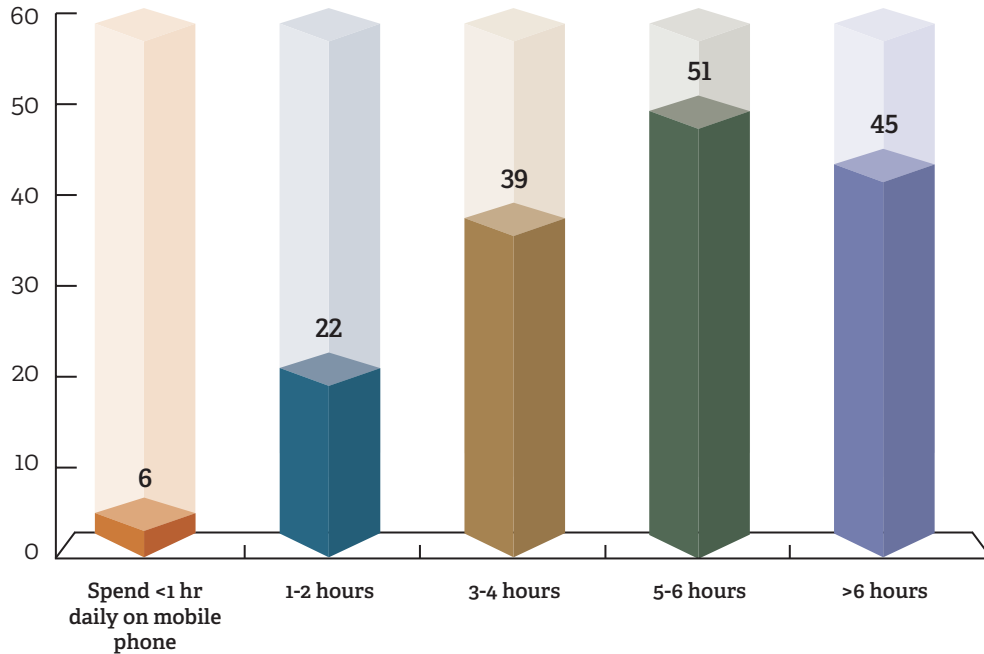
usage because they thought they were spending too much time on it

2.43: Many of those who are highly addicted to their phone or spend a lot of time on it have tried to cut down their phone usage

Have tried to cut down on mobile phone usage



Have tried to cut down on mobile phone usage



3

SOCIAL MEDIA: ENGAGEMENT AND PARTICIPATION

INTRODUCTION

The Internet, when it became available to the public in the 1990s was confined to search engines, emails, chat rooms and surfing for news and information. However, the arrival of social media platforms on the internet about a decade or so later started changing the priorities and activities of internet users and eventually resulted in a major shift in user behaviour. Unlike the mid-2000s when social media was still very new, most activity on the internet today is happening on social media and messaging platforms. It would not be an exaggeration to say that it is social media that dominates the internet today more than any other service. Conceived of as simply a means of interaction and entertainment, social media and messaging platforms such as Facebook, Twitter, YouTube, Instagram, WhatsApp etc. play an integral part in many of their users' daily lives; allowing them to not just express themselves, instantly communicate

and network with others and to get instant news and information, but also to earn money and promote their businesses. Moreover, even though social media platforms and the corporations that own them have attracted controversy for overlooking privacy issues and for failing to conform to ethical standards, it does not seem to have affected the number of users. In India, starting from the 2014 Lok Sabha elections when social media was used quite extensively for electioneering for the first time, Lokniti-CSDS has been asking questions in all its election surveys on the usage of various social media platforms. These questions allow us to not only analyze the relationship, if any, between social media usage and voting preferences, but to also track the growth of social media platforms, the frequency of their usage and to study the profile of their users. The present Media survey seeks to provide fresh data on the matter and to also understand some allied issues that have yet not been explored.

POPULARITY OF VARIOUS SOCIAL MEDIA

3.1: Usage of various social media and messaging platforms among 15+ citizens

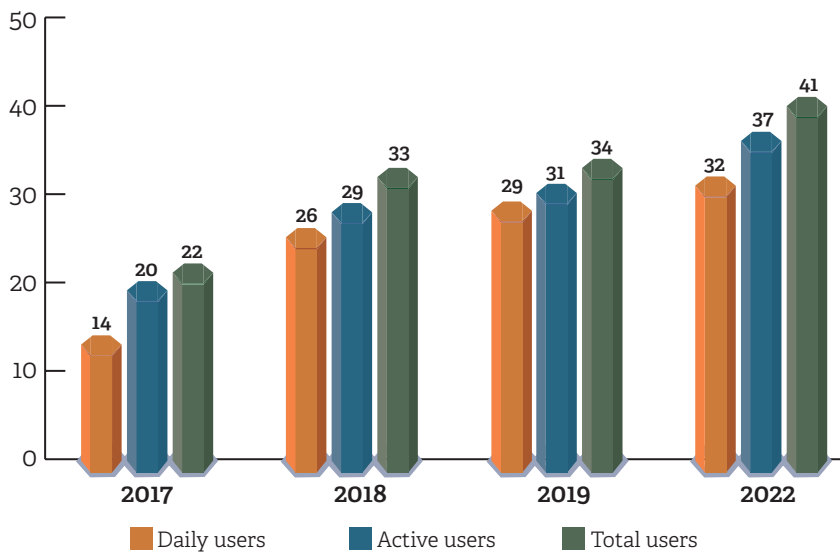
	Many times a day	Once or twice a day	Many times a week	Once or twice a week	Very little	Never
WhatsApp	25	9	3	2	4	57
YouTube	17	10	6	3	5	59
Facebook	13	10	5	3	6	63
Instagram	9	6	4	4	6	71
Telegram	5	5	4	3	5	78
TikTok (pre-ban)	5	3	4	3	4	81
Twitter	3	3	3	3	7	81
Snapchat	3	3	3	2	5	84
Koo	1	2	1	2	4	90
Clubhouse	1	1	1	2	4	91
LinkedIn	1	1	2	2	4	90
Signal	1	1	2	2	5	89
Tinder, Bumble etc.	1	1	2	2	5	89
Some other app*	2	2	2	2	5	87

Note: Figures shown here and in the other tables/charts in this section are percentages, unless specified otherwise. *App names read out here were ShareChat, Chingari, Roposo, Mitron, Bolo Indya, Public App, Josh, Taka Tak, Moj and Triller.

3.1: Amongst the various social media platforms that exist today, WhatsApp and YouTube are the most used; over two-fifths of Indians older than 15 use them with varying degrees of regularity. As far as daily usage of the two platforms is concerned, about one-third use WhatsApp everyday and a little over one-fourth use YouTube daily. As for other social media platforms, a little less than a quarter of those surveyed use Facebook everyday and about one-sixth use Instagram daily. Telegram (launched in 2013) comes next with one-tenth

using it daily. Twitter, which has been in existence for a decade and a half now, is the sixth most used social media in India with its daily usage being quite low at only 6%. There are still a significant number of people in India who do not use social media platforms at all even though they have been available for over a decade now. For instance, WhatsApp, despite being the most popular platform of all, is still not used by nearly three-fifths of the population. This gap exists largely due to a lack of access to smartphones.

3.2A: WhatsApp usage among 18+ citizens: steady growth since 2017



Source: Lokniti-CSDS national surveys

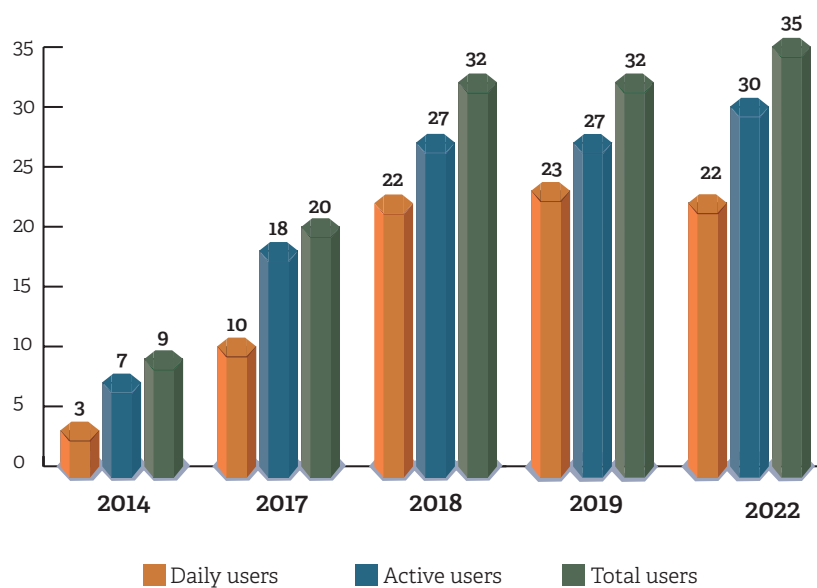
Note: WhatsApp usage question wasn't asked in 2014. The active users are those who use the platform daily or weekly.

In order to compare with the past surveys, the 2022 figures shown here and in 3.2b, 3.2c, 3.2d and 3.2e are also for 18+ citizens, and not 15+ citizens.

3.2a: The usage of WhatsApp has seen a steady growth during the last five years. In 2017, one-fifth of Indians aged 18 and above was using WhatsApp. This increased to one-third in 2018 and 2019,

and further to two-fifths at the start of 2022. The proportion of daily users of WhatsApp has also more than doubled in the same period – it was 14% five years ago and is around 32% now.

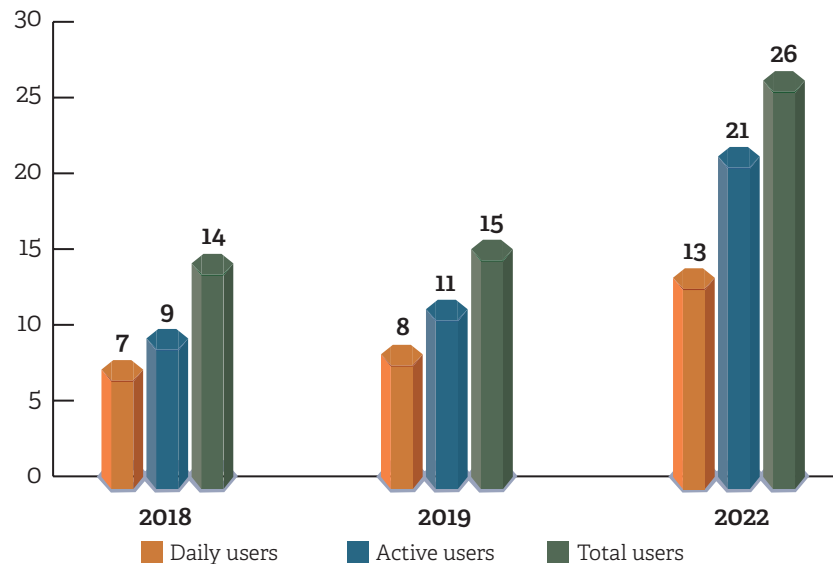
3.2B: Facebook usage among 18+ citizens: after dramatic growth, a slow down



3.2b: In 2014, merely nine percent of adults (18+) in India were using Facebook. However, the following four years saw a dramatic increase in Facebook's user base. In 2017 it was at 20%, and then increased further by 12

points to 32% within a year. But since then Facebook's growth (in terms of usage) seems to have slowed down. It increased by merely three percentage points between 2018 and 2022.

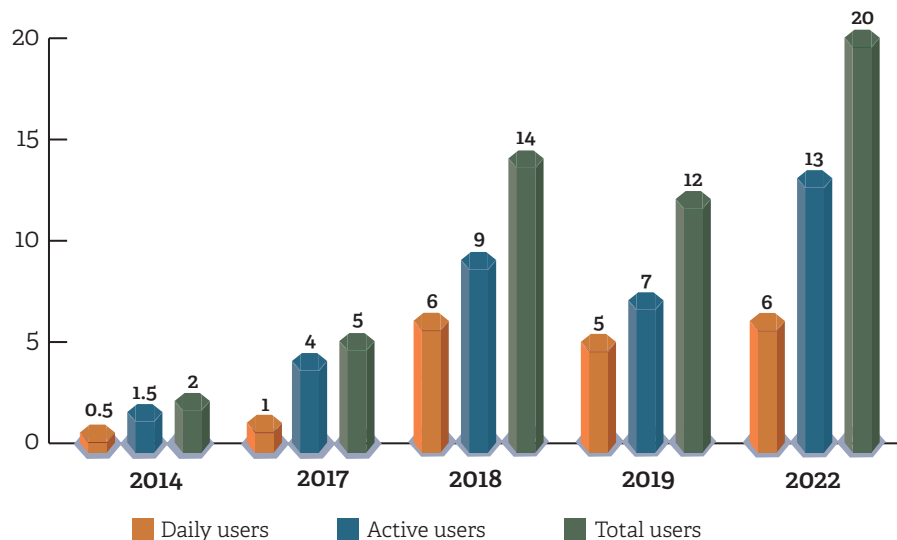
3.2C: Instagram usage among 18+ citizens: sharp increase in last 3 years



3.2c: Instagram, which was purchased by Facebook in 2012, has seen a major increase in users, especially during the last three years. Usage of the platform barely saw any increase between 2018

and 2019 (rising from 14% to 15%) but then shot up dramatically between 2019 and 2022. Instagram usage sits at around 26% right now.

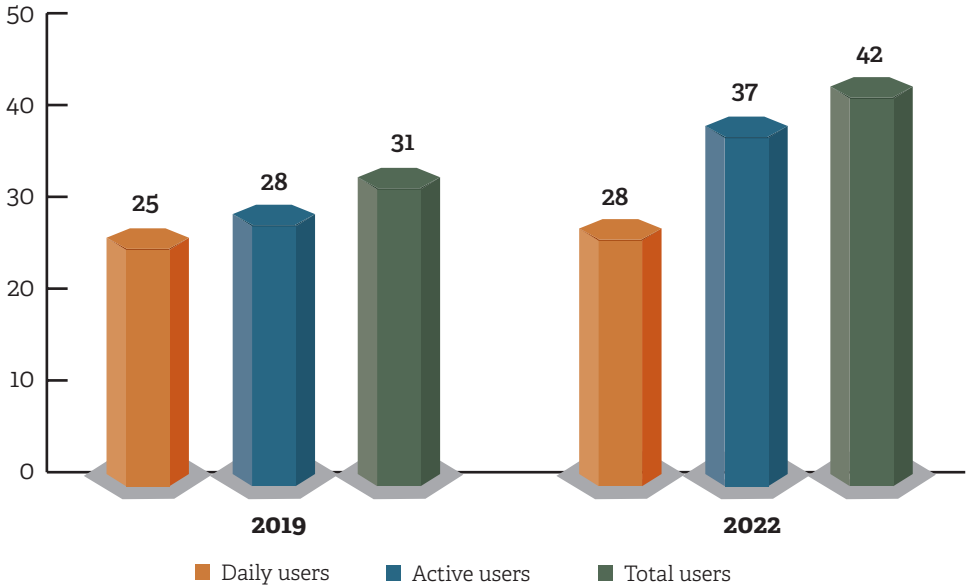
3.2D: Twitter usage among 18+ citizens: growing again after a slowdown



3.2d: Twitter's daily users have stagnated since 2018, however weekly users have increased leading to an increase in active and total users in 2022. Around 6% of adult Indians use Twitter on a daily

basis, 13% use it on a daily or weekly basis, and in total, factoring in infrequent users, around 20% of Indians use the app currently.

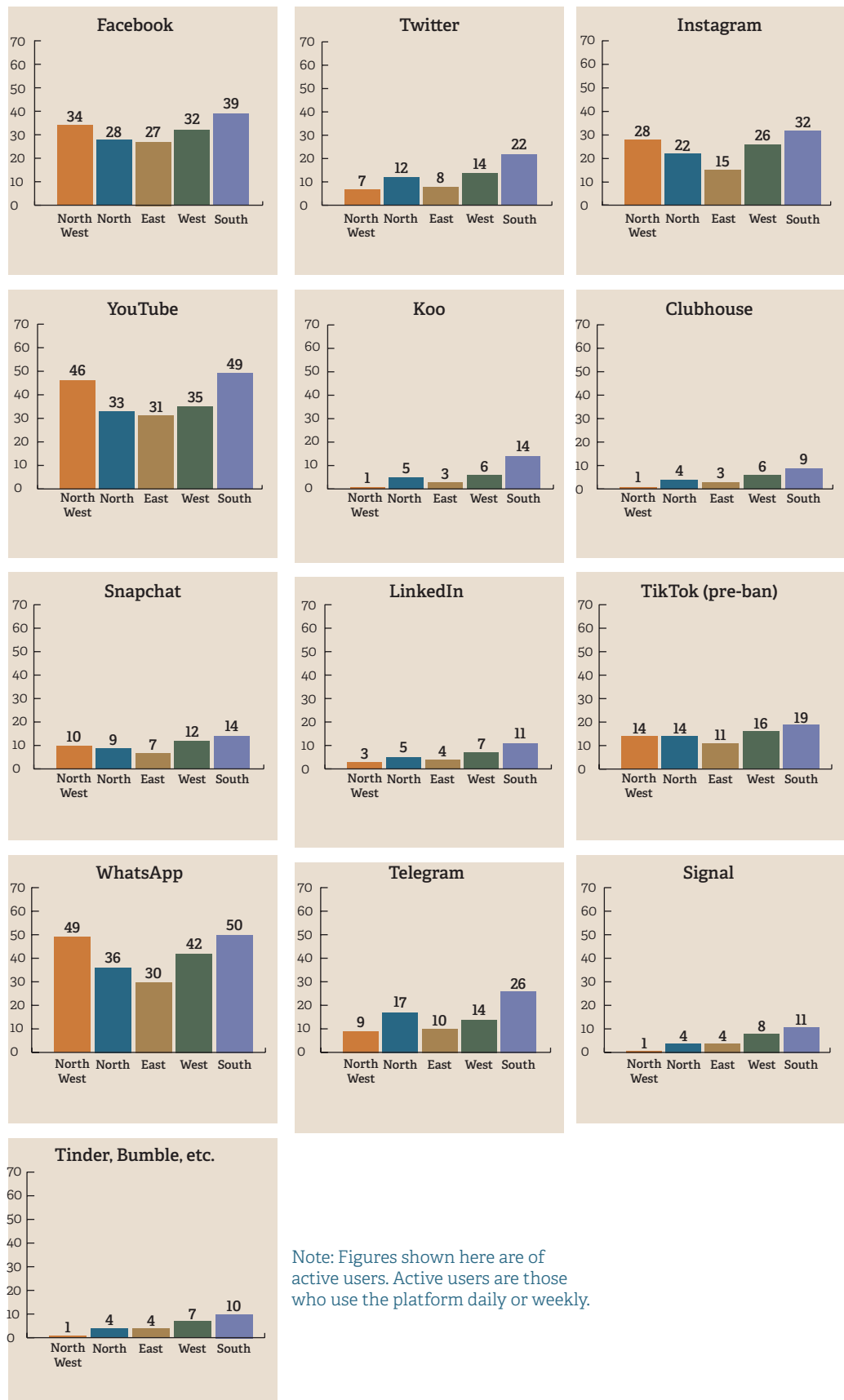
3.2E: YouTube usage among 18+ citizens: growth in active users since 2019



3.2e: Since 2019, Lokniti has started asking about the usage of YouTube in its surveys. The findings suggest that in the past three years, YouTube's daily users haven't grown much. However, the share of the

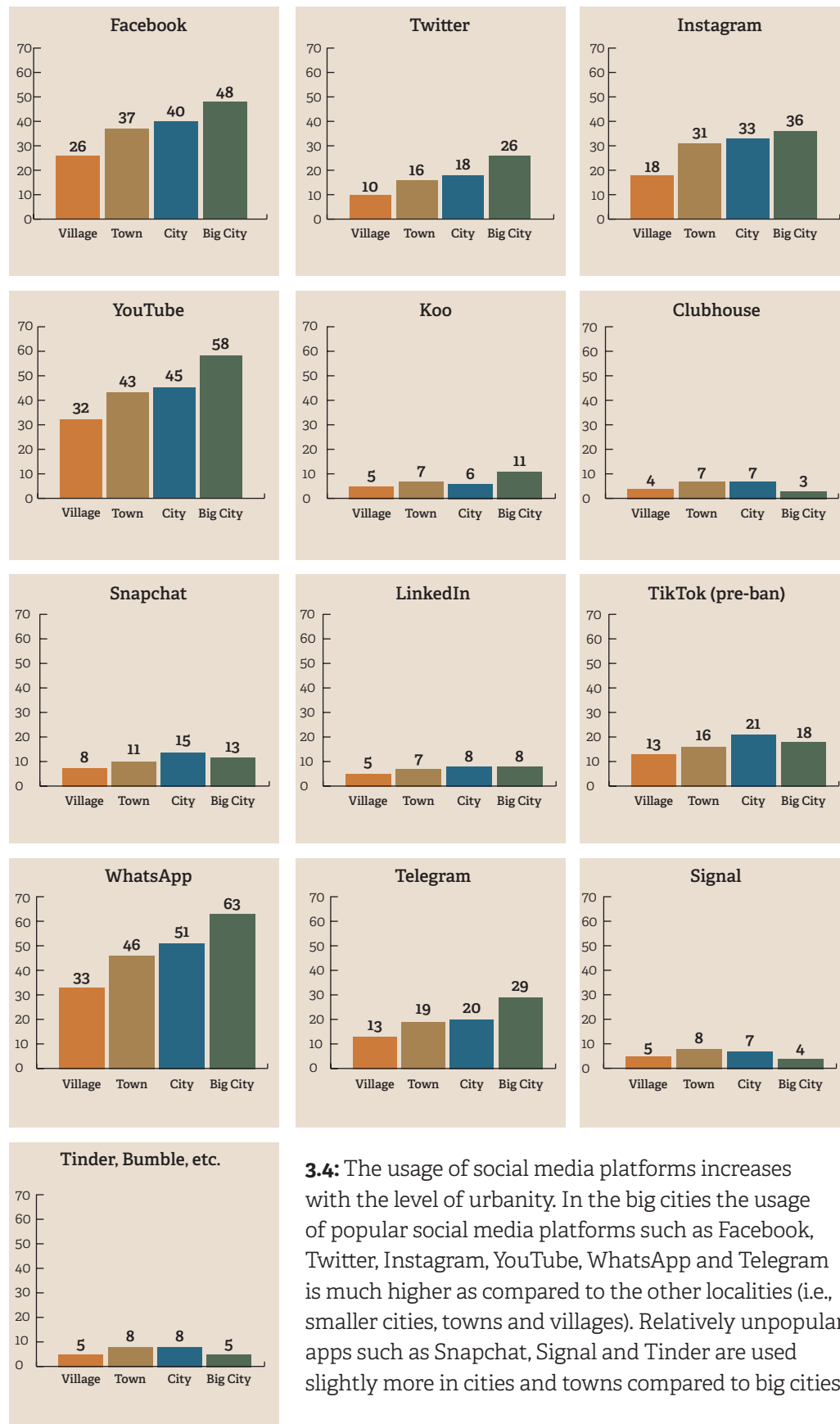
active users (daily and weekly users combined) of YouTube has increased by nine percentage points from 28% in 2018 to 37% in 2022. Total YouTube usage stands at over 40% right now.

3.3: South India leads in 'active' usage of all social media platforms



Note: Figures shown here are of active users. Active users are those who use the platform daily or weekly.

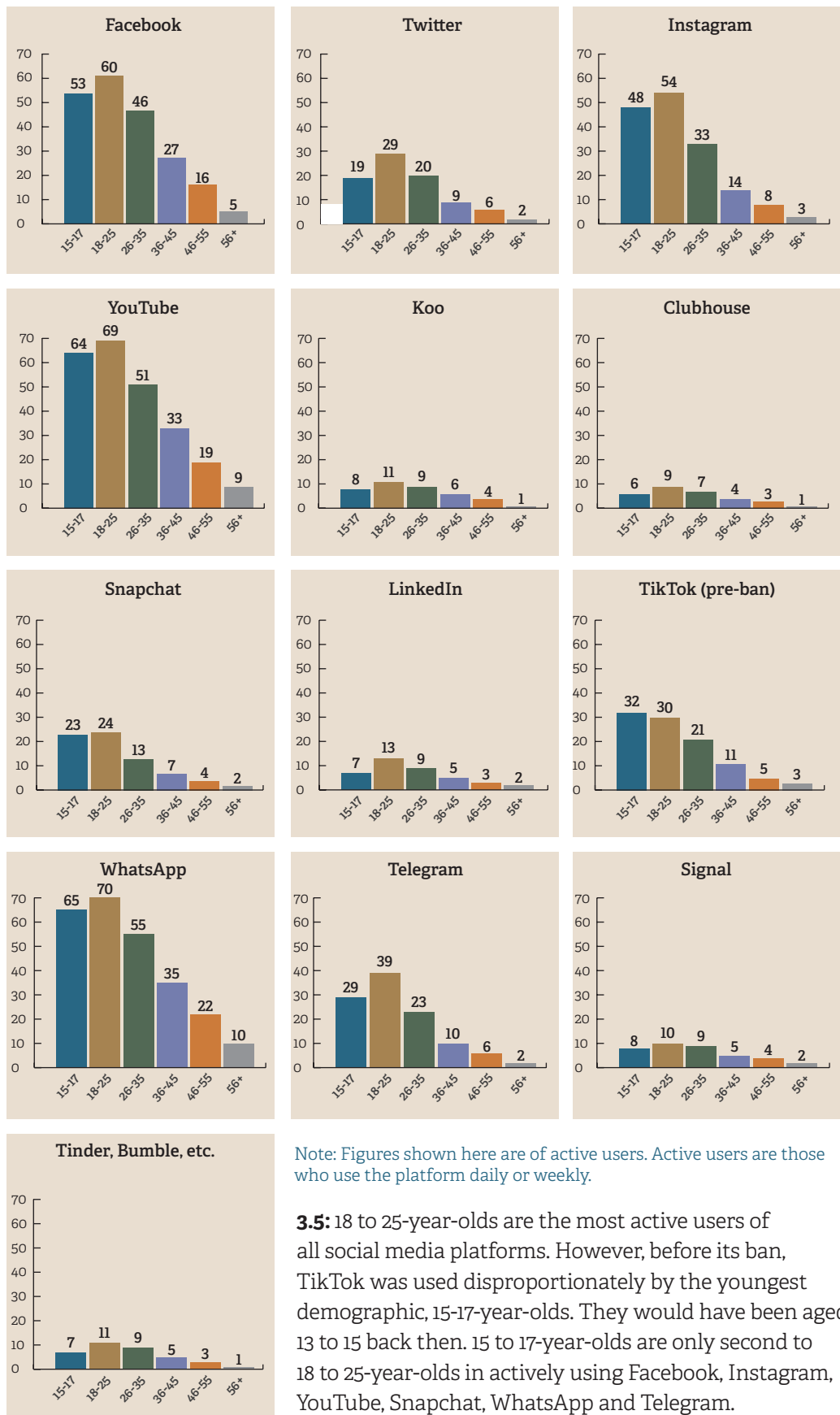
3.4: Active users of social media platforms - by locality



3.4: The usage of social media platforms increases with the level of urbanity. In the big cities the usage of popular social media platforms such as Facebook, Twitter, Instagram, YouTube, WhatsApp and Telegram is much higher as compared to the other localities (i.e., smaller cities, towns and villages). Relatively unpopular apps such as Snapchat, Signal and Tinder are used slightly more in cities and towns compared to big cities.

Note: Figures shown here are of active users. Active users are those who use the platform daily or weekly.

3.5: Active users of social media platforms - by age group

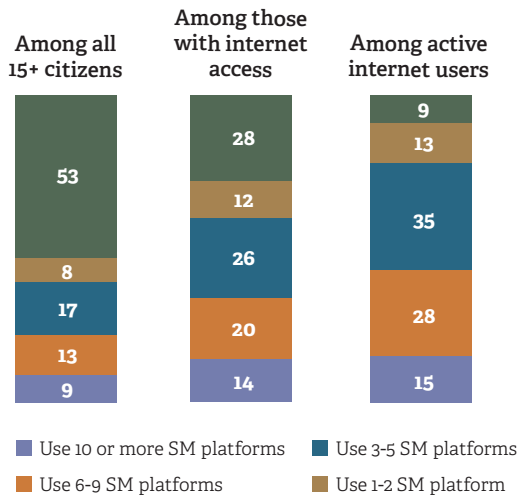


Note: Figures shown here are of active users. Active users are those who use the platform daily or weekly.

3.5: 18 to 25-year-olds are the most active users of all social media platforms. However, before its ban, TikTok was used disproportionately by the youngest demographic, 15 to 17-year-olds. They would have been aged 13 to 15 back then. 15 to 17-year-olds are only second to 18 to 25-year-olds in actively using Facebook, Instagram, YouTube, Snapchat, WhatsApp and Telegram.

OVERALL SOCIAL MEDIA USAGE

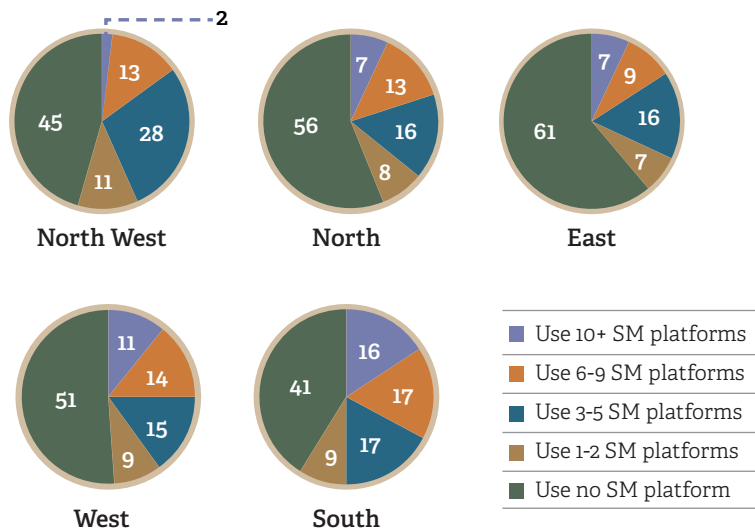
3.6: Extent of social media usage



3.6: Using the 14 questions asked about various social media platforms and their usage, an index of social media use was constructed (see Appendix for details). It was found that a little over half of India does not use any social media or messaging platforms. Even among the two-thirds who have access to the internet in some form, one in four does not use any social media. Among the two-fifths who actively use the internet, nine in ten use social media.

Note: Active internet users are those who said that they had used the internet for some purpose either on a mobile phone or a computer/laptop in the 1-2 months preceding the survey.

3.7: Extent of social media usage in different regions of the country



3.7: South India has the most diverse social media user base in the country, with at least one in three citizens using more than 5 social media or messaging platforms. West India comes next with one in four using more than 5 social media platforms. North West India is

not as varied in its social media use as many in the region are likely to use between 1 and 5 platforms. North and East India have the highest proportion of citizens that don't use any social media platforms.

3.8: Who uses social media platforms a lot and who doesn't

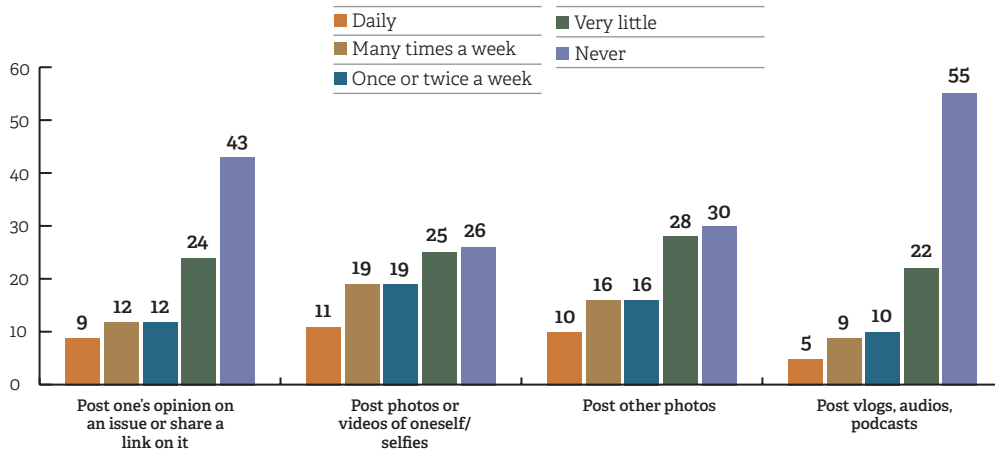
	Uses 10+ SM	Uses 6-9 SM	Uses 3-5 SM	Uses 1-2 SM	Uses no SM
Locality					
Villages	9	10	15	7	59
Towns	11	13	21	9	47
Small cities	13	19	18	11	39
Big cities	9	28	23	7	33
Age group					
15 -17 years old	13	29	26	9	24
18-25 years old	15	31	27	5	22
26-35 years old	14	17	23	10	35
36-45 years old	9	9	18	8	56
46-55 years old	6	4	11	9	71
56+ years old	2	2	4	6	85
Gender					
Women	7	9	12	8	64
Men	12	16	21	8	43
Economic class					
Poor	5	7	8	6	75
Lower Class	6	9	13	8	63
Middle Class	12	17	21	9	41
Upper Class	17	21	30	8	23
Education					
Non-literate	1	1	2	3	93
Primary school	4	3	7	8	79
Middle pass	7	7	15	11	61
High school	13	17	26	12	32
College and above	20	33	30	7	11
Caste-community					
Hindu upper caste	12	17	19	9	43
Hindu OBC	10	14	16	8	52
Hindu SC	9	10	15	8	59
Hindu ST	8	7	13	8	64
Muslims	6	10	18	7	59
Other minorities	9	12	23	11	46

3.8: People living in urban areas, especially in the big cities, are more likely to use social media platforms than people living in rural areas. However, people in small cities are more likely to use many different types of social media platforms than those residing in big cities. Four-fifths of senior citizens and two-thirds of women are not on social media at all, including WhatsApp, which is the most used SM platform. Usage of social media is a function of education

as one can observe that more than nine in ten non-literate people do not use any social media platform. With higher levels of educational attainment, social media use increases. Upper caste Hindus are the most likely to be present on social media, likely due to a higher penetration of smartphones and educational access in this demographic. Hindu Adivasis, Hindu Dalits and Muslims on the other hand are least likely to be present on social media.

ACTIVITIES ON SOCIAL MEDIA

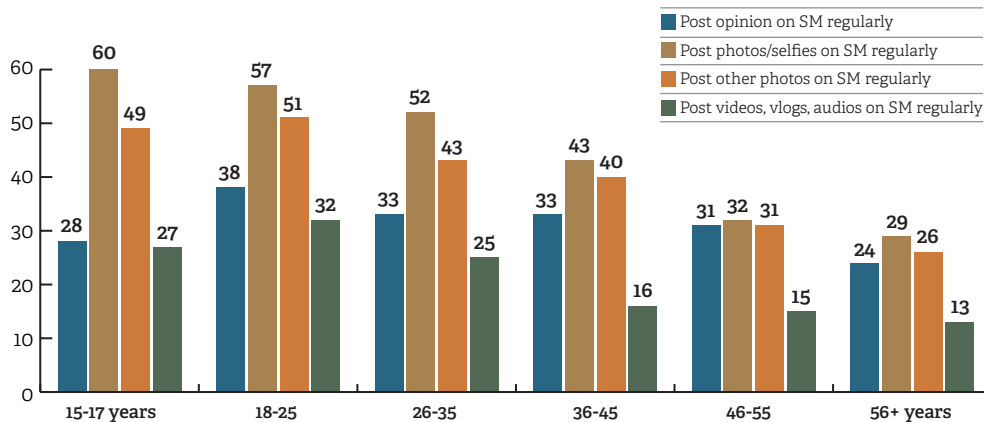
3.9: What are social media users using social media for?



3.9: People use social media platforms for different activities - some actively use social media to share their photos or videos, while others use it to express their opinions on various issues. The survey found that social media users in India are using social media far more to do the former (post photos) than the latter (express opinions). Whereas well

over two-fifths of social media users said that they post photos and videos on social media regularly (daily or weekly), about a third reported that they regularly express their thoughts and opinions on certain issues on social media. When it comes to posting photos, users are more likely to post photos of themselves (selfies) than of something else.

3.10: Activities done on social media by different age groups








Note: Regularly here means daily and weekly

3.10: When it comes to posting photos or selfies, 15-17-year-olds do it the most, followed by 18-25-year-olds. Even though the tendency to post photos on social media declines as one goes up the age ladder, it is nevertheless the

most popular activity on social media among all age groups. As far as other activities such as posting one's opinion on social media is concerned, youth in the age bracket of 18-25 years do it most frequently compared to others.

EXPRESSING POLITICAL VIEWS ON SOCIAL MEDIA

3.11: Frequency with which political opinion is being expressed on various social media platforms

	Posted one's views on politics and public matters or shared some political news on the platform in the last one year	Many times	Sometimes	Once or twice	Never
	Facebook users who have done so on Facebook	18	19	15	48
	Twitter users who have done so on Twitter	10	16	15	59
	Instagram users who have done so on Instagram	12	16	12	60
	YouTube users who have done so on YouTube	14	13	8	65
	WhatsApp users who have done so on WhatsApp	23	19	11	47

3.11: The sharing of political views seems to be happening most on WhatsApp, followed by Facebook. While 42% of WhatsApp users said that they had posted their political views or shared some political news on the platform regularly (many times or sometimes) during the last year, 37% of Facebook users reported doing the same. Surprisingly, in comparison, Twitter users were far less likely to have posted

their political views on Twitter regularly during the last one year. Only 26% did so many times or sometimes. What is also significant is that a very large proportion of social media users (even WhatsApp and Facebook users) do not seem to be posting political opinions on social media platforms either because they are refraining themselves from doing so or because they are simply not interested in politics and public matters.

3.12: Which party's supporters are more likely to post their political opinion on social media?

Posted one's views on politics and public matters or shared some political news on the platform in the last one year	Many times	Some times	Once or twice	Never
FB users leaning towards BJP	19	20	17	44
FB users leaning towards Cong	18	25	19	38
FB users leaning towards Others	22	20	12	46
Twitter users leaning towards BJP	11	16	14	59
Twitter users leaning towards Cong	11	15	16	58
Twitter users leaning towards Others	10	19	16	55

Posted one's views on politics and public matters or shared some political news on the platform in the last one year	Many times	Some times	Once or twice	Never
Insta users leaning towards BJP	12	18	14	56
Insta users leaning towards Cong	11	13	14	62
Insta users leaning towards Others	13	18	11	58
YouTube users leaning towards BJP	14	13	8	65
YouTube leaning towards Cong	15	17	9	59
YouTube leaning towards Others	16	13	7	64
WhatsApp users leaning towards BJP	24	20	12	44
WhatsApp leaning towards Cong	25	21	14	40
WhatsApp leaning towards Others	24	21	9	46

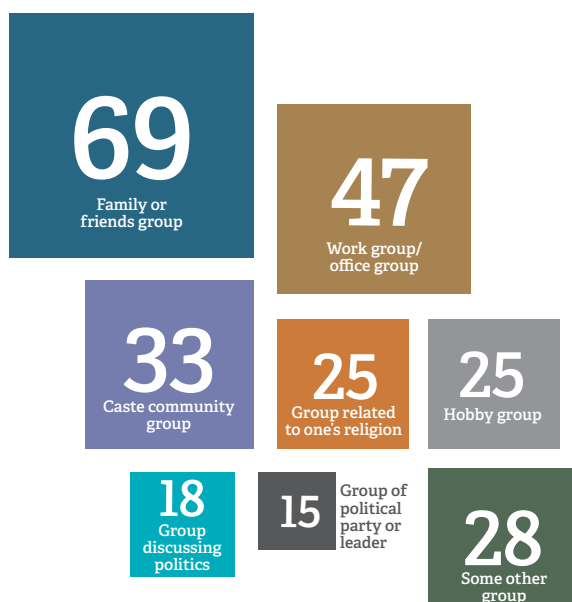
Note: Figures for those without a clear leaning or no leaning have not been shown here.

3.12: The likelihood or frequency of posting one's political opinions on social media does not seem to be related to a user's political leanings. No clear trend emerges from the survey data. Supporters of all parties are more or less equally likely to post or not post political opinions on various platforms.

While the figures for the non-partisans (those without a clear leaning or with no political choice) have not been shown here, they were found to be less likely to express their political opinion on social media platforms than the partisans (clear supporters of political parties).

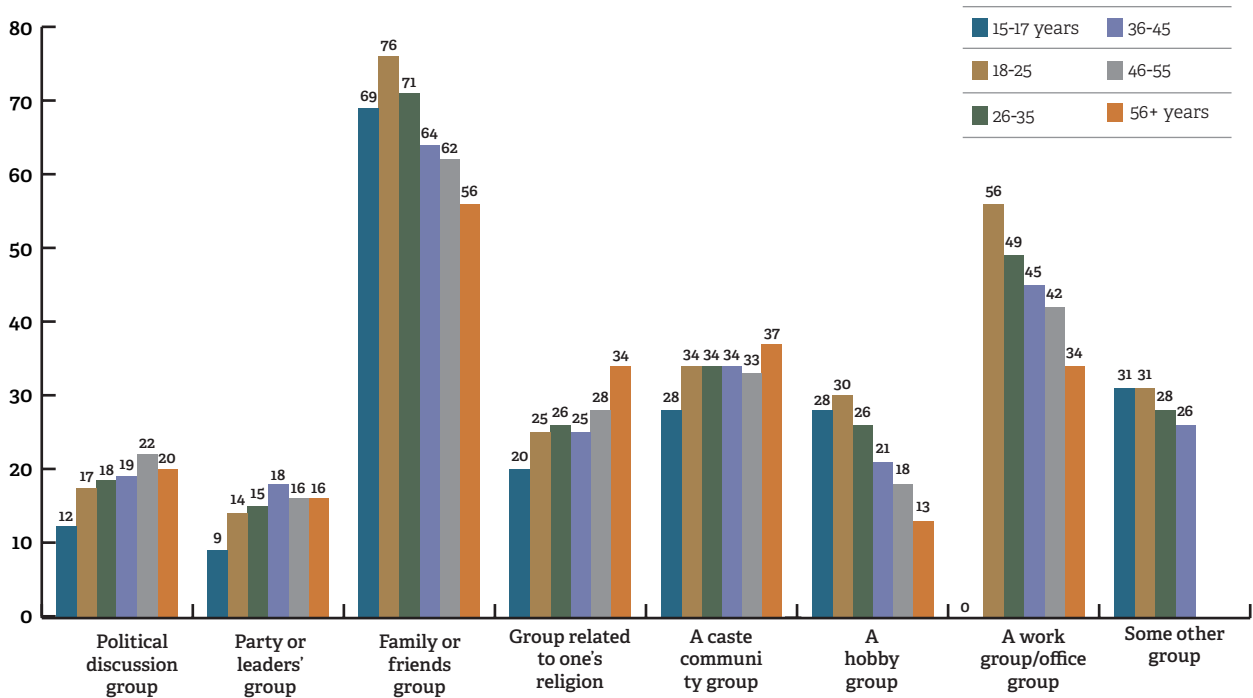
MESSAGING GROUPS

3.13: What kind of chat groups are users of messaging apps like WhatsApp, Telegram etc. part/member of?



3.13: Nearly seven out of ten messaging app users are participants/members of some family or friend group on the messaging app/s they use. Nearly half the users are part of some work-related group. Around one-third have joined a caste or community group and one in four is part of a religion-related group. Only one in every six messaging app users reported being part of a political group on the messaging app/s that they use.

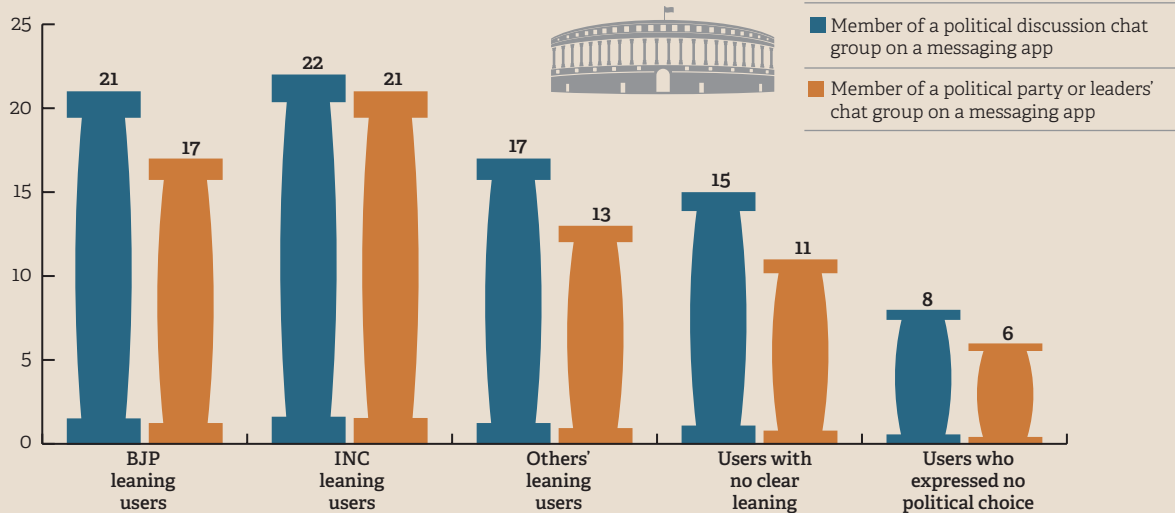
3.14: Membership of various chat groups on messaging apps - by age of users



3.14: It is found that the majority of messaging app users across all age groups are part of family/friends' groups. However, there are some notable differences that bear mention. The older age groups are more likely to be part of political discussion groups and religious groups as opposed to younger

ones. The younger age groups are more likely to be part of family groups, hobby groups and work groups than older ones. As far as the caste community groups are concerned, there is no clear trend observed as all age groups except the youngest are more or less equally likely to be part of them.

3.15: Membership of political chat groups on messaging apps - by political leaning of messaging app users



3.15: The data also suggests that messaging app users who have a leaning towards the Congress party are slightly more likely to be part/member of political groups on messaging apps than those who are leaning towards the BJP or other parties. However, this difference

between Congress and BJP supporters is marginal. Not surprisingly, non-partisan people are less likely to join any political discussion group, political party's group, or a leader's group compared to their partisan counterparts.

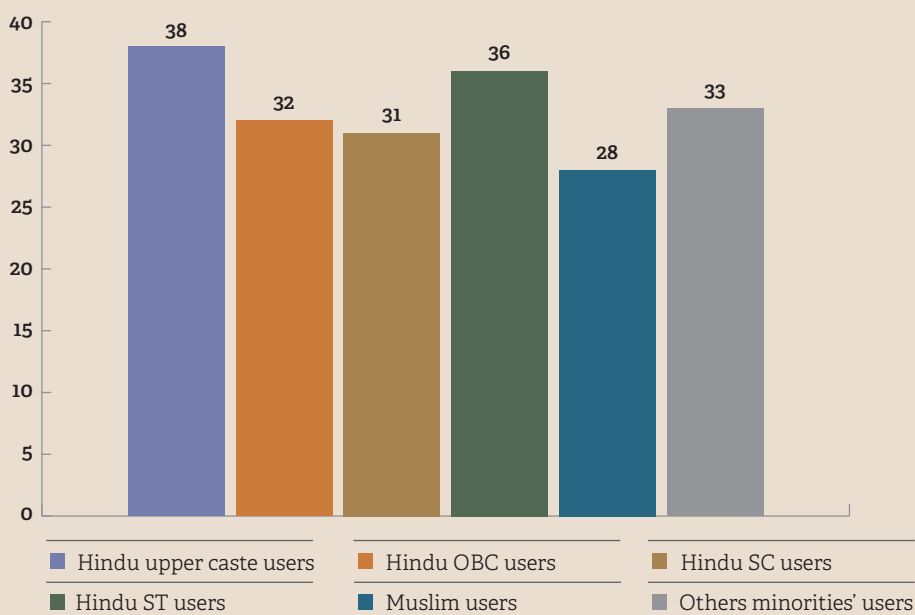
3.16: Membership of a messaging app chat group that caters to one's religion - by religious identity of messaging app users



3.16: Messaging app users belonging to religious minorities are slightly more likely to be part of a chat group that

caters to their religion than users from the majority Hindu community.

3.17: Membership of a messaging app chat group that caters to one's caste-community - by caste-community identity of messaging app users



3.17: Hindu upper caste and Hindu Adivasi messaging platform users are more likely to be part of a chat group

that caters to their caste-community than others.

EARNING THROUGH SOCIAL MEDIA

3.18: How widespread is the practice of making money by posting something on social media?

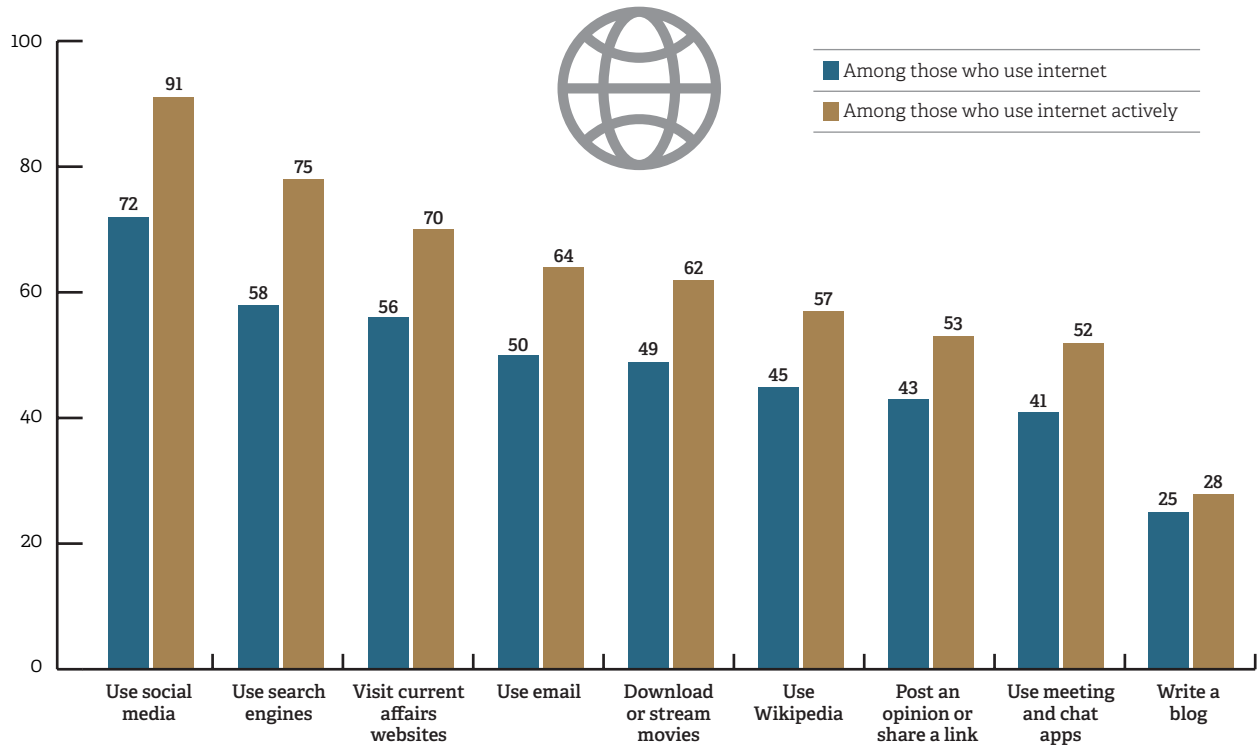
	Yes, have done so myself	Didn't do so myself, but a household member did	An attempt to was made but didn't succeed
All social media users	3	4	4
By Locality			
Villages	2	4	3
Towns	5	4	4
Cities	4	5	5
Big Cities	3	3	6
By Age group			
15-17 years	6	3	12
18-25	8	4	6
26-35	4	5	6
36-45	4	5	5
46-55	3	9	5
56+	3	7	6

3.18: The survey asked social media users if they or a member of their household make money or have made money by posting content on social media like YouTube, Instagram, TikTok etc. Around 7% answered in the affirmative of which 3% were those who said that they had done it themselves, and 4% were those who said that someone else in the household had done it. Around 4% also said that

while they/someone in the household had tried making money through social media, they had not been successful. According to the survey data, the practice of earning through social media seems to be taking place slightly more among social media users in towns and small cities than in big cities. It is also twice as likely to take place among young social media users as middle aged and elderly ones.

INTERNET BEYOND SOCIAL MEDIA

3.19: What are internet users doing on the internet?



3.19: It is found that close to three-fourths of internet users use social media and the proportion of social media users goes up to nine in ten among active internet users. Other than using social media, active internet users

are mostly engaged in using search engines (75%) and visiting news and current affairs websites (70%). Interestingly, only about two-thirds (64%) of active internet users use email.

3.20: Frequency of various internet activities among active internet users

	Daily	Many times a week	Once or twice a week	Very little	Never
Use search engines	24	17	13	21	25
Visit current affairs websites	19	16	12	23	30
Use email	12	13	13	26	36
Download or stream movies	11	13	15	23	38
Use Wikipedia	11	12	11	23	43
Post an opinion or share a link	8	11	11	23	47
Use meeting and chat apps	11	10	9	22	48
Write a blog	3	4	5	16	72

4

NEW MEDIA: EMERGING CONCERNS AND CHALLENGES

INTRODUCTION

It is undeniable that the internet and digital media have changed our lives, revolutionizing the way we connect, communicate and engage with other people, as well as how we consume information. They also appear to have made our lives far more comfortable and convenient by enabling us to do things and access services more quickly and more easily. The internet has also become a site for expression and resistance, offering a platform to share ideas and opinions. However, along with these unquestionable benefits, there is a dark side to it as well, which is beginning to become all too apparent and worrisome.

The increased connectivity has blurred the lines between what is public and private. As people use digital platforms to connect with others, access information and entertainment, and register for welfare schemes and services, they are knowingly and unknowingly sharing huge amounts of personal and behavioural information. By doing so, they are opening themselves up to cyber attacks and the possibility of their personal data being harvested, stolen, compromised or misused by governments and private companies. The problem is particularly acute in a country like India where existing laws related to privacy lack stringency and there hasn't been any personal data protection legislation passed yet. Surveillance, a matter linked to privacy, is also a major issue of concern. This is especially in the light of recent allegations that the government used surveillance software to spy illegally on the smartphone

activities of journalists, activists and political opponents¹.

Another negative of cyberspace is the use of social media and messaging platforms to peddle fake news, disinformation, and hate speech. This is a serious issue that is not only poisoning the atmosphere on these platforms, but is also resulting in very real offline consequences, such as attacks towards people, particularly those from vulnerable groups.

Online trolling and harassment by known and unknown entities is also a major challenge that leads to self-censorship by individuals holding dissenting and minority political views, thus stifling their voice and curbing their democratic participation. Also affecting people's participation and their basic rights are frequent internet shutdowns imposed by various governments. India, in fact, leads the rest of the world on this matter. According to a 2022 report released by the digital rights advocacy group Access Now, Indian authorities blocked or disrupted internet access as many as 106 times in 2021, which was seven times more than the country in second place².

There have also been attempts by authorities to restrict online speech, particularly posts that target political leaders and governments. Despite the

¹ For more see 'The Battle for the World's Most Powerful Cyberweapon', New York Times, January 28, 2022; Available at <https://www.nytimes.com/2022/01/28/magazine/nso-group-israel-spyware.html>

² For more see 'Internet shutdowns in 2021 report: India is the world's largest offender', Access Now; April 28, 2022; Available at <https://www.accessnow.org/internet-shutdowns-india-keepiton-2021/>

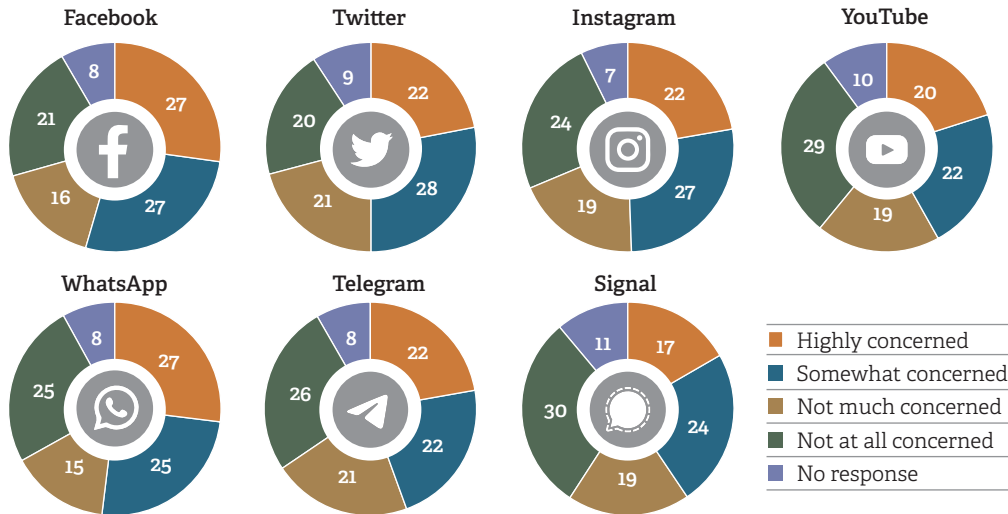
Supreme Court expanding the contours of free speech seven years ago by scrapping the controversial Section 66A of the IT Act, law enforcement agencies of various states continue to arrest people for posting opinion or material (especially political) that is deemed as “offensive” in nature.

These emerging concerns and challenges amidst a rapidly digitising India are grave and need urgent attention. In our Media survey, therefore, we tried to ascertain where people stand on some of these vital matters and what their experiences have been like. While there is no dearth of academic commentary on these issues by scholars who study the media

and the digital space, there is hardly any public opinion data on what people at large think about these matters. In fact, for a long time it was widely assumed that in a developing country like India where a large majority of the population is busy struggling to make ends meet, issues of privacy and surveillance were esoteric and elite concerns and hardly mattered to the masses. The survey hence tried to address this lacuna and made an attempt to find out the true picture by asking specific questions on matters such as privacy, surveillance, fake news, misinformation, self-censorship and online speech. This section shares those findings.

PRIVACY CONCERNS

4.1: Privacy concerns while using major social media and messaging platforms (among their 'active' users)



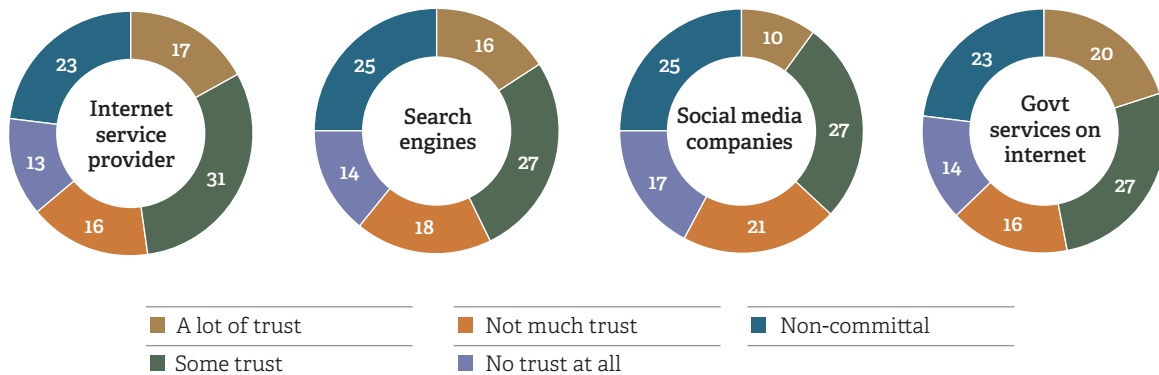
Note: Figures shown here and in the other charts in this section are percentages, unless specified otherwise. Figures for each platform are among their active users. Active user means daily or weekly user.

Question asked: How concerned are you about your privacy while using ___?

4.1: Active users of Facebook and Whatsapp are the most likely to be concerned about their privacy being compromised while using the two platforms. Signal's active users appear to be the least concerned about their

privacy being compromised while using the app. YouTube's and Telegram's active users are also not terribly concerned about their privacy getting affected. Please note that active users here refer to daily or weekly users.

4.2: Trust of active internet users in various internet services for ensuring the confidentiality of their personal data and internet activities



Note: Active internet users are those who confirmed using the internet for some purpose in the two months preceding the survey.

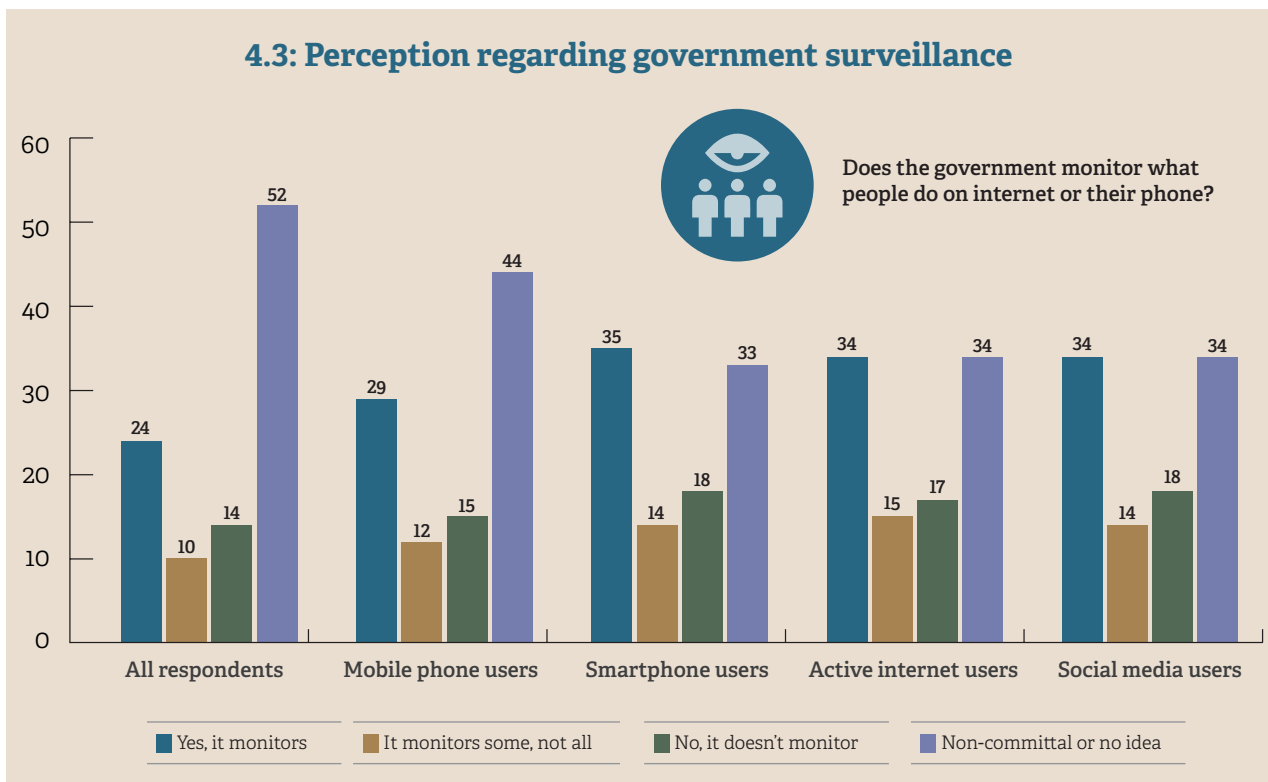
Question asked: How much do you trust __ to ensure the secrecy/confidentiality of your personal data and activities on the internet?

4.2: Active internet users trust government services/websites on the internet and their internet service provider the most for ensuring the confidentiality of their personal data and activities on the internet. Search engines like Google and Yahoo also appear to be quite trusted on this count.

Social media companies are the least trusted. In fact, they are more likely to be not trusted (38%) than be trusted (37%). Please note that active internet users are those who confirmed using the internet for some purpose in the two months preceding the survey.

GOVT SURVEILLANCE OF DIGITAL ACTIVITY

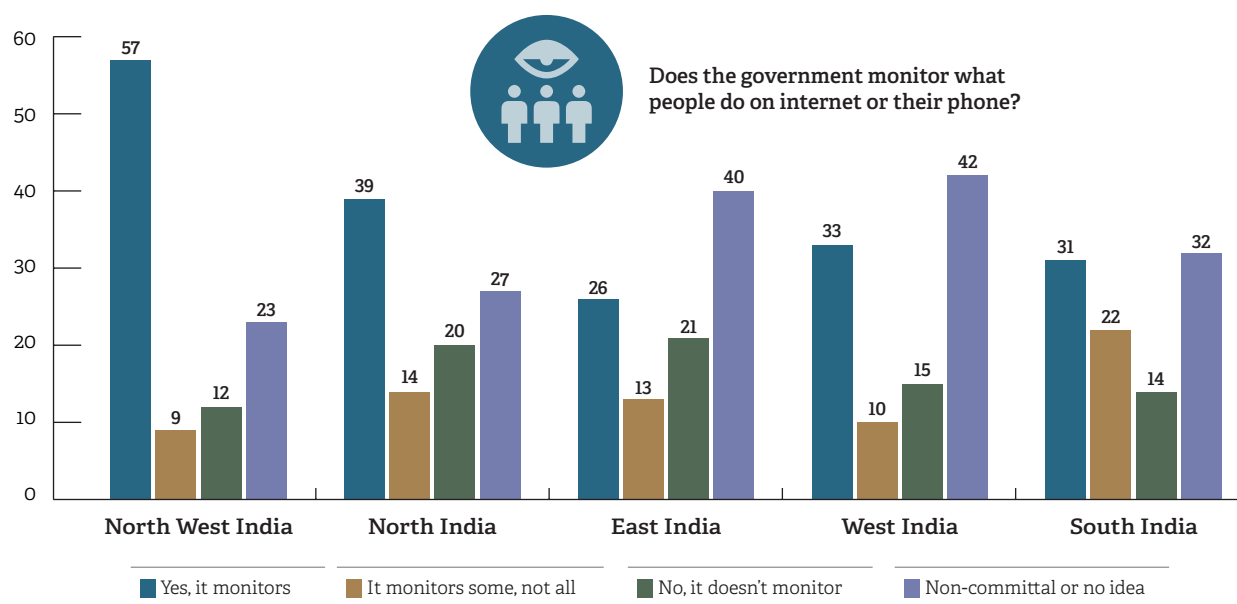
4.3: Perception regarding government surveillance



4.3: Over one-third of smartphone users, active internet users and social media users (all three are overlapping categories) are of the view that the government monitors what people do on the internet or their mobile phone. If we add the percentage of those who

feel that the government monitors only some people and not all, then the figure of smartphone, active internet and social media users who believe that the government monitors rises to nearly 50%.

4.4: Perception of active internet users regarding government surveillance – Region-wise



4.4: The perception that the government monitors people's online and phone activities is strongest among active internet users of North West and

North India. Many in South India gave a qualified answer that the government monitors only some people, not all.

4.5: The belief that the government surveils people's online and phone activities strengthens with urbanity, education and economic class

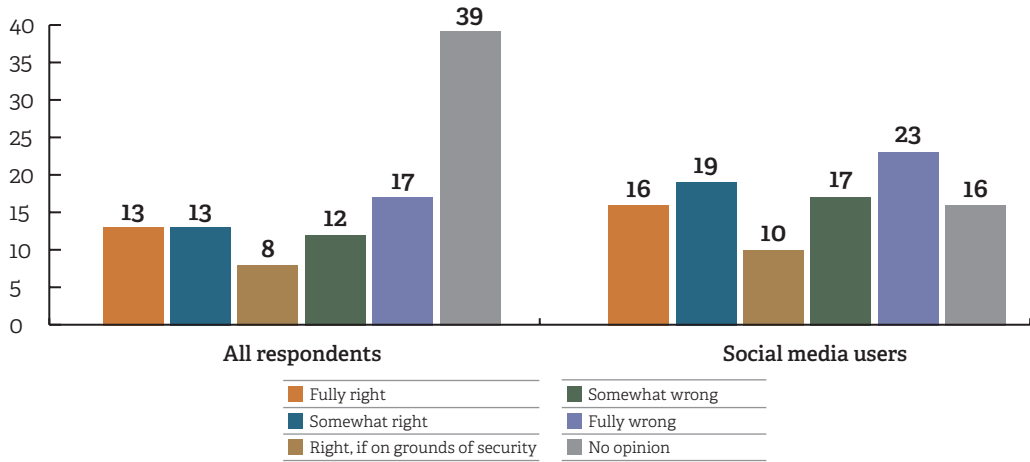
Does the government monitor what people do on internet or their phone?				
	Yes, it monitors	It monitors some, not all	No, it doesn't monitor	Non-committal or no idea
Locality				
Village	33	12	21	34
Town	34	15	17	34
City	35	18	15	32
Big City	41	21	7	31
Education				
Non-literate	15	11	13	61
Primary school	26	10	14	50
Middle pass	28	10	19	43
High school	33	14	19	33
College and above	41	18	16	26
Economic class				
Poor	28	11	20	41
Lower	31	13	16	40
Middle	35	15	18	32
Rich	40	18	16	27

Note: Figures are among active internet users

ATTITUDES ON GOVT SURVEILLANCE

4.6: People's opinion on morality of government surveillance of social media and messaging platforms

If any government monitors what people post on social media or WhatsApp etc., then in your opinion will it be right or wrong in doing so?

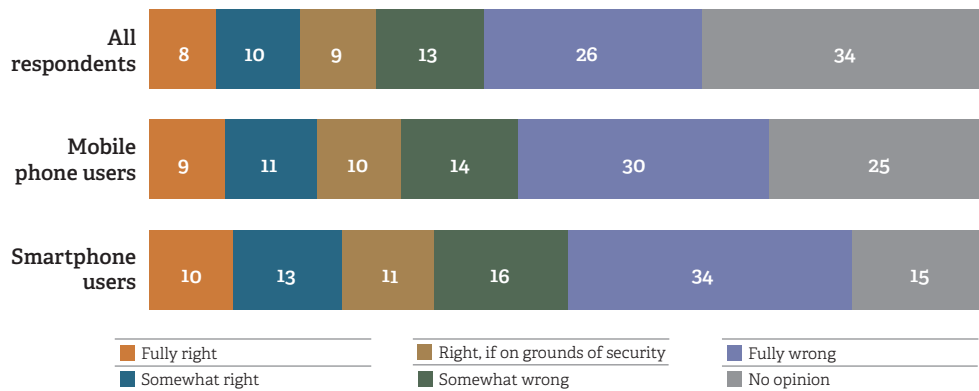


4.6: The public is quite divided on the ethicality/morality of the government monitoring what people do on social

media or Whatsapp. 45% of social media users believe there is nothing wrong with it and 40% believe it is wrong.

4.7: People's opinion on morality of government surveillance of phone conversations

If any government finds out who people talk to on the phone or what they talk about, then in your opinion will it be right or wrong in doing so?



Note: Mobile phone users include both ordinary mobile users and smartphone users

4.7: On the issue of government surveillance of phone conversations, most are against it than are in favour of it. This is irrespective of whether they have a phone or not. Put simply, disapproval of phone conversation surveillance

by the government is far greater than disapproval of social media surveillance. It is nonetheless significant that about one-third of mobile phone users (a sizable share) support government surveillance of phone conversations/ activities.

4.8: Net support for government surveillance of social media and phone activities – by perception about whether government surveillance happens or not

	Net support* for govt. surveillance of social media/WhatsApp activities	Net support** for govt. surveillance of phone conversations
Govt surveils	+16	-10
Govt doesn't surveil	-8	-29
No idea	-1	-15

Note: Net support is the proportion of those who consider it to be right (fully right, somewhat right and right on security grounds) minus the proportion of those who consider it to be wrong (fully wrong and somewhat wrong).

* Among social media users

** Among mobile phone users

4.8: Surprisingly, social media users who believe that the government monitors people's internet and phone activities are more likely to consider government surveillance of social media activities to be right than those who believe that the government doesn't monitor these activities. Mobile phone users irrespective of whether or not they believe that the government surveils their conversation are opposed to this surveillance rather than being in favour

of it. However, even among them, those who believe that the government surveils people's phone conversations are less likely to consider it wrong than those who believe otherwise. In other words, people's belief that government surveillance takes place shouldn't be misconstrued as disapproval of it. There is an acknowledgment that the government monitors one's actions on the internet, but this isn't necessarily seen as a bad thing.

4.9 Net support for government surveillance of social media and phone activities – Region-wise

	Net support* for govt. surveillance of social media/WhatsApp activities	Net support** for govt. surveillance of phone conversations
North West India	-3	-31
North India	+13	-12
East India	+5	-12
West India	-2	-27
South India	+12	-15

Note: Net support is the proportion of those who consider it to be right minus proportion of those who consider it to be wrong.

* Among social media users

** Among mobile phone users

4.9: Most social media users in West and North West India were found to be against government surveillance of social media activities; in North, South and East India the proportion of those in favour of surveillance was greater than the proportion of those against it. As far as government surveillance of

mobile phone activities is concerned, opposition to it was greater than support for it across all regions. However, once again users in South, North and East India were weaker in their opposition to it than those in North West and West India.

4.10: Net support for government surveillance of social media and phone activities –Religion-wise

	Net support* for govt. surveillance of social media/WhatsApp activities	Net support** for govt. surveillance of phone conversations
Hindu	+7	-13
Muslim	+4	-14
Other communities	-8	-24

Note: Net support is the proportion of those who consider it to be right minus proportion of those who consider it to be wrong.

* Among social media users

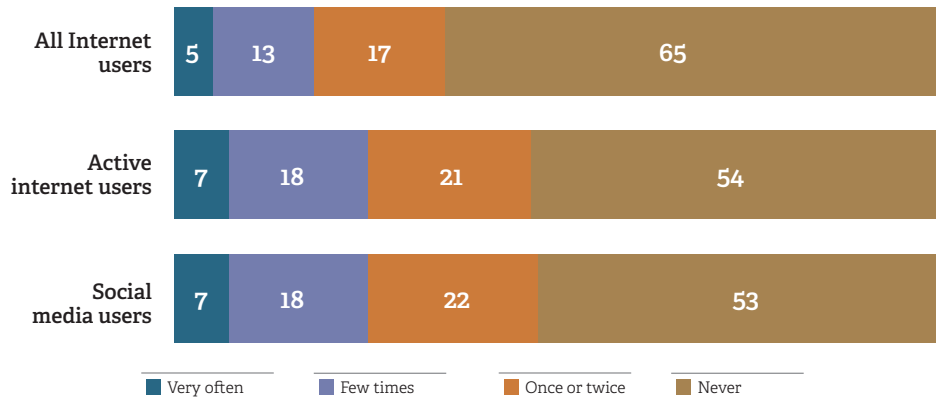
** Among mobile phone users

4.10: Of all the religious communities, Hindu social media users are the least opposed to/most supportive of surveillance of social media activities by the government. Muslims are relatively less supportive and many among them preferred to stay silent on the matter. Other minority communities, particularly Sikhs, are more likely to consider surveillance to be wrong than

right. The same trend can also be seen with respect to opinion on government surveillance of phone activities. Even as mobile phone users across all religious communities are more likely to consider government surveillance of phone activities to be wrong than right, Hindu and Muslim mobile phone users are less opposed to it than phone users from other communities.

FAKE NEWS EXPERIENCE AND CONCERNS

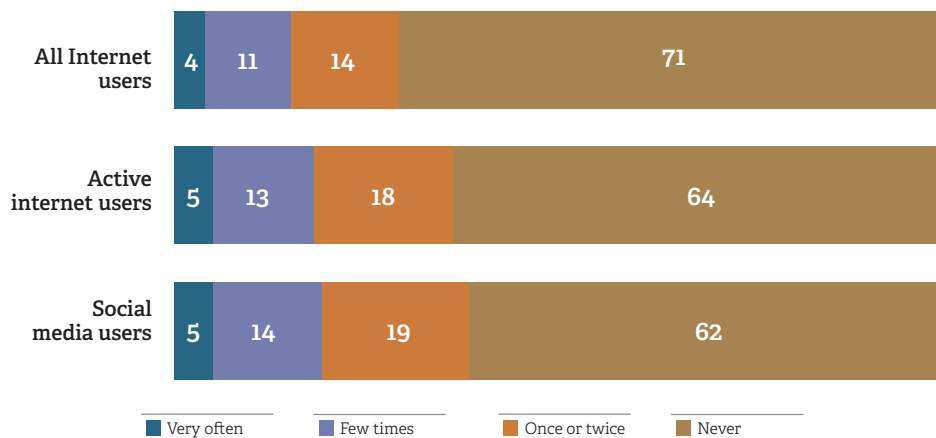
4.11: Experience of having been misled by fake news on internet or social media



Note: Those who did not respond have been added to the never category
 Question asked: How often have you been misled by inaccurate or fake information shared by someone else on social media or WhatsApp?

4.11: Nearly half of active internet users and social media and messenger platform users admitted to having been misled by fake news or information online at some point; however less than one in ten reported that this has happened very often. They were more likely to report that it has happened a few times or once or twice.

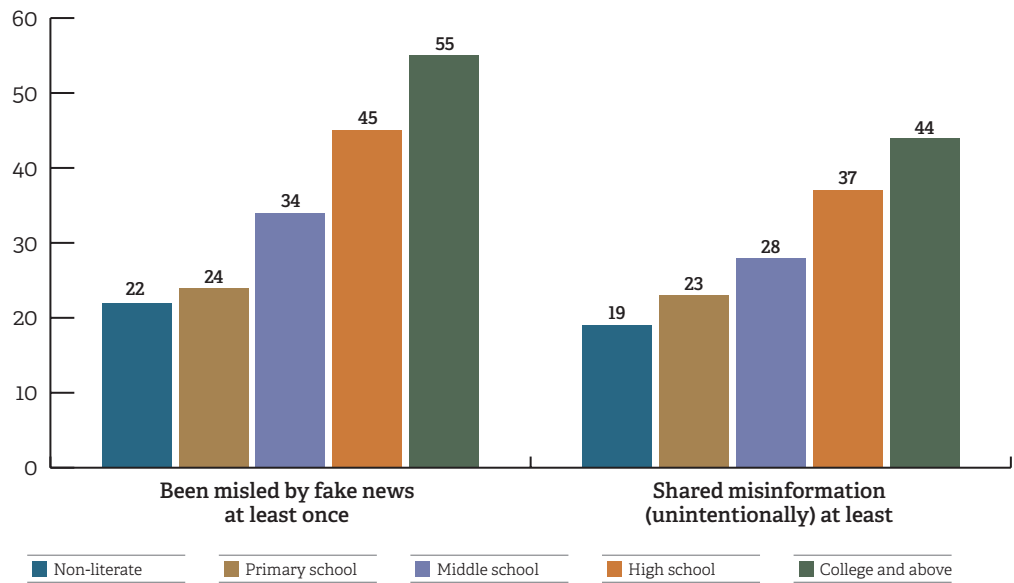
4.12: Experience of sharing fake news/info unknowingly and realising later that it was false



Note: Those who did not respond have been added to the never category
 Question asked: How often have you yourself shared or forwarded some information or news on the internet or social media or WhatsApp and realized later that it was inaccurate or fake?

4.12: Around two-fifths of active internet users and social media users admitted to have shared/forwarded misinformation at some point of time; i.e., they unknowingly and unintentionally shared/forwarded fake news and realised later that it was false.

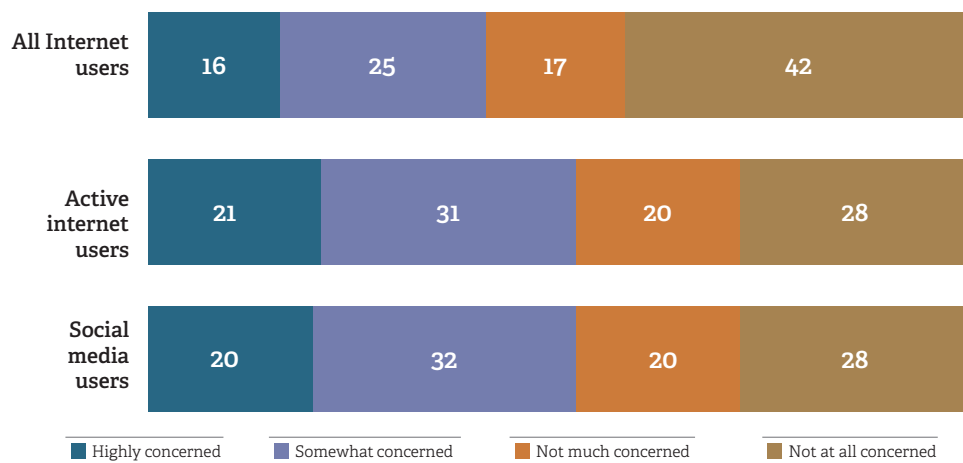
4.13: Fake news experience of active internet users - by their educational attainment



4.13: Highly educated, active internet users were more likely to admit to having been misled by fake news or more likely to have unknowingly and unintentionally shared fake news than

the less educated respondents. This indicates that the fake news estimates could well be underestimated as the less educated may not be able to judge/decipher fake news.

4.14: Level of concern about receiving fake news or info on internet or social media or WhatsApp

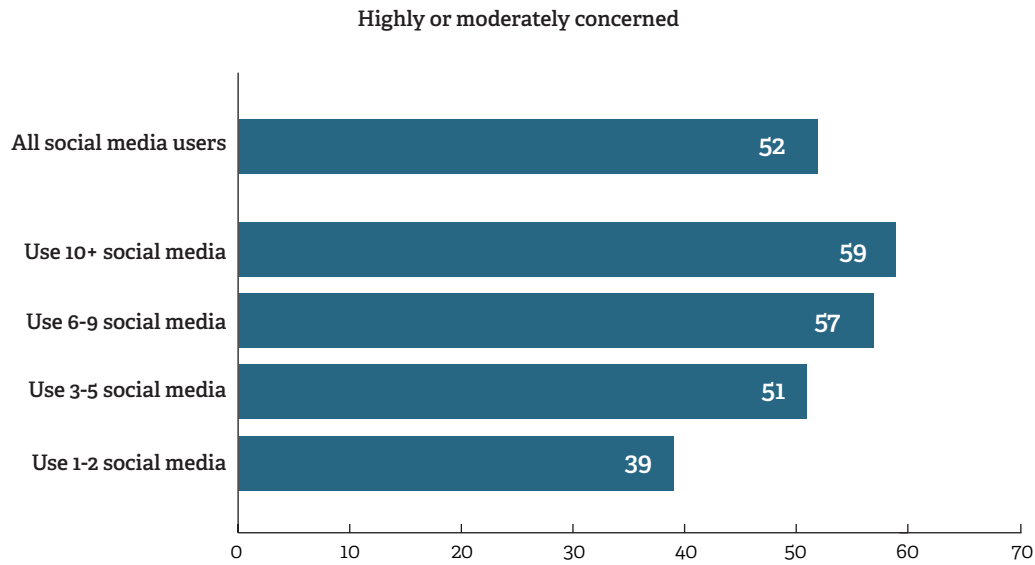


Note: Those who did not respond have been added to the not at all concerned category
 Question asked: How concerned are you about receiving or being misled by inaccurate or fake information on the internet, social media or WhatsApp etc.?

4.14: One-fifth of active internet users and social media users are very concerned about receiving fake news

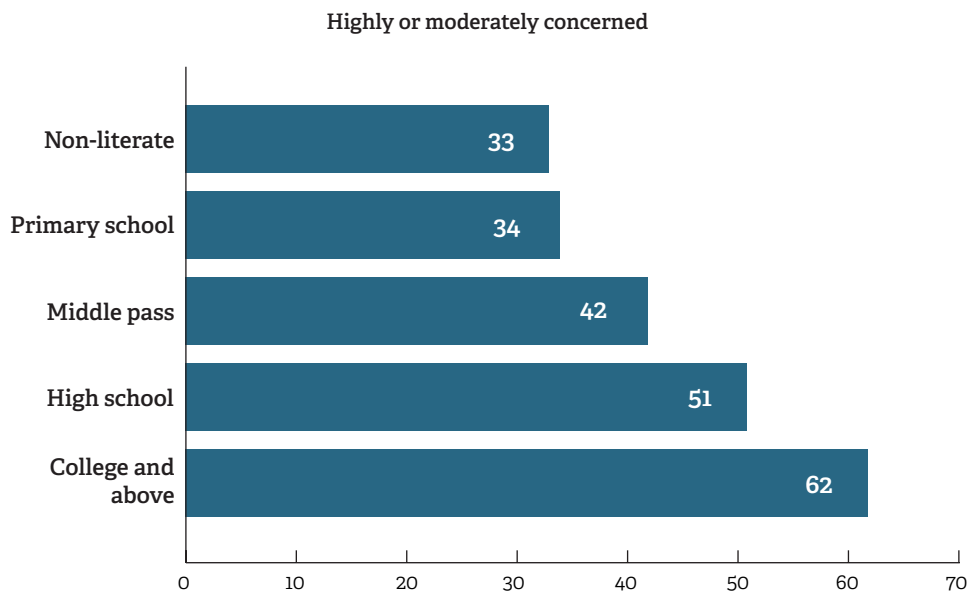
or information on the internet, social media or messenger apps, one-third are moderately concerned.

4.15: Concern about receiving fake news - by number of social media platforms used



4.15: Those who use more social media platforms are on the whole more likely to be concerned about receiving fake news on social media than those who use few platforms.

4.16: Concern among social media users about receiving fake news - by their educational attainment



4.16: Fake news on social media is more a concern of social media users who are highly educated. In fact, there appears to be a neat association between a user's level of education and their concern about receiving fake news.

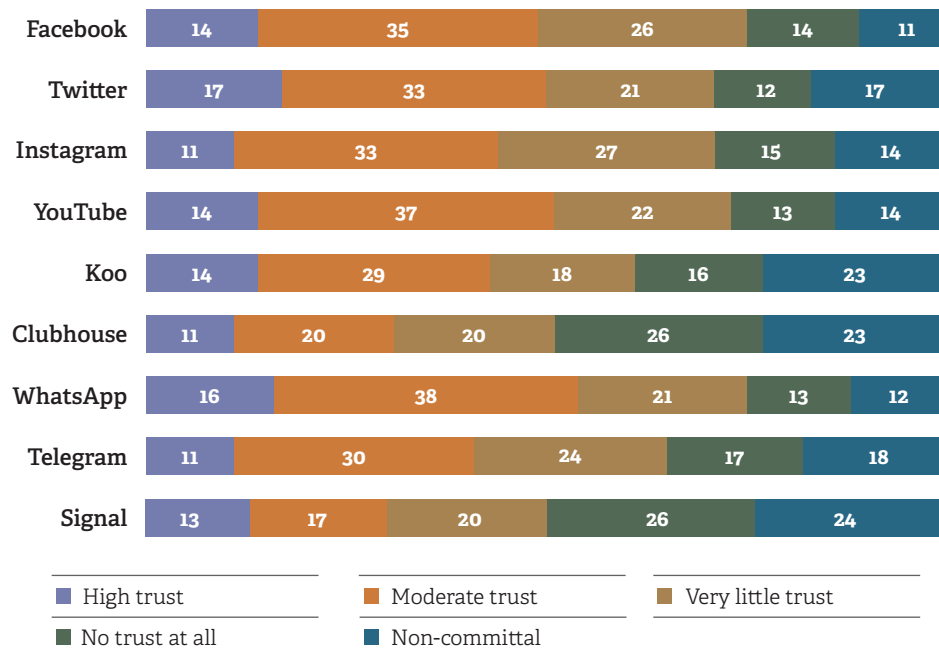
4.17: Concern about receiving fake news - by the frequency of having experienced it

	Highly or moderately concerned about receiving fake news on social media
Social media users who have been misled by fake news...	
Very often	79
Few times	77
Once or twice	62
Never	39
Social media users who have shared fake news unknowingly...	
Very often	88
Few times	75
Once or twice	60
Never	44

4.17: Citizens who have been misled by fake news, or have shared it unknowingly more often than others, are more likely to be concerned about receiving fake news on the internet or social media. That being said, sizable

proportions (two-fifths) of those who do not think they have been misled by fake news yet or do not think they have shared it unknowingly are also concerned about receiving it.

4.18: Trust in information or news received on various social media platforms (among their active users)



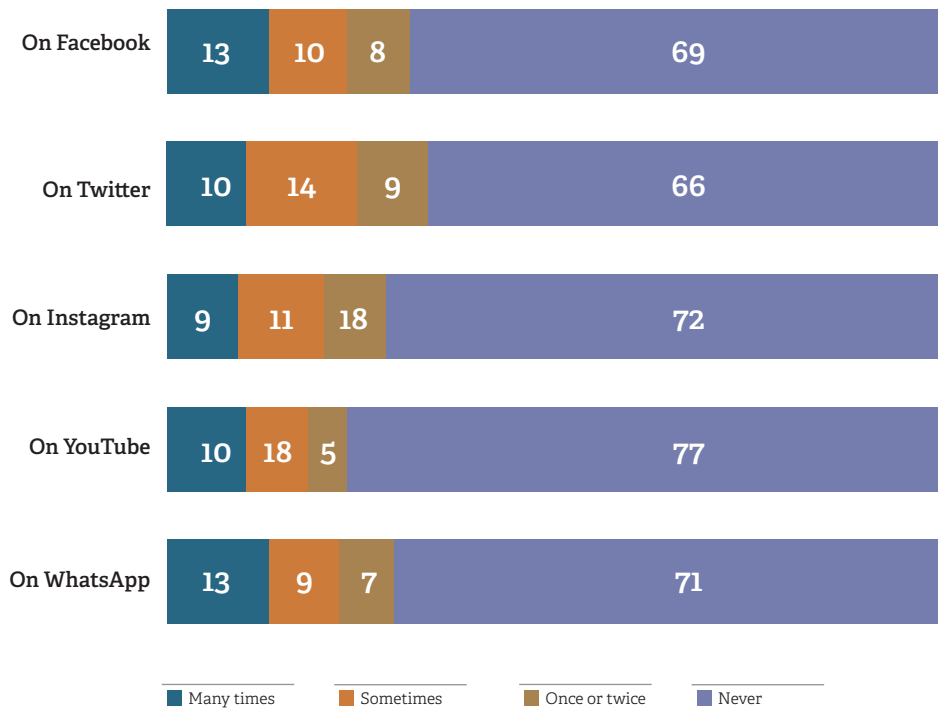
Note: Figures for each platform are among their active users. Active user means daily or weekly user. Question asked: Generally, how much do you trust the information or news that you come across or receive on X?

4.18: Very few active social media users have high trust in the information or news that they receive on social media. Most have moderate to low trust. Twitter and WhatsApp are the most highly trusted of all. However, even with respect to them only a sixth of their users highly trust them to disseminate correct news or information. Trust in information received on social media

and messenger platforms seems to be associated with the number of years they have been in existence. Users of relatively newer platforms like Clubhouse and Signal are more likely to not trust the information received on them at all than users of other more established platforms. However Koo is an exception.

HARASSMENT ON SOCIAL MEDIA

4.19: Harassment/threats experienced by active users of major social media platforms



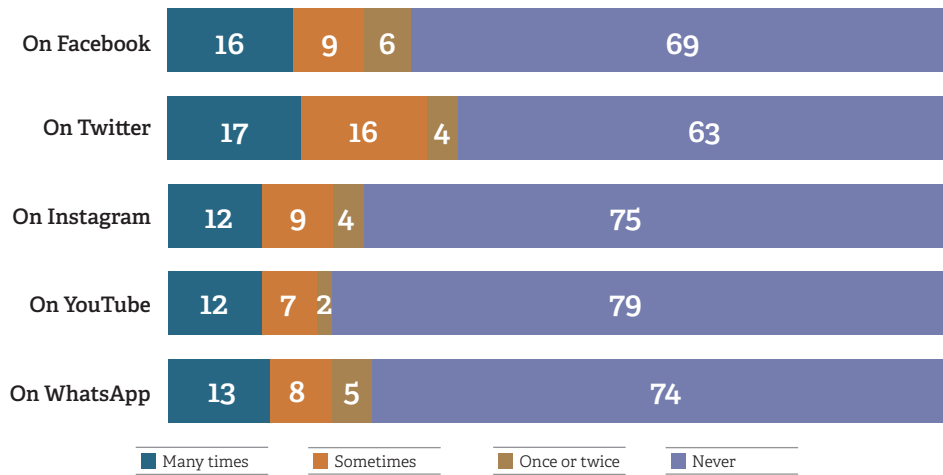
Note: Figures for each platform are among their active users, with an active user being one that uses the platform on a daily/weekly basis. Those who did not respond have been added to the never category.

Question asked: In the last one year or so, how many times did it happen to you that after writing or sharing something on __ you were threatened or harassed/troubled by a known or unknown person?

4.19: Three out of every ten active Facebook, WhatsApp and Twitter users have been threatened, harassed

or trolled by known or unknown people after sharing content on these platforms in the recent past.

4.20: Harassment/threats experienced by daily users of major social media platforms



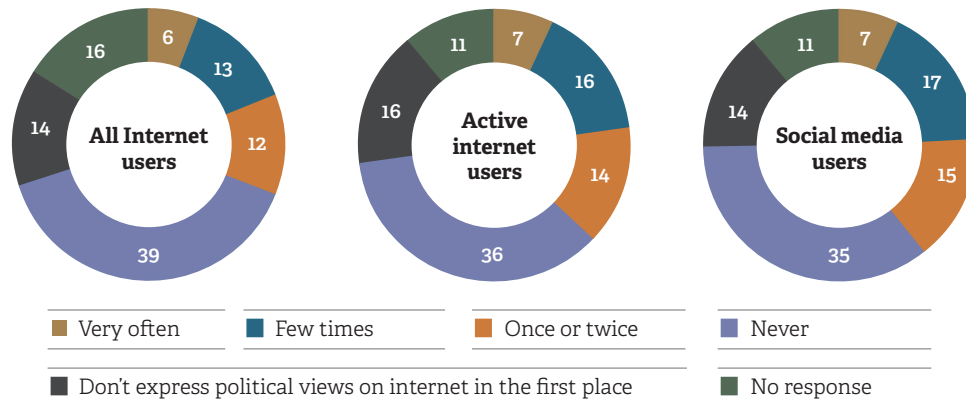
Note: Figures for each platform are among their daily users. Those who did not respond have been added to the never category.

4.20: As far as daily users of social platforms are concerned, Twitter's are the most likely to have experienced

trolling/harassment, followed by Facebook's daily users.

SELF-CENSORSHIP ON INTERNET

4.21: Hesitation/fear in expressing political views in the last one year on internet/social media

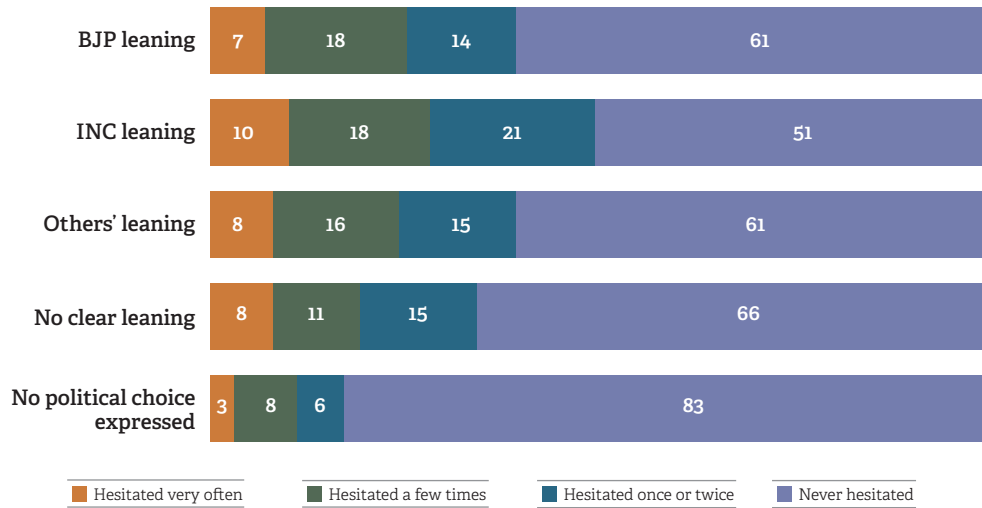


Question asked: In the last one year, how often have you thought twice before expressing an opinion on political and public matters on social media or WhatsApp groups or stopped yourself from doing so, because you feared being misunderstood or seen in a bad light by people you know or feared being harassed by strangers?

4.21: Around two in every five social media users have, in the last year, either stopped themselves from expressing their political opinions, or at least thought twice about it. This is because

they feared being misunderstood, seen in a bad light by people they know or being harassed by strangers. This tendency is known as the "spiral of silence" in communication studies.

4.22: Hesitation/fear in expressing political views in the last one year on internet/ social media – by political leaning of active internet users



Note: Figures are for active internet users. Those who did not respond have been added to the never hesitated category.

4.22: Active internet users leaning towards the Congress party are slightly more likely to have hesitated in expressing their political views on social media in the last one year compared to active internet users leaning towards the BJP and other parties.

4.23: Among Congress supporters, Hindus leaning towards the party are more likely to have hesitated in expressing a political opinion on the internet compared to Muslims leaning towards it

Hesitated in expressing political views in the last one year on internet/social media because of the fear of being judged by known people or harassment by unknown people

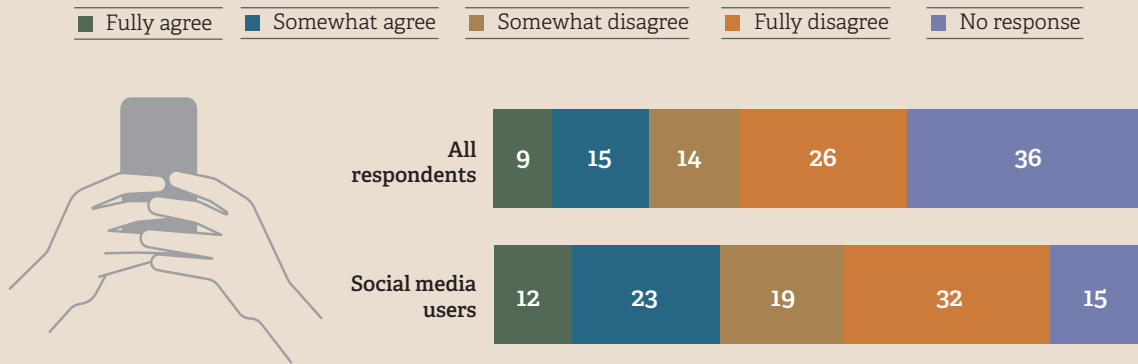


Note: Figures are for active internet users leaning towards INC. Those who did not respond have been added to the never hesitated category.

ATTITUDES ON FREEDOM OF EXPRESSION ON SOCIAL MEDIA

4.24: Opinion on freedom to express ideas on social media, even if they are offensive

Even if an idea is offensive, there is nothing wrong if people express it on social media or WhatsApp. Do you agree or disagree?

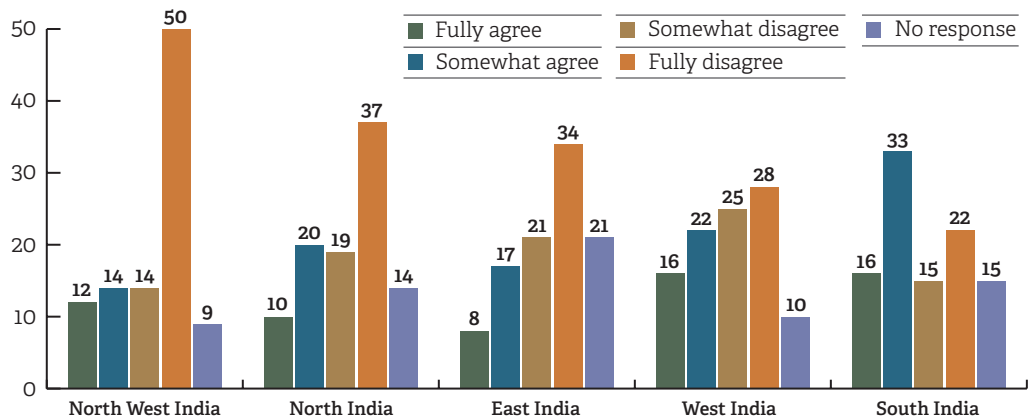


4.24: Overall, there are more social media users opposed (51%) to the expression of offensive ideas than there those in favour of their expression (34%).

This is true not just for social media users but for the general population as well irrespective of whether they are on social media or not.

4.25: Opinion of social media users on freedom to express ideas on social media, even if they are offensive – Region-wise

Even if an idea is offensive, there is nothing wrong if people express it on social media or WhatsApp. Do you agree or disagree?

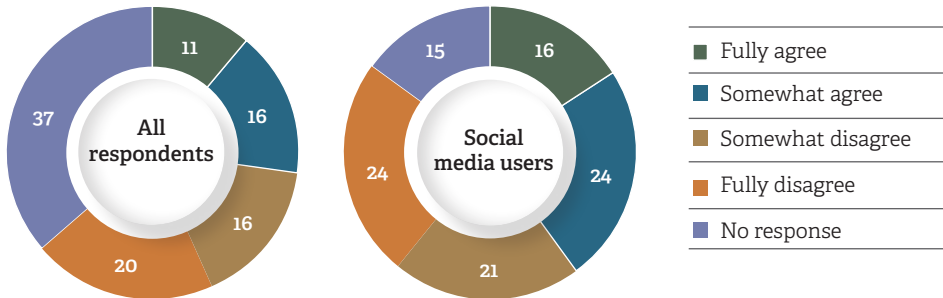


4.25: The only region in the country where social media users are more likely to be in favour than against the expression of 'offensive' ideas on social media is South India. 49% of the social media users in the Southern States (all combined) agreed with the proposition

that there is nothing wrong in expressing views/ideas on social media that might be 'offensive' in nature. North West India was most opposed to the proposition (64%). Many social media users in East India did not give their opinion on the question.

4.26: Opinion on freedom to express opinion against the government on social media, however offensive or objectionable it may be

People should be free to say whatever they feel about their government on social media or WhatsApp, however objectionable or offensive their opinion may be. Do you agree or disagree?

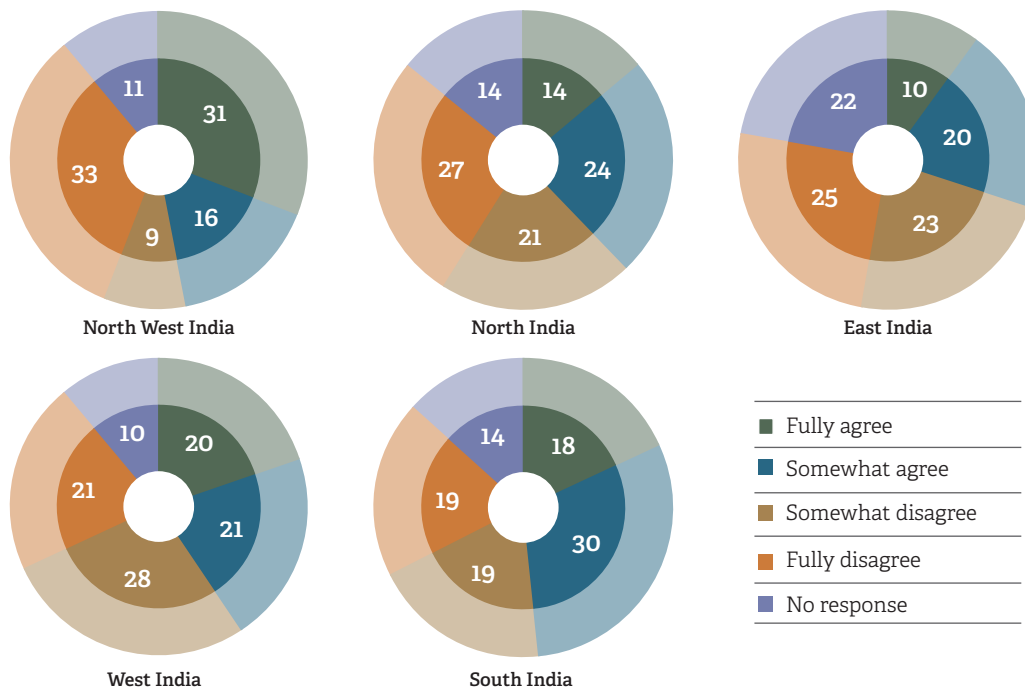


4.26: Respondents were also asked in the survey about what they felt about posting an offensive opinion about the government on social media and

messaging platforms. On this matter, there was more of a divided opinion among social media users - 45% were against it and 40% saw nothing wrong in it.

4.27: Opinion of social media users on freedom to express opinion against the government on social media, however objectionable or offensive it may be – Region-wise

People should be free to say whatever they feel about their government on social media or WhatsApp, however objectionable or offensive their opinion may be. Do you agree or disagree?

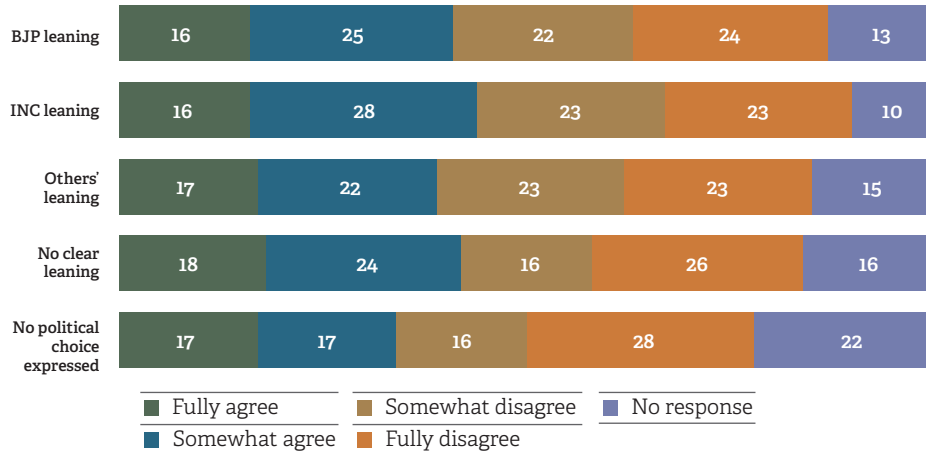


4.27: Whereas North West India is strongly opposed to posting offensive ideas on social media (see Figure 4.25), it is quite open to the idea of posting an 'objectionable' opinion against the

government (any government). In fact, it was found to be more in agreement with the idea than in disagreement. South India too showed greater agreement than disagreement with the idea.

4.28: Opinion of social media users supporting BJP, Congress and Others on freedom to express opinion against the government on social media, however objectionable or offensive it may be

People should be free to say whatever they feel about their government on social media or WhatsApp, however objectionable or offensive their opinion may be

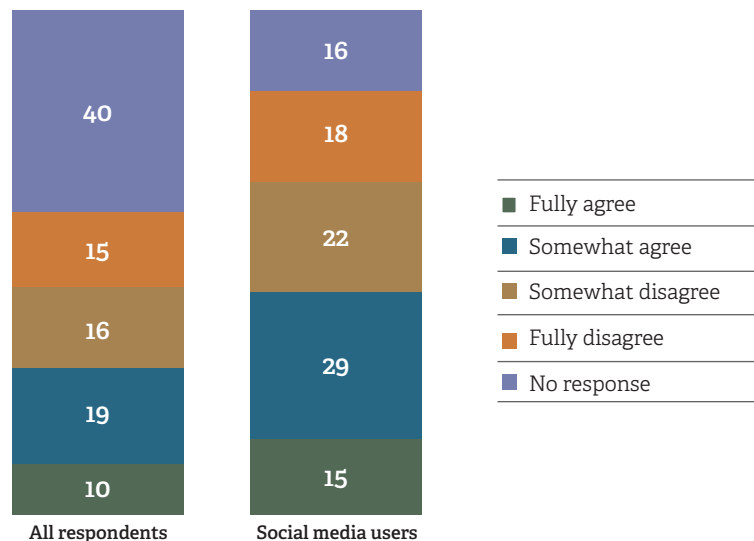


4.28: Supporters of all parties - Congress, BJP and Others - seem to have a similar opinion on the issue of posting views against the government that might be offensive. They were all slightly

more likely to oppose it than favour it. Please note that it is not clear which government (their local government or the national one) people had in mind while answering the question.

4.29: Opinion on whether social media and WhatsApp are safe places to express political opinions

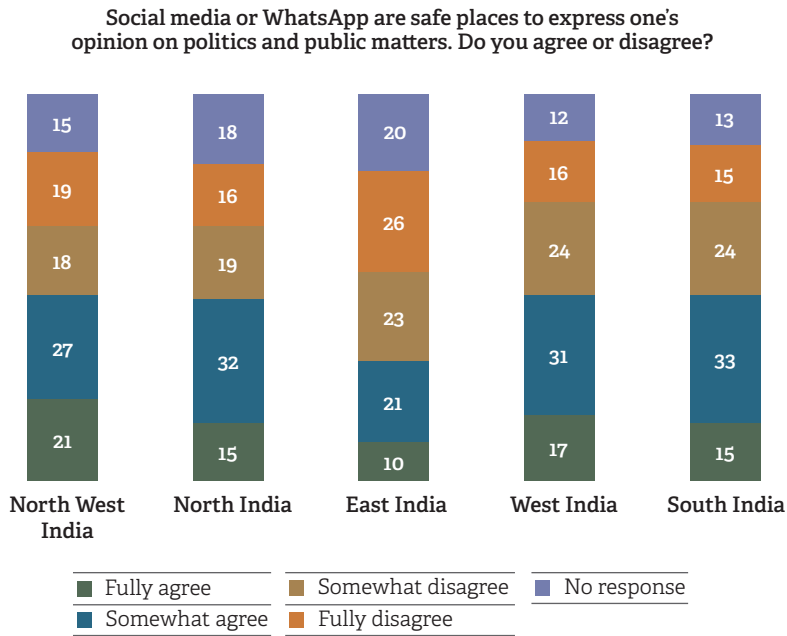
Social media or WhatsApp are safe places to express one's opinion on politics and public matters. Do you agree or disagree?



4.29: Most social media users are divided on the issue of whether social media and WhatsApp are safe places to express

one's opinion on politics; 44% think it is safe, 40% feel it isn't safe.

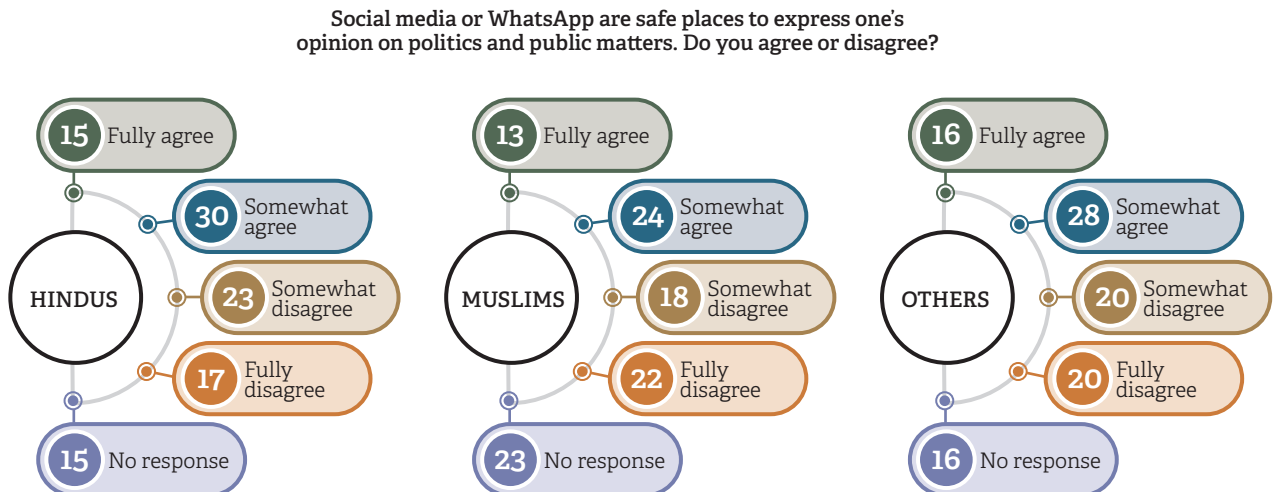
4.30: Opinion of social media users on whether social media and WhatsApp are safe places to express political opinions – Region-wise



4.30: Social media users of East India were far more likely to consider social media platforms and WhatsApp to be

unsafe places to express their political opinions than users in other parts of the country.

4.31: Opinion of social media users on whether social media and WhatsApp are safe places to express political opinions – Religion-wise

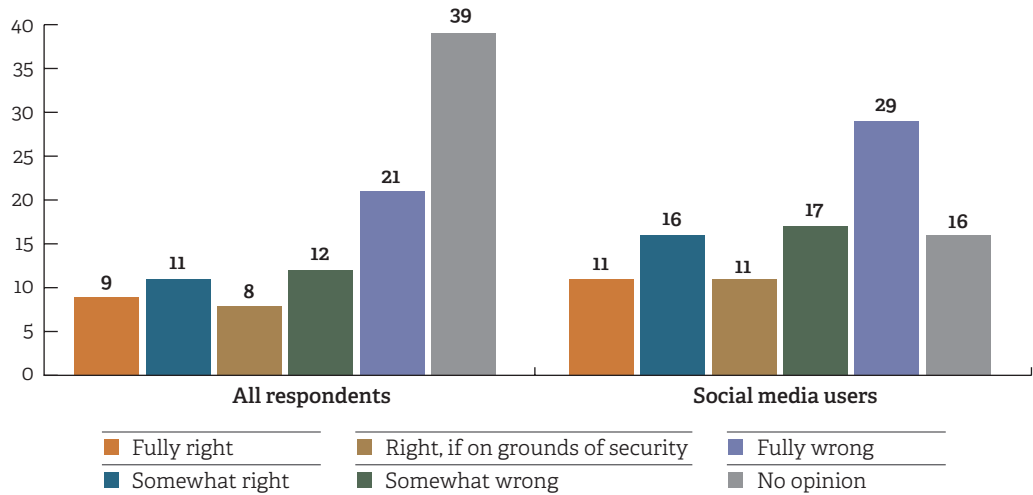


4.31: Social media users from the Muslim community were slightly more sceptical than others about social media and WhatsApp being safe places to express one's opinion on politics. In fact, unlike other communities, they were more

likely to see social media as an unsafe place than a safe one to express political opinions. Many Muslims also remained silent on the question and didn't express their opinion on the issue.

4.32: Opinion on government regulating social media content

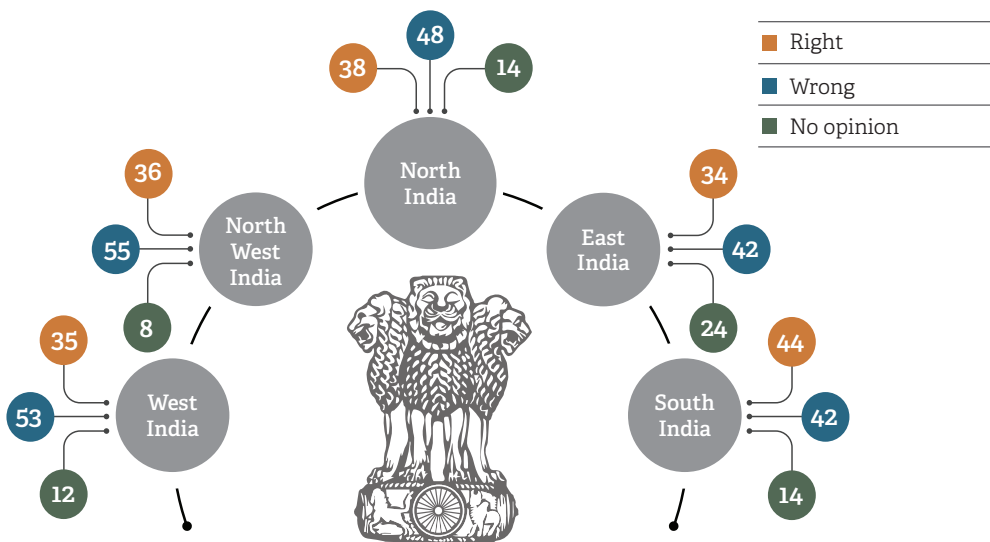
If any government determines what can or cannot be posted on social media or WhatsApp, then in your opinion, will it be right or wrong in doing so?



4.32: Social media users are more against (46%) than in favour (37%) of the idea of or cannot be posted on social media or Whatsapp. the government determining what can

4.33: Opinion of social media users on government regulating social media content – Region-wise

If any government determines what can or cannot be posted on social media or WhatsApp, then in your opinion, will it be right or wrong in doing so?



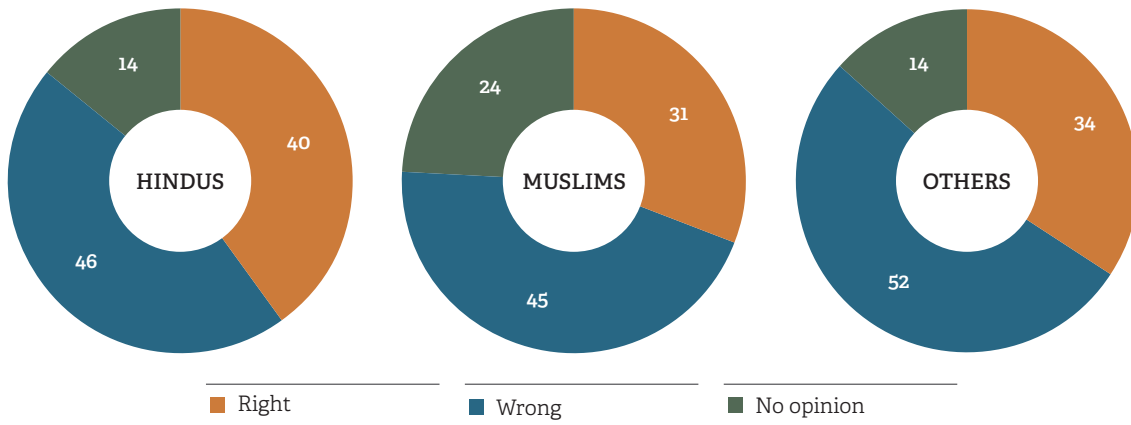
Note: Right = fully right + somewhat right + right on security grounds; Wrong = fully + somewhat wrong

4.33: South India was the only region where support for regulation of social media content by the government was slightly higher than opposition to it among social media users. Users in other

parts of the country were found to be mostly against government regulation of social media content, with the opposition being strongest in North West and West India.

4.34: Opinion of social media users on government regulating social media content – Religion-wise

If any government determines what can or cannot be posted on social media or Whatsapp, then in your opinion, will it be right or wrong in doing so?



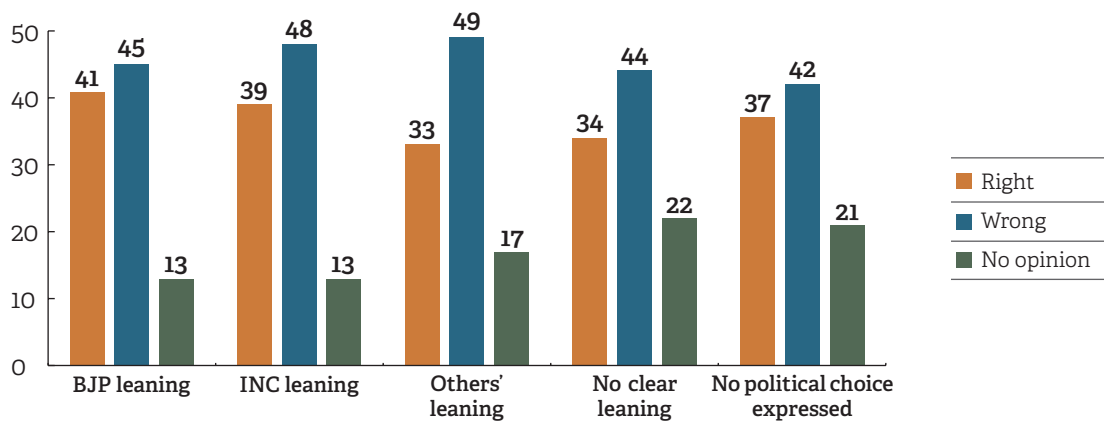
Note: Right = fully right + somewhat right + right on security grounds; Wrong = fully wrong + somewhat wrong

4.34: Of all religious communities, the strongest opposition to government regulation of social media content was among social media users from non-Muslim minority communities, especially Sikhs. Social media users

from the Hindu community were most supportive of the idea in relation to other communities. However, like the other communities, they too were more against the idea than in support of it.

4.35: Opinion of social media users supporting BJP, Congress and Others on government regulating social media content

If any government determines what can or cannot be posted on social media or Whatsapp, then in your opinion, will it be right or wrong in doing so?



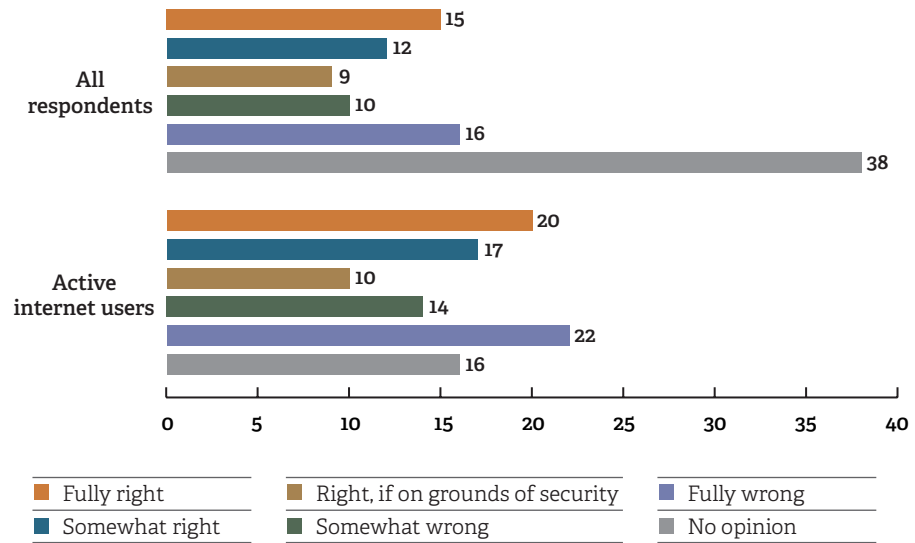
Note: Right = fully right + somewhat right + right on security grounds; Wrong = fully wrong + somewhat wrong

4.35: Supporters of regional parties (all taken together) are most opposed to government regulation of social media content in net terms. Those leaning towards the BJP are more likely to be in

favour compared to supporters of other parties. Having said that, a plurality of BJP supporters too are more opposed to the idea of government regulation than in its favour.

4.36: Opinion on internet shutdown by government on law and order grounds

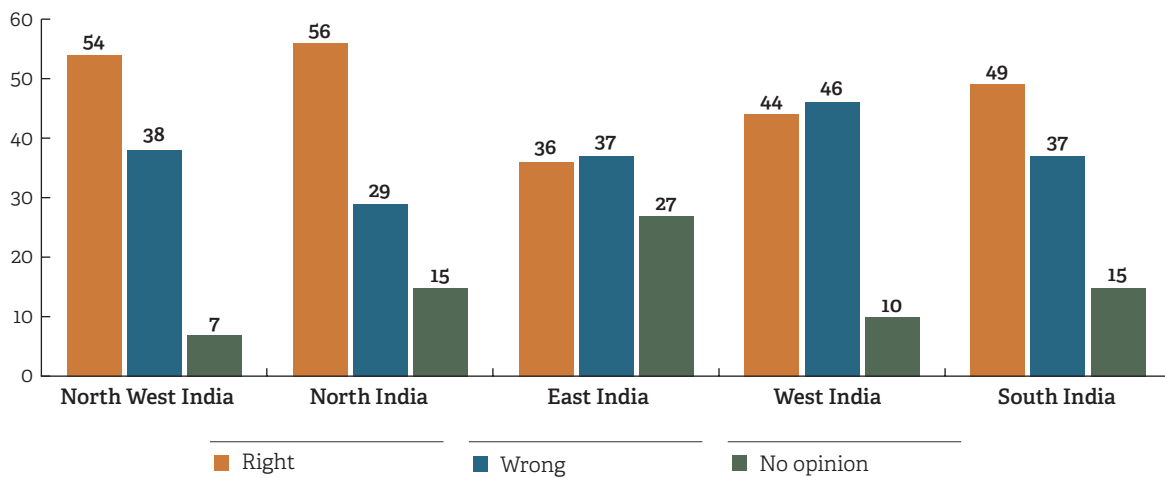
If any government shuts down internet services in an area for a certain period of time on law and order grounds, then in your opinion, will it be right or wrong in doing so?



4.36: Nearly half of all active internet users believe that government shutting down internet services in an area for a certain period of time on law and order grounds is justified; around two-fifths are against it.

4.37: Opinion of active internet users on internet shutdown by government on law and order grounds – Region-wise

If any government shuts down internet services in an area for a certain period of time on law and order grounds, then in your opinion, will it be right or wrong in doing so?

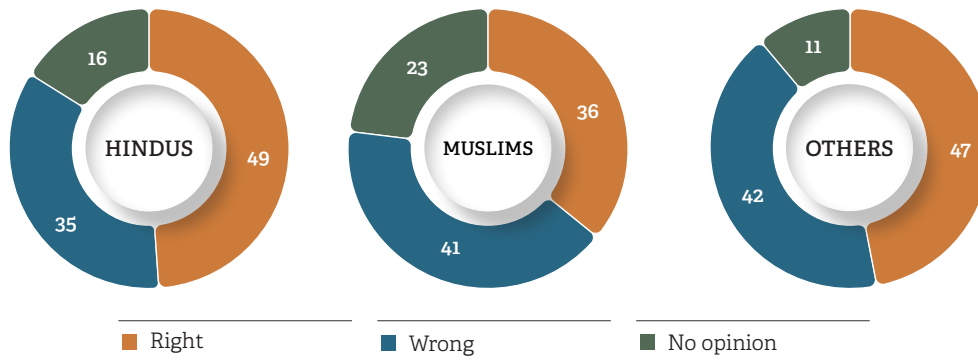


Note: Right = fully right + somewhat right + right on security grounds; Wrong = fully wrong + somewhat wrong

4.37: In net terms, support for internet shutdown on law and order grounds is greatest among active internet users in the Northern and North Western parts of the country. In West and East India more are opposed to internet shutdown than in favour of it. In East India many were non-opinionated on the issue as well.

4.38: Opinion of active internet users on internet shutdown by government on law and order grounds – Religion-wise

If any government shuts down internet services in an area for a certain period of time on law and order grounds, then in your opinion, will it be right or wrong in doing so?



Note: Right = fully right + somewhat right + right on security grounds; Wrong = fully + somewhat wrong

4.38: Muslims are more opposed to than in favour of internet shutdowns; Hindus are more in favour than opposed.

Except Sikhs, most non-Muslim minority communities are also mostly in favour than in opposition.



NEWS MEDIA
ENGAGEMENT
&
PREFERENCES

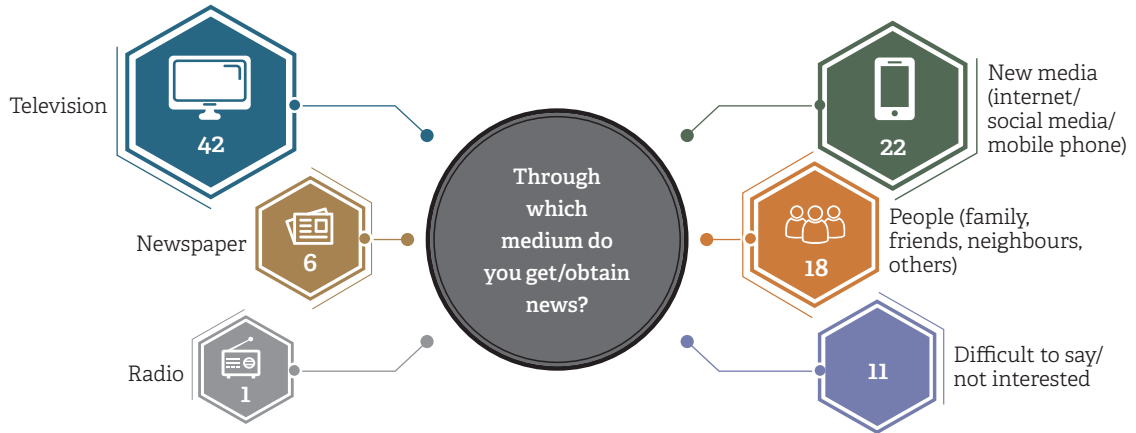
INTRODUCTION

An integral part of the media landscape in any country, particularly a democratic one such as India, is the news media. Not only does it inform and educate the people, it also acts as a watchdog, holding those in power accountable. While there are different opinions as to how effectively the media is executing this task, what cannot be disputed is that the Indian news media's sway over public opinion is the strongest it has ever been. This is indicated by the sheer number of news channels and newspapers operating in the country currently. Today, there are nearly 400 private news channels and roughly 10,000 daily print publications in the country. This is a very different situation from the situation in the developed world where the growth of traditional news media, especially print media, is said to have plateaued or declined. The demand for news among

Indians has grown steadily over the years, so much so that it now nearly rivals the demand for entertainment media, as highlighted in section 2 of this report. In fact, there is now a tendency among news networks to make news more entertaining and appealing. We can see this shift in the changes made to the kind of programming news channels air. Shifting away from the traditional, bulletin style of reporting, news channels now air anchor driven shows and debates. In the context of the growing importance of news and its changing nature, it is crucial to look at people's engagement with the news media and more specifically at their news preferences - from where people are accessing their news, what they prefer to engage with, and the format they prefer. In this section, we highlight the Media Survey's findings on some of these aspects.

PRIMARY NEWS SOURCE

5.1: Television still the most dominant news source

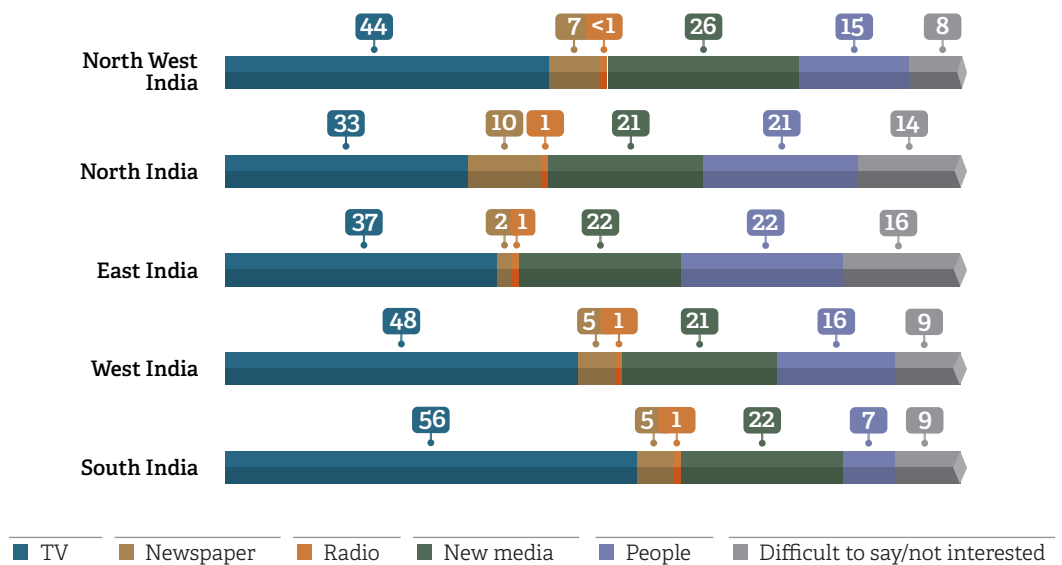


Note: Figures shown here and in the other charts in this section are percentages, unless specified otherwise.

5.1: When posed with an open-ended question about what their primary source for obtaining news is, over two-fifths of respondents said television. About 6% reported relying on newspapers and 1% said they get their news mainly via radio. On the other hand, the share of citizens who reported

getting news primarily through newer forms of media such as the internet, social media or mobile phones stood at 22%, or roughly one in every five. It appears that it may still take about a decade or so before the newer media forms eventually catch up with the older ones.

5.2: South India prefers TV as main news source more than any other region



5.2: TV's dominance as the main source of news cuts across all regions of the country. It is however extremely strong in South India, sitting at 56%, 14 percentage points higher than the national average. New media is most common in the North West, with 26% of individuals from the region citing it as their primary means to engage

with the news. Many in East and North India reported relying mostly on word of mouth, and not on any media source, to obtain news. In these two regions, the role of the television as a source of news is thus significantly lower than the rest of India. One of every seven respondents in these two regions also reported not being interested in news at all.

5.3: Who prefers which medium the most to obtain news?

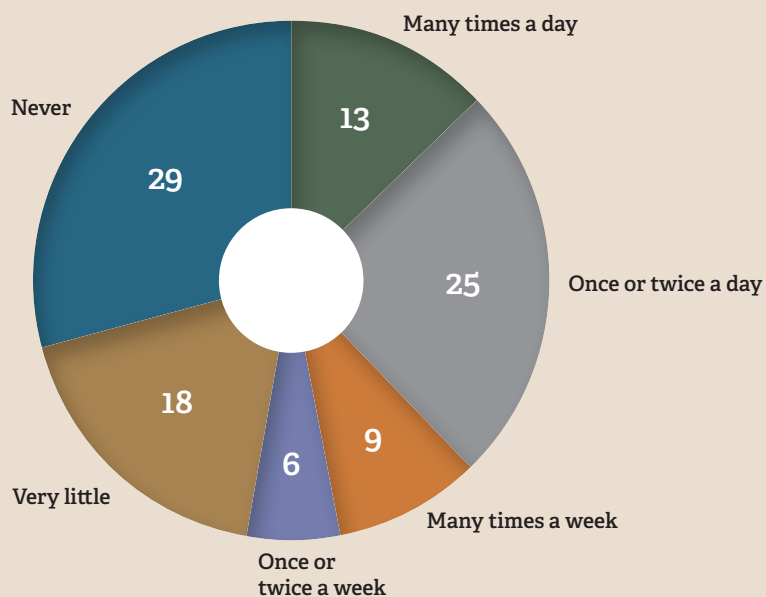
	TV	Newspaper	Radio	New media	People	Difficult to say/not interested
Locality						
Village	39	4	1	21	21	14
Town	48	10	<1	22	12	8
City	52	7	1	23	8	10
Big City	47	12	<1	27	8	6
Age group						
15-17	37	5	<1	39	8	10
18-25	35	6	<1	45	8	7
26-35	41	4	1	30	14	10
36-45	44	6	1	19	18	11
46-55	51	5	1	9	22	12
56+	40	8	2	5	27	19
Gender						
Female	42	4	1	15	21	17
Male	43	7	1	29	14	7
Economic Class						
Poor	32	3	1	14	26	24
Lower	42	4	1	16	22	14
Middle	48	6	<1	26	12	7
Rich	44	14	<1	35	5	3
Education						
Non-literate	29	1	1	4	38	27
Primary school	45	3	1	11	26	14
Middle pass	48	6	1	18	15	12
High school	48	7	1	30	8	6
College and above	41	11	<1	43	2	2

5.3: A thorough disaggregated analysis of the responses on socio-demographics such as urbanity, age group, gender, class and education reveals that the only segments of the population where new media does better than TV in terms of being the primary source of news is among the youth (15-25 year olds) and the college educated. Among all other segments of the population it is TV that still dominates as the main source of obtaining news. As one moves to older age groups, the dependence on new

media declines while the importance of word of mouth communication increases. If among men, new media is seen as a more important source of news, women tend to rely more on informal communication through people. The dependence on the new media for news increases with economic affluence and the dependence on people declines. The same trend is visible when the level of access to education is taken into account.

NEWS CONSUMPTION

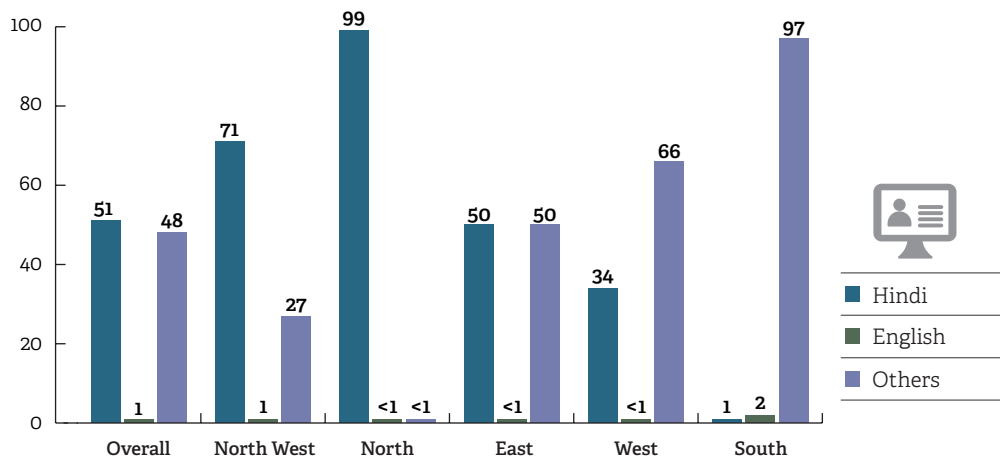
5.4: Around two-fifths of Indians watch news channels on a daily basis



5.4: The survey asked people about how regularly they watched news channels on any media platform (not necessarily TV). 38% said they watch news channels on a daily basis. 15% watch them on

a weekly basis and 18% do so rarely. There is a sizable proportion of Indians – three of every ten – that never watch news channels.

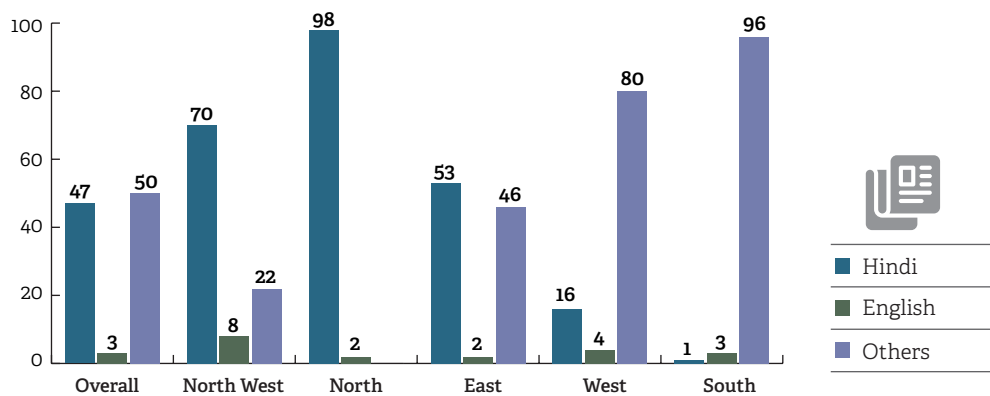
5.5: Language in which news channels are being watched the most



5.5: Half of news channel viewers watch their news in Hindi and slightly less than half in non-Hindi regional languages. Quite surprisingly, only 1% said they mostly watched English

news channels. In fact, English news channels are hardly viewed anywhere outside South India. Their viewership is also mostly restricted to big cities (4% as per the survey).

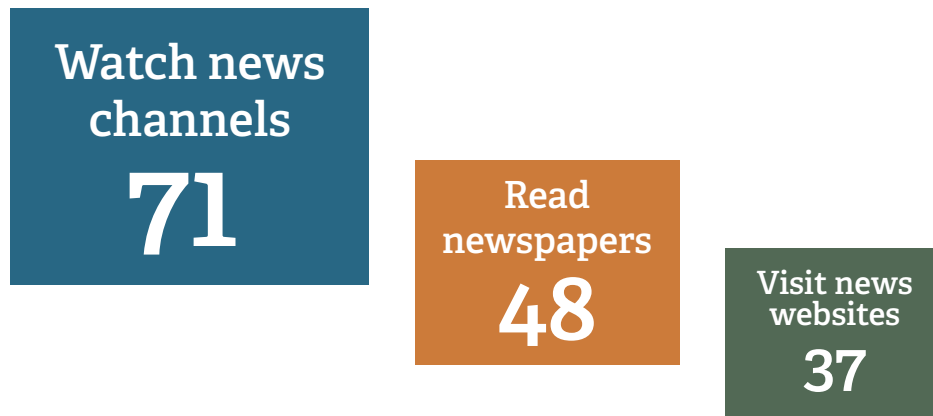
5.6: Language in which newspapers are being read the most



5.6: The trends surrounding newspaper readership mirror what is seen with respect to television. Most newspaper readers (48% read newspapers – see Section 2) prefer reading their newspaper in either Hindi or regional languages. The proportion of newspaper readers who mostly read English newspapers is greater than those who watch the news in English, but is still just 3%. English newspapers

are being read far more in North West India (8%) than in any other region. This is largely due to their readership being concentrated in Delhi. About a quarter of the newspaper readers in the national capital said that they mostly read English newspapers. Overall, in big cities, 15% of newspaper readers reported reading the newspaper mostly in English.

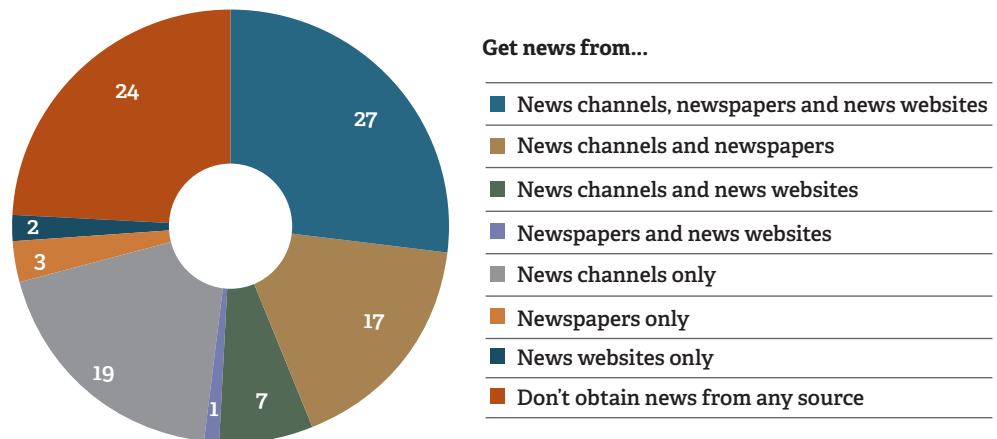
5.7: Proportion of 15+ Indians accessing news through various means



5.7: According to the survey, seven out of ten Indians watch news channels, around half read newspapers and

around two-fifths access news through news websites.

5.8: Index of news consumption: three-fourths Indians are news consumers



Note: Figures have been rounded, hence they may not add up to the total figures given in 5.7

5.8: Based on citizens' responses to three questions that sought to find out about their news consumption via three different means - news channels, newspapers, and news websites, we constructed an Index of news consumption (see Appendix for details) to figure out just how many citizens are consuming news. The results show that a little over one-fourth (27%) of citizens keep track of news through all the three sources. Around one in every six (17%) gets their news from news channels and newspapers, 7% from

news channels and news websites, and 1% from newspapers and news websites. Around 19% rely entirely on news channels, 3% entirely on newspapers and 2% entirely on news websites. One in four citizens (24%) does not bother about obtaining news through any of the three means. They are either not interested in news or depend on other people for their information and not any media source. Overall then, three-fourths (76%) of citizens can be considered as news consumers.

NEWS PREFERENCES

5.9: More interest in local news than national news

Type of news most preferred by news consumers



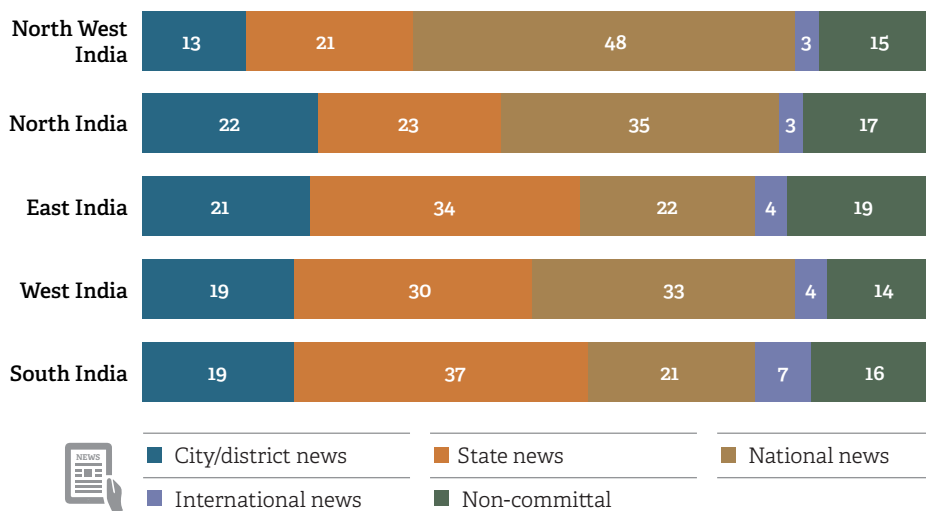
Question asked: Generally, what kind of news do you like to read/watch/listen to the most – local news from your city/district, news from your state, news from different parts of the country or news of events happening abroad?

5.9: The survey tried to assess the kind of news that news consumers¹ liked to watch or read – hyper-local (city/district news), semi-local (state news), national (India-wide) or international. Half of all the news consumers opted for the two

local options – two of every ten said city/district news and three of every ten showed greater interest in state news. National news on the other hand was preferred by three of every ten news consumers.

5.10: North West India only region where national news is more preferred than local news

Type of news most preferred by news consumers

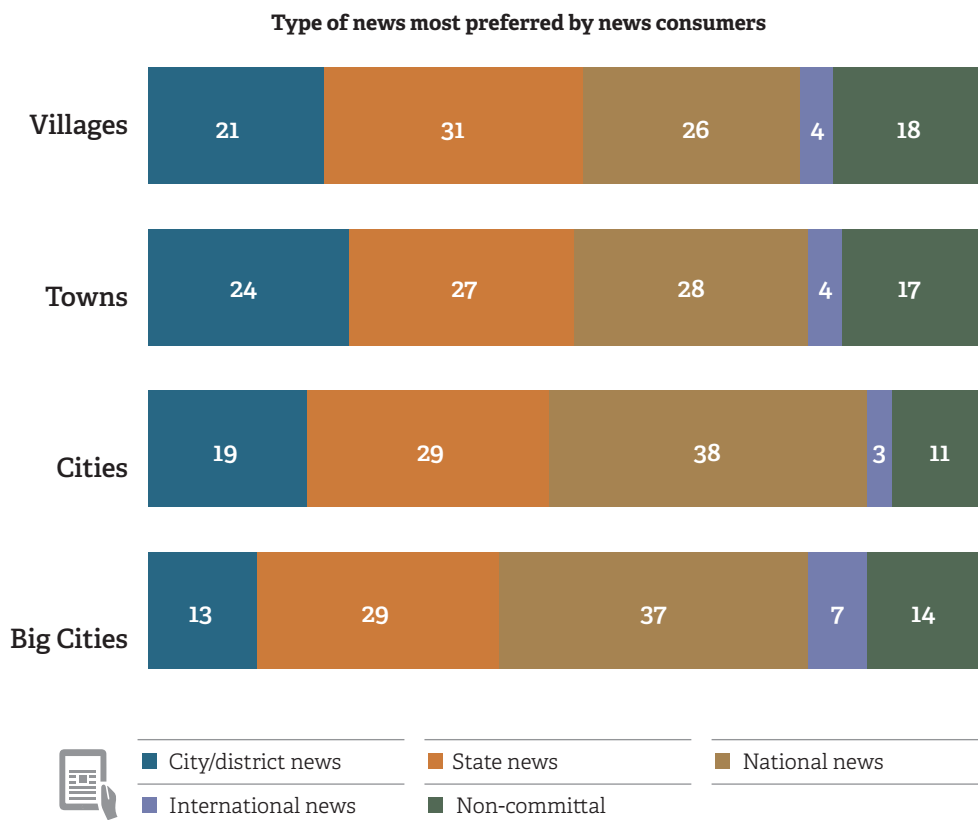


¹ News consumers here refer to those who keep track of news through television, newspapers or news websites, including those who do so rarely. The survey found 76 percent of the respondents to have such proclivity.

5.10: The preference for local over non-local news was seen across all regions except one - North West India. In fact, the strongest preference for national news was found among news consumers of Delhi and Haryana, both part of NW India. Rajasthan (part of North India as per our classification) too leaned more towards national news. As far as state news is concerned, it was most strongly preferred in Assam,

Chhattisgarh, Odisha and Andhra Pradesh. Hyper local news was more strongly preferred in Tamil Nadu, Gujarat and Madhya Pradesh compared to other States. Although international news was the least preferred across all the States, it was nonetheless far more of a preference in the Southern states, especially Telangana, Andhra Pradesh, Karnataka and Kerala.

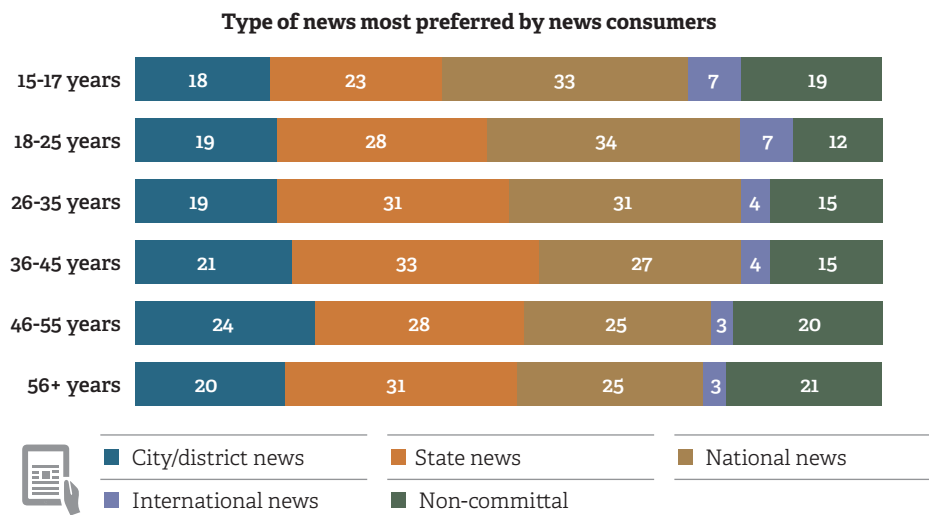
5.11: Cities less interested in local news and more in national



5.11: News consumers in the cities stand out in their preference for non-local news. They are most likely to consume national news compared to news consumers in towns and villages. Moreover, they are also the least likely to prefer watching or reading news about their city. The location of the news consumer, in fact, seems to

matter quite a lot, at least as far as the preference for national news is concerned. Those residing in villages are the least likely to take interest in national news; as urbanity increases, interest in national news also increases.

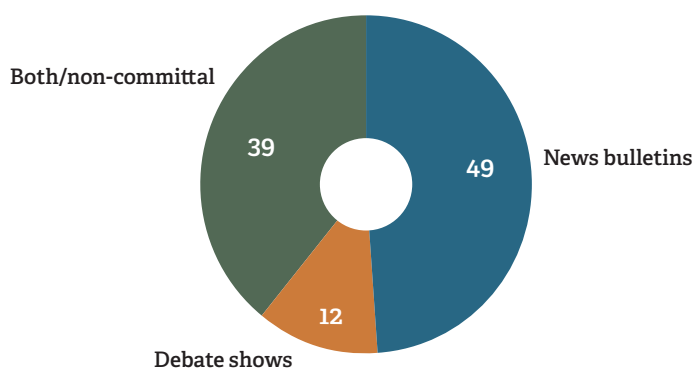
5.12: Young more likely to prefer national news; elderly interested in local news more



5.12: Interest in national and international news also seems to be a function of age. Younger people are more likely to follow national news more than anything else compared to the older age group. Similarly, they were

also more likely to opt for international news than their older counterparts. Older age groups, on the other hand, tend to opt for the local news options more.

5.13: News bulletin format preferred more than debate format

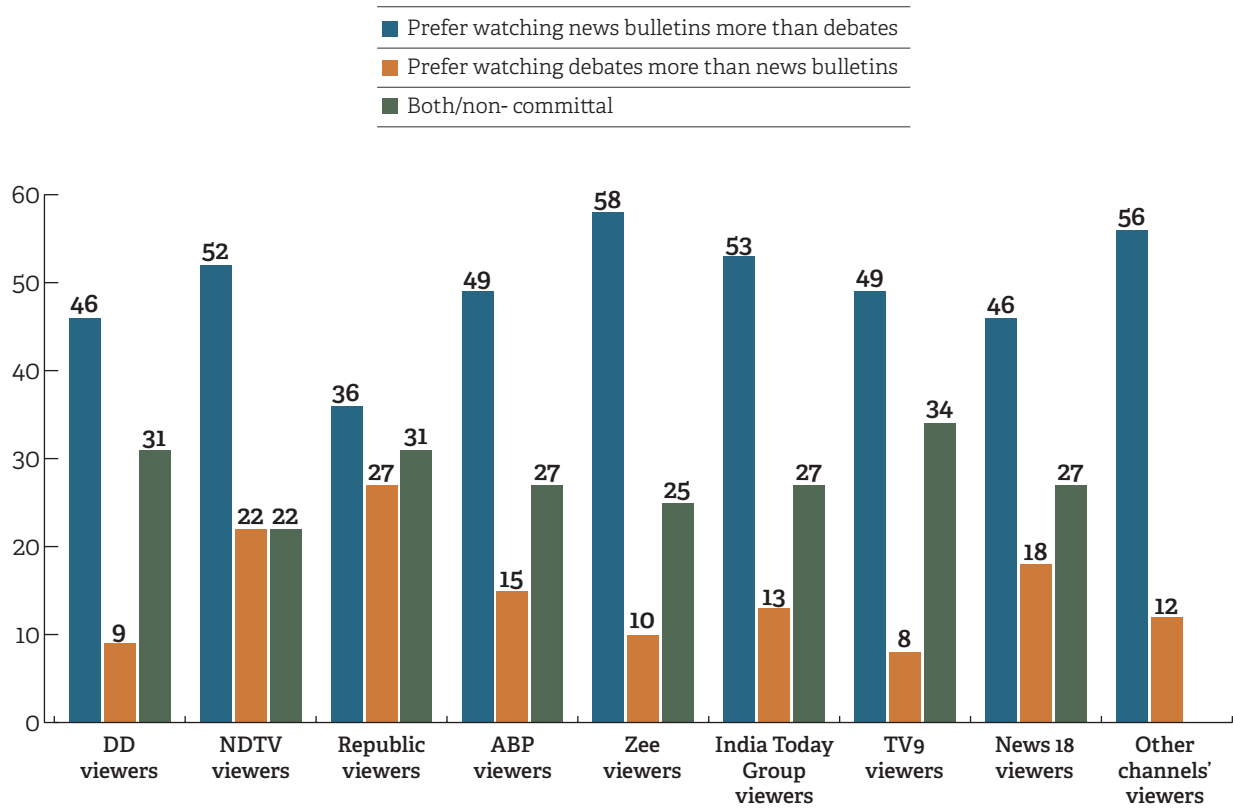


Question asked to those who watch news channels: Between these two types of programmes on any news channel, which do you generally prefer watching more – a news bulletin that shows news and reports one after another or a programme where particular news is discussed and debated by experts or politicians?

5.13: Almost all news channels today run debate shows during the evening hours and occasionally during the day, suggesting a broad consensus in the news media industry; debate shows work better than any other format. Interestingly, though, the survey found most news channel viewers to favour a traditional news bulletin over a debate.

When given a choice between the two formats, close to half chose the bulletin format and roughly one in ten who opted for the debate format. Close to four of every ten either said both or stayed non-committal on the issue indicating that the type of format that news is delivered in is not really an issue for them.

5.14: Republic's avid viewers were least likely to opt for bulletins and most likely to prefer debates



Note: Viewers here refers to those who said that they watch a news channel of the media group the most

5.14: Given that some news channels do debate shows more than others, one expected viewers of different channels to hold different opinions on the issue. However no major difference was noticed and no clear trend emerged. Irrespective of the news channel, viewers said they were more likely to

favour a news bulletin over a news debate show. The only segment of viewers among whom this opinion was not clearly articulated was the viewers of Republic TV. They were far less likely to prefer a news bulletin format and more likely to prefer the debate format compared to viewers of other channels.

6

PERCEPTION
ABOUT AND
TRUST IN
NEWS MEDIA

INTRODUCTION

Even as the Indian news media has grown by leaps and bounds during the last two decades, its credibility appears to have taken a hit in inverse proportion. A large section of the news media in the country has come in for an enormous amount of flak in recent times for its sensationalist and partisan coverage of news and for failing to discharge its duty of holding those in power accountable. There is a growing sense that instead of acting as a watchdog of the authorities, which is supposed to be one of the media's primary tasks, the Indian news media is acting instead as their lapdog and mouthpiece. There is also concern that the news outlets are not focusing enough on substantive issues that affect common people. Instead, they're seen as diverting attention away from these issues, by highlighting divisive matters, and inciting hatred against religious minorities. Much of this too is believed to be happening under some sort of pressure. While not all journalists and media persons have succumbed to this pressure and continue to report

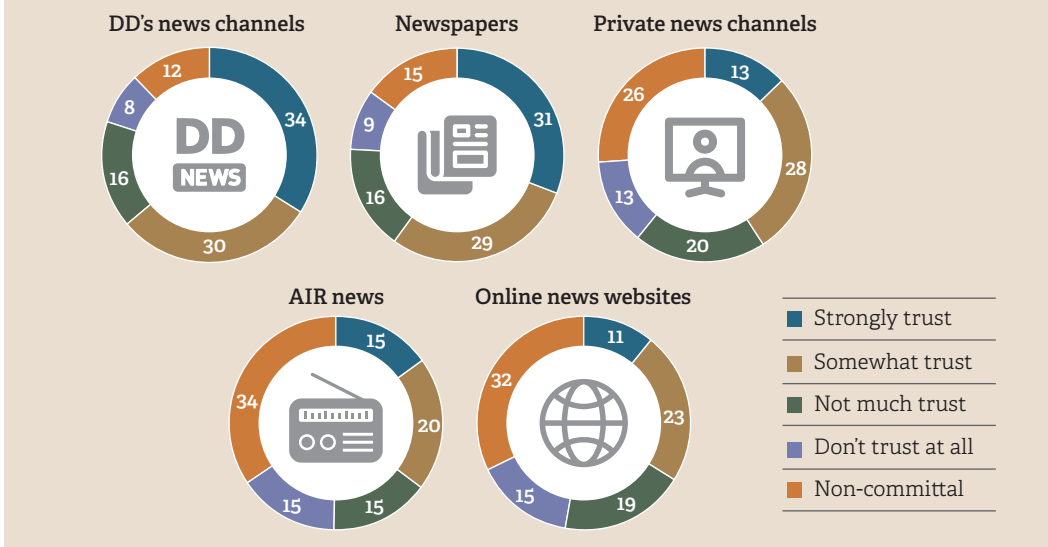
honestly and express themselves fearlessly, there have nonetheless been several instances of journalists, especially independent ones, being intimidated, harassed and even put behind bars for their work. A study released recently found that as many as 154 journalists were arrested, detained or interrogated in India between 2010 and 2020¹. Two-fifths of these cases were reported in 2020 alone. Moreover, in the World Press Freedom Index², which highlights the degree of freedom that journalists, news organisations and internet users have in each country, India's ranking has continued slipping downwards during the last few years and now sits at 150 out of 180. In the light of this situation and the numerous concerns regarding media freedom and media prejudice in the country today, the Lokniti-CSDS Media survey attempted to find out what Indian news consumers think about these issues. The survey posed to them questions about trust in media, media bias, state of media freedom and media coverage. This section reports those findings.

1. 'Behind Bars: Arrests and Detentions of Journalists in India 2010-2020', a report by Free Speech Collective available at <https://freespeechcollective.in/2020/12/24/behind-bars-arrests-and-detentions-of-journalists-in-india-2010-2020/>

2. Reporters Without Borders' 2022 World Press Freedom Index available at <https://rsf.org/en/rsf%E2%80%99s-2022-world-press-freedom-index-new-era-polarisation-0>

TRUST IN NEWS MEDIA

6.1: Trust in various news media among consumers of those media

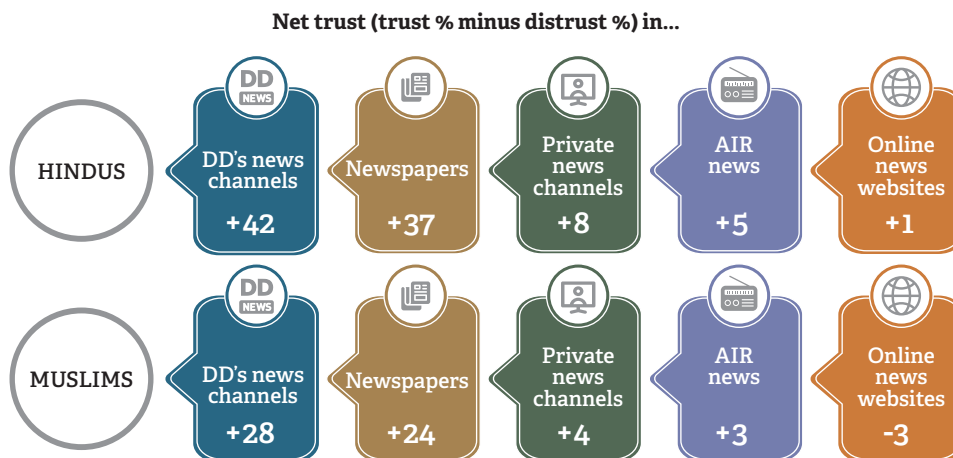


Note: Figures shown here and in the other charts in this section are percentages, unless specified otherwise.

6.1: Of all news media, Doordarshan (DD) operated news channels are the most trusted (64%) and online news websites are least trusted (34%). Private news channels fare worse than newspapers; viewers of news channels are far less likely to trust them than newspaper readers are to trust newspapers. Only 41% trust (strongly or somewhat) private news channels as

opposed to 60% who trust newspapers. Newspapers, in fact, are nearly as trusted by newspaper readers as DD's news channels are trusted by DD news viewers. Interestingly, even as DD's news is highly trusted by its viewers, news aired on All India Radio (another public broadcaster) does not enjoy the same level of confidence among radio listeners.

6.2: Muslims are less trusting of all types of news media than Hindus



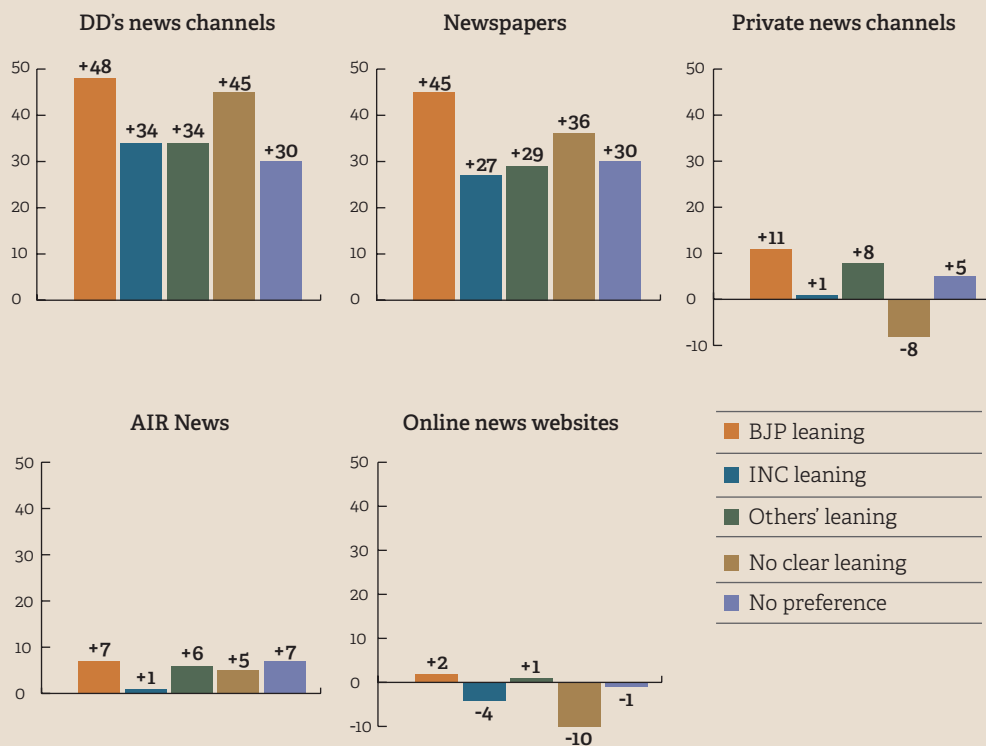
Note: Other religions have not been shown in the table as sample size for disaggregates was too low. Net trust is Trust (quite a lot and somewhat trust) percentage minus Distrust (not much trust and no trust at all) percentage

6.2: The data shows that Muslim news consumers are less trusting of the news media (all types of it) than Hindu news consumers are, even though the order of trust among both the communities is the same. The biggest gap in trust levels between Hindus and Muslims is seen

with respect to DD's news channels and newspapers. Both Hindus and Muslims are least trusting of online news websites. Their trust levels in private news channels and AIR news is quite low too.

6.3: Partisan divide in news media trust

Net trust (trust % minus distrust %) in...

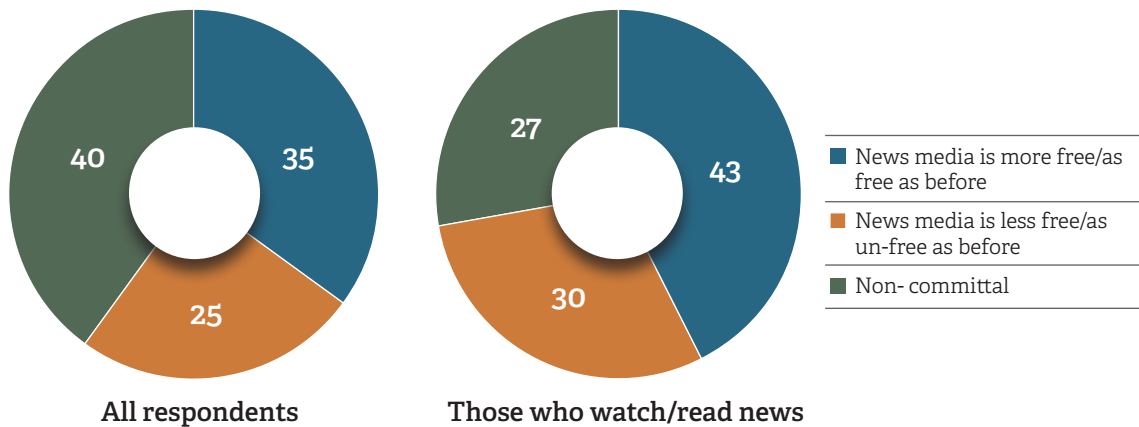


6.3: There is a clear partisan divide as far as trust in the news media is concerned. Those leaning towards Congress and regional parties are less trusting of all types of media compared to those inclined towards the BJP. Congress supporters are, on average, the least trusting. That said, the order/pattern of trust remains the same among supporters of all parties – DD's news channels are the most

trusted, newspapers are the second most trusted, private news channels and AIR news enjoy very little trust, and online news websites are the least trusted. Interestingly, the trust levels of the non-partisans (those who did not disclose their leaning or had no clear leaning) is closer in most cases to trust levels shown by supporters of Congress and regional parties than supporters of the BJP.

PERCEPTION ABOUT MEDIA FREEDOM

6.4: Plurality believes that Indian news media is freer or as free as before to show the truth

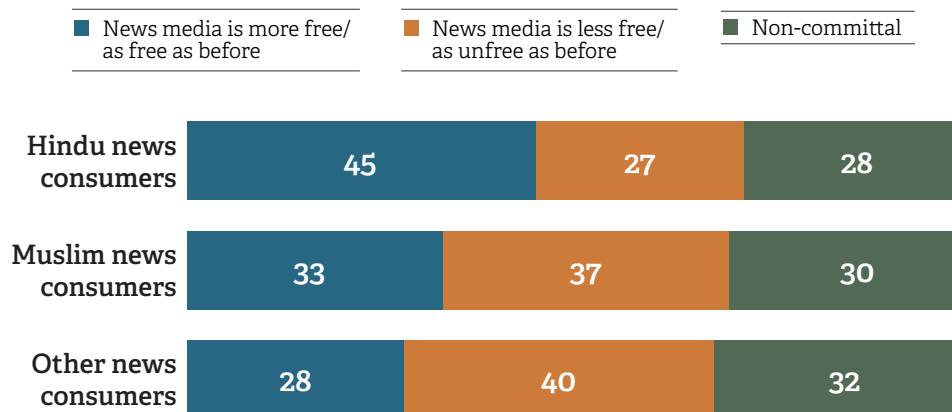


Question asked: In your opinion is the news media in India these days freer to show the truth compared to a few years ago or is it less free to do so?

6.4: In light of several concerns being raised about the state of media freedom in India and the fact the country has been performing poorly on the World Press Freedom Index, the survey tried to gauge the mind of Indians on the issue. Quite surprisingly, the survey found that a plurality of people hold a positive opinion about the current state of media freedom in India. Over two-fifths of news consumers (those who watch/read news) said that the Indian news media is free to show

the truth (33% thought it is freer than before and 10% said it is as free as before). Only about one-third thought otherwise – that it isn't free (25% said it is less free and 5% said it is as unfree as before). Interestingly though, one-fourth of news consuming respondents were non-committal on the question preferring to stay silent on the issue perhaps indicating that the issue of media freedom isn't a top of mind issue for many.

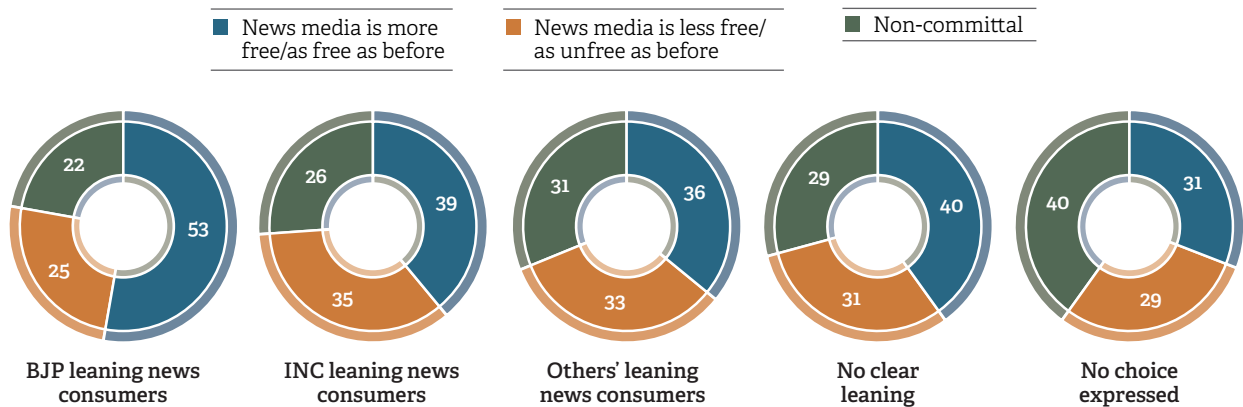
6.5: Perception about freedom of news media among Hindus, Muslims and others



6.5: Like their responses when asked about their trust in media sources, Hindu respondents and those from religious minorities were not in agreement when asked about the press' freedom as well. While a plurality of

Hindu news consumers thought that the media is free to show the truth nowadays, a plurality of Muslim news consumers and those from other minorities opined otherwise.

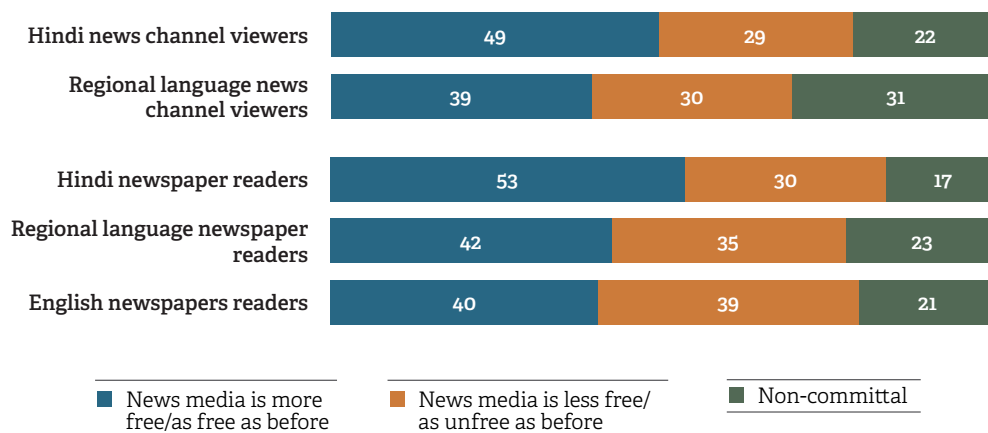
6.6: Perception about freedom of news media - by the political leaning of news consumers



6.6: It is believed that at times the public only consumes what reaffirms its own biases and opinions. The perception that the news media is more free/as free as earlier was the strongest among those who lean towards the BJP with a little over half of them feeling so. The Congress supporters on the other

hand were quite divided on the issue – 39% of them thought that the media is freer/as free as before and 35% thought it was less free/as restricted as before. Supporters of regional parties who gave an opinion on the issue were also almost equally divided on the question of media freedom.

6.7: Perception about freedom of news media - by language in which news is mostly consumed



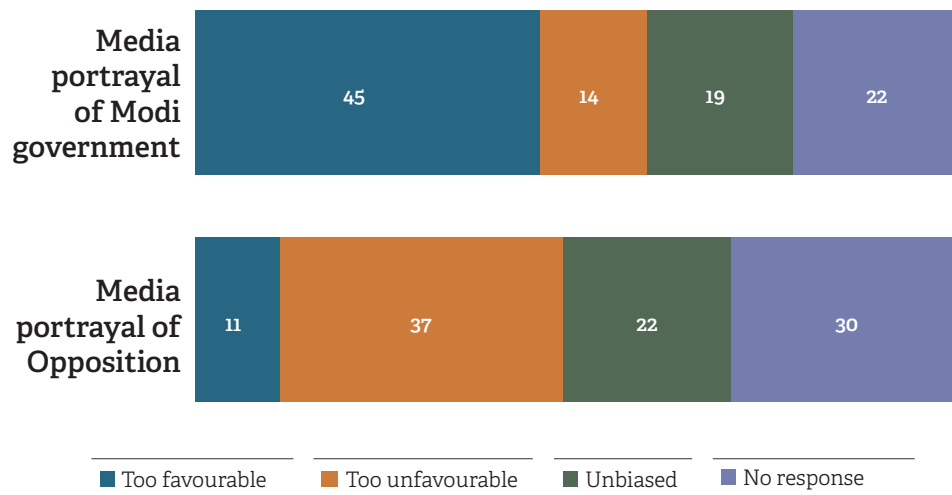
Note: Figures for English news channel viewers not shown as sample size is too low

6.7: There is a difference between the perception of Hindi and regional language news media consumers on the issue of media freedom. Hindi news channel viewers and newspaper readers are more opinionated on the issue, and are more likely to believe that the news media in India is free to show the truth compared to those who watch and read news in regional languages. This

is most probably due to the pro-BJP tilt in the Hindi-speaking States and the weaker appeal of the BJP in many of the non-Hindi ones. English newspaper readers are split down the middle on the issue with 40% saying that media is freer and 39% holding the opposing view. We are not in a position to share the opinion of English news channel viewers because of a very low sample size.

PERCEPTION ABOUT NEWS MEDIA BIAS

6.8: Perception of news media consumers about news media's political bias



6.8: The ethics of journalism focus on news reporting that is fair, impartial, truthful and verifiable. The survey asked consumers of news media for their opinion on whether or not the media had a political bias towards the Modi government and those opposed to it. It was found that nearly half (45%) of them believe that the news media portrays the Modi government too favourably in its coverage. Only about one in seven (14%) feel as though it is portrayed in an unfavourable or inadequate fashion. On the question of the portrayal of the opposition parties, close to two-fifths

(37%) believe that they are portrayed too negatively or inadequately by the news media in general and only one in ten (11%) believe they are portrayed too positively. In response to both the questions, only around one in five news consumers said that the media in India gives balanced political coverage – neither is it too favourable towards the government/opposition nor is it too unfavourable. Interestingly, the response rate to the question regarding media bias towards the Modi government was much higher than the response rate to the question related to the opposition.

6.9: Perception of news media consumers about news media's political bias - by their religious identity

	Too favourable	Too unfavourable	Unbiased	No response
Media portrayal of Modi government				
Hindu news consumers	46	13	20	21
Muslim news consumers	46	13	15	26
Other communities' news consumers	39	14	11	36
Media portrayal of Opposition				
Hindu news consumers	12	36	24	28
Muslim news consumers	8	42	17	33
Other communities' news consumers	7	34	15	44

6.9: Both Hindus and Muslims who consume news through various media sources are equally likely to believe that the Modi government is portrayed too favourably by the news media (46%). On the issue of media portrayal of the

Opposition too there is consensus across religious communities that the news media is biased against the opposition. However, one must note that Muslims are slightly more likely to believe so than Hindus.

6.10: Perception of news media consumers about news media's political bias - by their political leaning

	Too favourable	Too unfavourable	Unbiased	No response
Media portrayal of Modi government				
BJP leaning	51	11	24	14
INC leaning	46	20	13	21
Others' leaning	43	17	15	25
No clear leaning	40	14	19	27
No preference	33	8	15	44
Media portrayal of Opposition				
BJP leaning	13	36	30	21
INC leaning	12	45	17	26
Others' leaning	9	42	17	32
No clear leaning	14	35	20	31
No preference	7	25	18	50

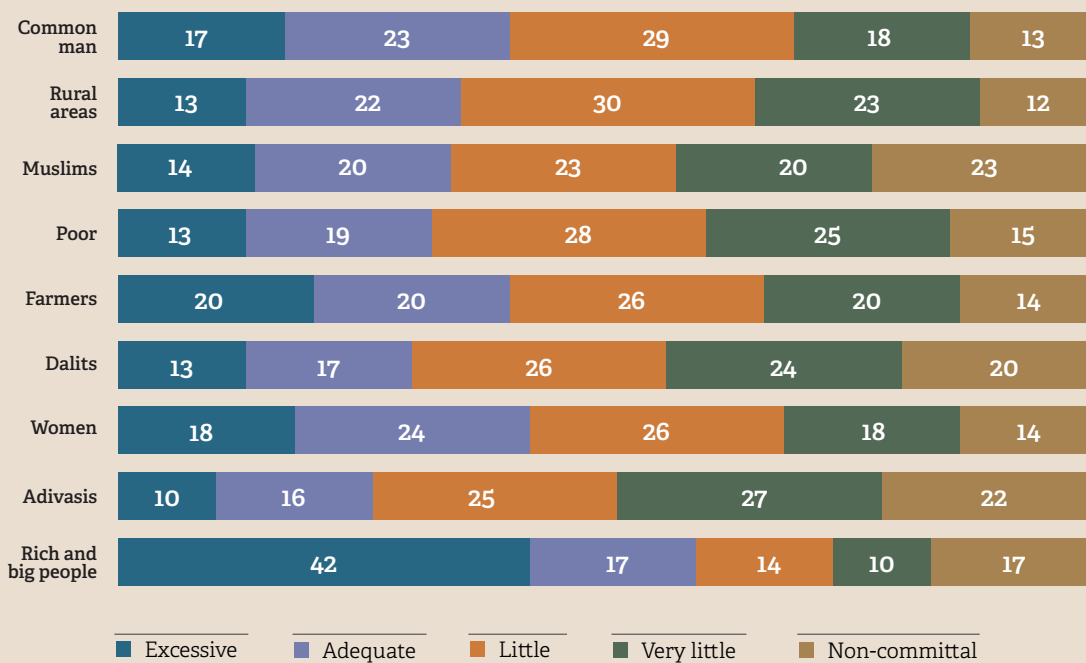
6.10: When different media sources favour parties, they end up attracting an audience that shares similar beliefs and supports them as a credible source, disengaging the audience that does not already hold their political opinions. This prompts them into thinking of these channels as unreliable sources of information. Surprisingly, the data shows that not just citizens leaning towards the opposition parties, but BJP-leaning citizens too are likely to believe that the news media is too pro-Modi government and anti-opposition in its coverage. Over half (51 %) of those leaning towards the BJP felt that the media's portrayal of the Modi government is too favourable. This view was also held by supporters

of opposition parties with around 45% agreeing that the media is too favourable in its coverage of the Modi government. Nonetheless, it is interesting that this figure was below that of those leaning towards BJP. It perhaps indicates that even though BJP supporters are more likely to acknowledge media bias in favour of the Modi government, many of them do not necessarily view it as a bad thing. Overall, there is an acknowledgment by party supporters cutting across the political divide that the media is politically biased. Even if we look at those having no clear leaning, the plurality feels that the media is pro-Modi government (40%) and anti-opposition in its coverage (35%).

MEDIA COVERAGE OF KEY SECTIONS

6.11: Perception of news media consumers about news media's coverage of key sections of society

Attention given by news media to issues and problems of...

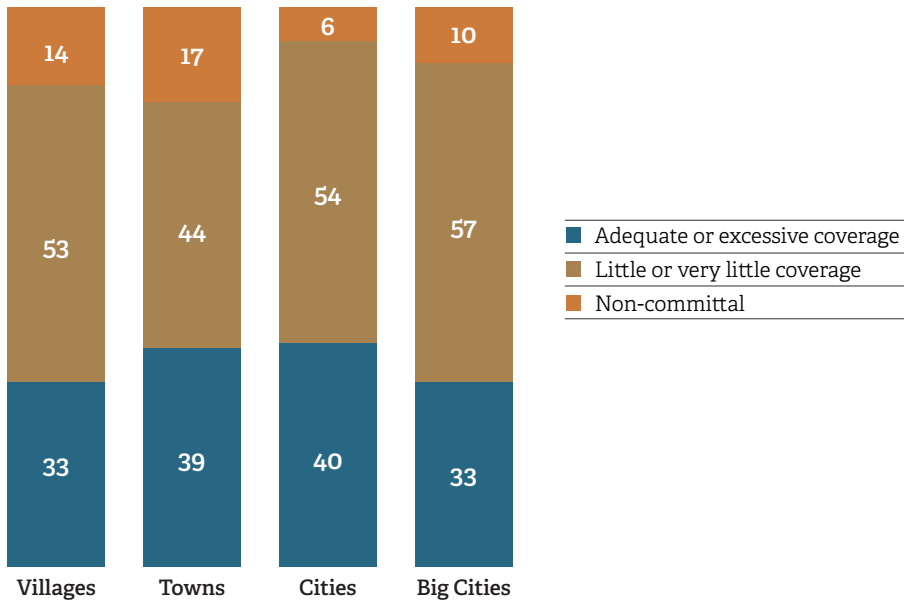


Question asked: Do you think the attention given by the news media to the issues and problems of these people/sections is a lot, as much as it should be, little or too less?

6.11: What do the consumers of news media feel about the coverage given to key sections of the society by the Indian news media today with respect to gender, ethnicity, economic class, area of residence etc.? The data shows that the majority of news media consumers believe that the media is giving little or no attention to the issues and problems of those belonging to the marginalised sections of society. Adivasis, the poor, Dalits and rural citizens are perceived as

being the most neglected by the news media. The common man, farmers, women and Muslims are also more likely to be seen as being neglected by the news media than being given attention by it. The only section that the news media audiences perceive as being well covered by the media are the rich - over two-fifths believe that there is excessive coverage by the news media of the issues and concerns of the rich.

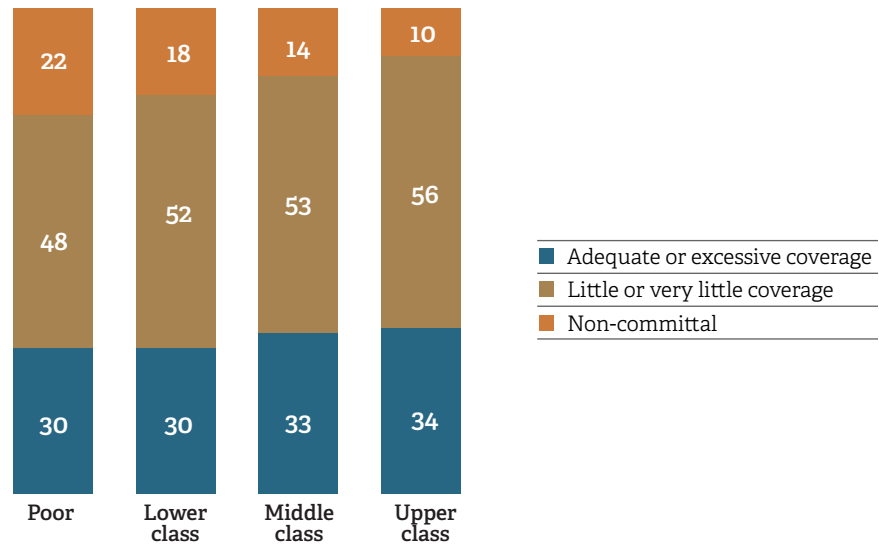
6.12: Perception about news media’s coverage of Rural areas - by area of residence



6.12: On the question of news media’s coverage of the issues and problems of the rural areas, the data highlights that it is not just those residing in villages who are likely to believe that the Indian

news media is ignoring the issues and concerns of the villages, but a majority of city dwellers as well. In fact those residing in cities are slightly more likely to believe so than those living in villages.

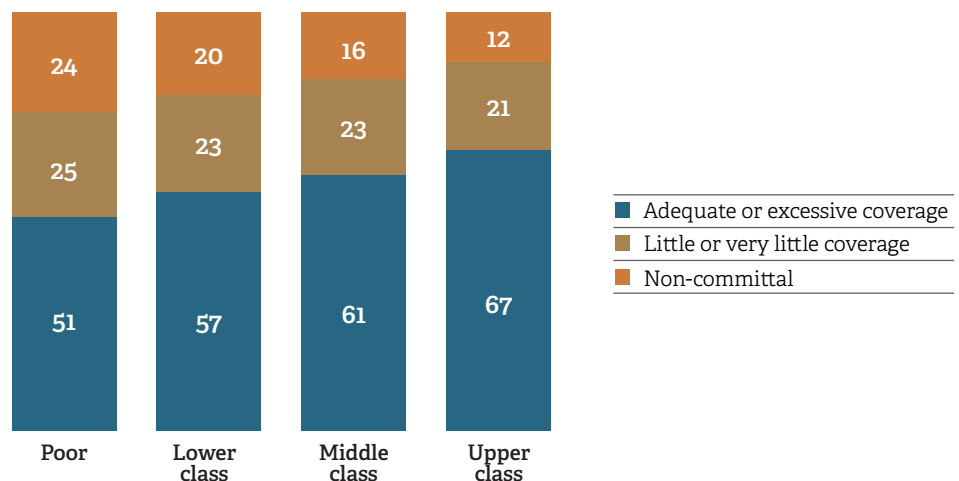
6.13: Perception about news media's coverage of issues of the Poor – by economic class



6.13: A majority of news media consumers from all economic classes are of the opinion that issues surrounding the poor and economically weaker sections are inadequately represented in the news media. This view is the strongest amongst those who are

economically better off (close to three-fifths) than the poor (close to half). This difference can be because the rich were more opinionated and vocal on the issue compared to those belonging to the economically weaker sections of society.

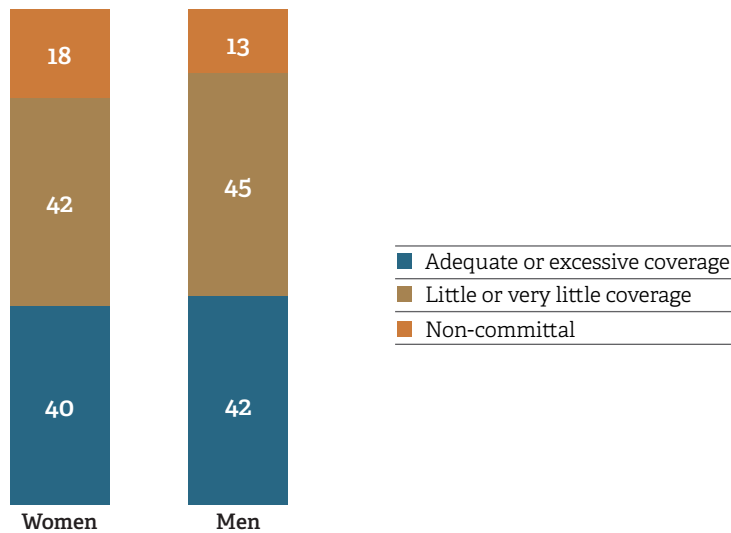
6.14: Perception about news media's coverage of issues of the Rich – by economic class



6.14: On the question of news media coverage on the issues and problems of the rich and powerful; those belonging to the upper and middle classes are far more likely to believe that the rich and powerful get too much attention

from the news media than the poor. Here too, those from economically poorer backgrounds were very non-opinionated on the issue; around twice as much as the rich.

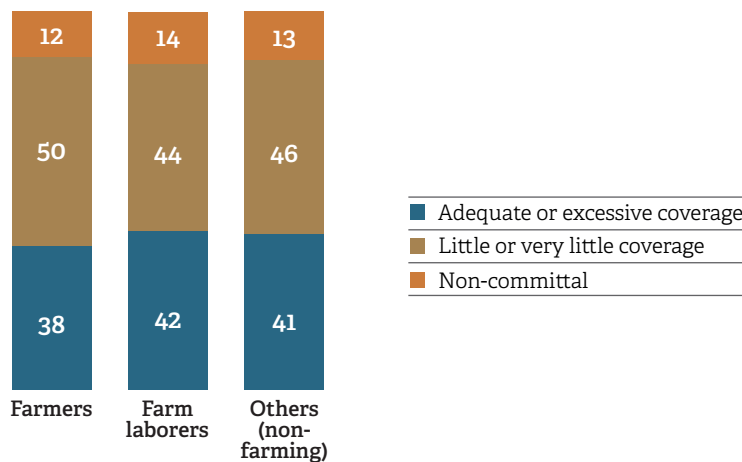
6.15: Perception about news media's coverage of Women's issues – by gender identity



6.15: The data highlights that men are as likely as women to believe that women's issues are not given adequate attention

by the news media. In fact men are slightly more likely to believe so (45%) compared to women (42%).

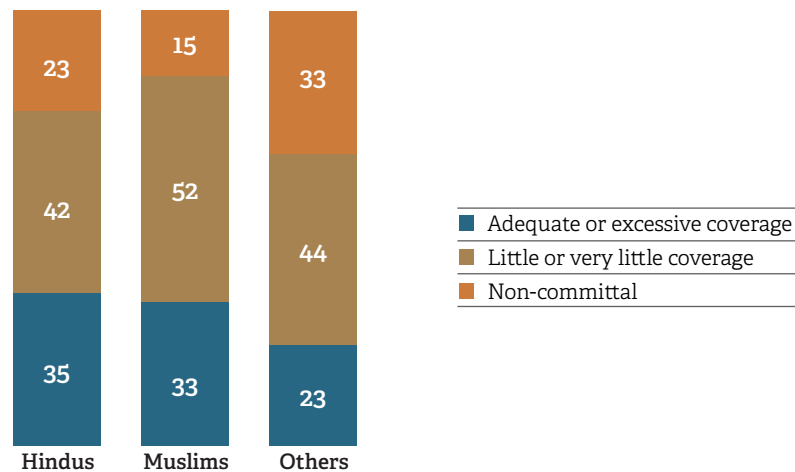
6.16: Perception about news media's coverage of Farmers' issues – by occupation



6.16: The years 2020 and 2021 saw farmers protesting against the three farm acts passed by the parliament in September 2020. We tried to gauge farmers' opinion on how issues related to them are covered in mainstream media. Half the farmers who consume news strongly feel that their issues have been neglected by the news media and

that their coverage is inadequate, or non-existent. They were more likely to feel so as compared to farm labourers (44%). Even among news consumers who had nothing to do with the farming occupation the perception that the media was ignoring farmers' issues was stronger than the perception that it was giving them adequate attention.

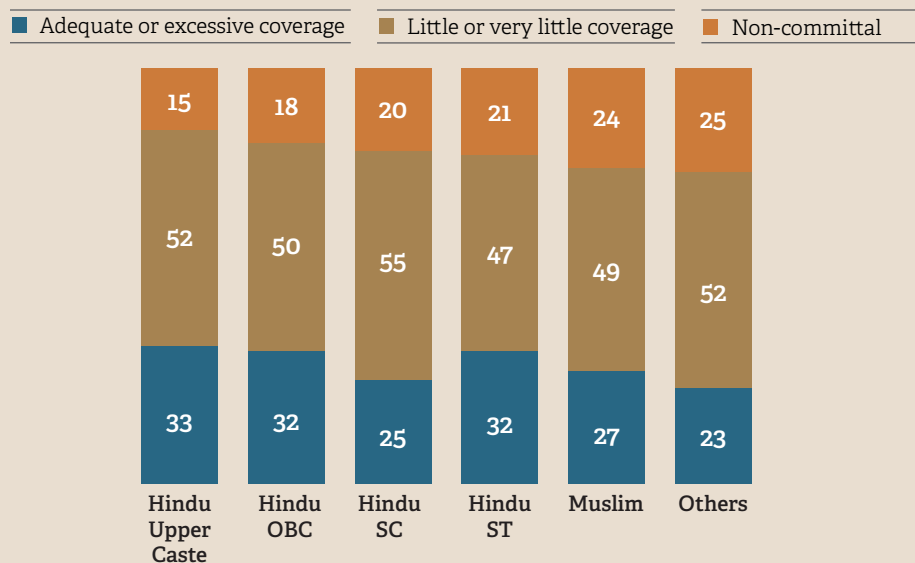
6.17: Perception about news media's coverage of issues of Muslims – by religious identity



6.17: Overall there is a unanimous consensus across all religious communities that the media ignores the issues and problems Muslims face. However, minority communities are a little more likely to believe so than Hindus. Though a sizable share of Muslims (33%) hold the opinion that

the media is giving a good amount of coverage to their issues, a much greater proportion (52%) feel that their issues are completely ignored by the media. This data needs to be read with caution as it is not clear whether the Muslims were thinking of negative or positive coverage when they answered the question.

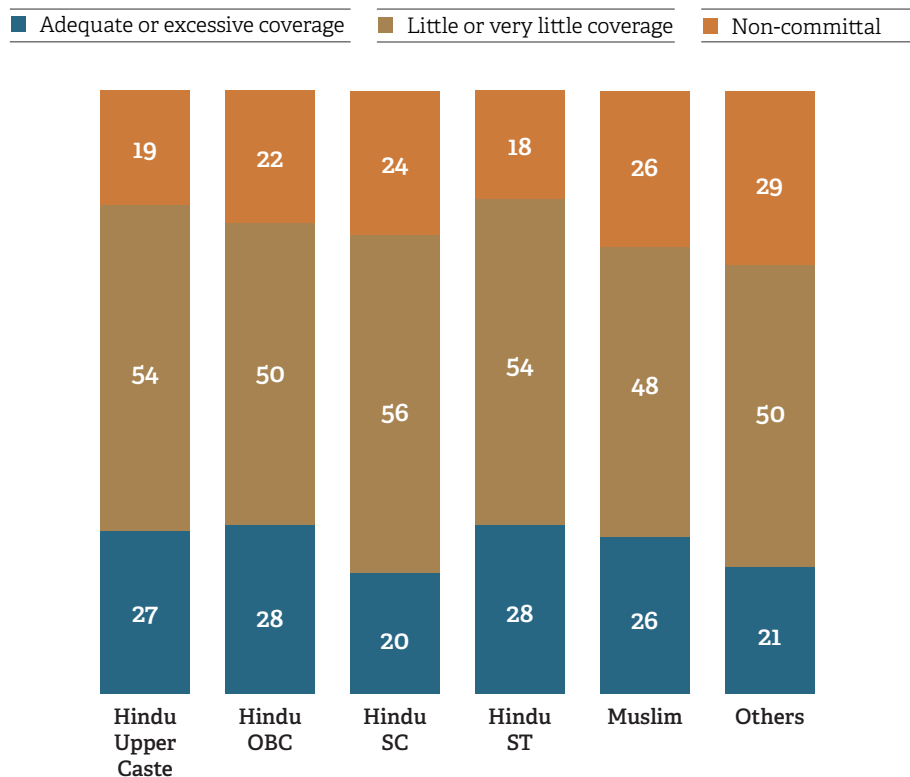
6.18: Perception about news media's coverage of issues of Dalits – by caste-community



6.18: On the question of coverage given to issues of Dalits by the news media, there is a consensus across caste communities that Dalit issues are being

ignored by the news media. Dalits, however, are more likely to think so than other communities. Adivasis were the least likely to hold this view.

6.19: Perception about news media's coverage of issues of Adivasis – by caste-community



6.19: As seen with respect to Dalit issues, there is a consensus among news consumers from all castes and communities that Adivasi issues and

concerns are not being given adequate coverage/attention by the news media. The perception is stronger among Dalits than Adivasis themselves.



MEDIA
CONSUMPTION
AND POLITICAL
CHOICES

INTRODUCTION

The relationship between the media and politics is the closest it has been in the country. Both exert influence on each other, primarily in two ways; politics determines the media's content; and the increase of media penetration is changing the way politics is done.

There is now an established trend towards either direct or covert control of media houses and news outlets by big corporations and political actors (governments, politicians etc.) who seek to shape public opinion by influencing the information and content that is being disseminated. Over the years, much has been written about this problem by scholars and members of the media. While some view it as the 'politicisation of the media', some others have used stronger terms, such as 'media capture'. It is now evident to media observers that the news being put out by many a news channel and newspaper these days tends to tilt towards certain parties and ideologies building a political narrative in their favour. There is also a growing tendency among people to label a news outlet as being pro one political party or another.

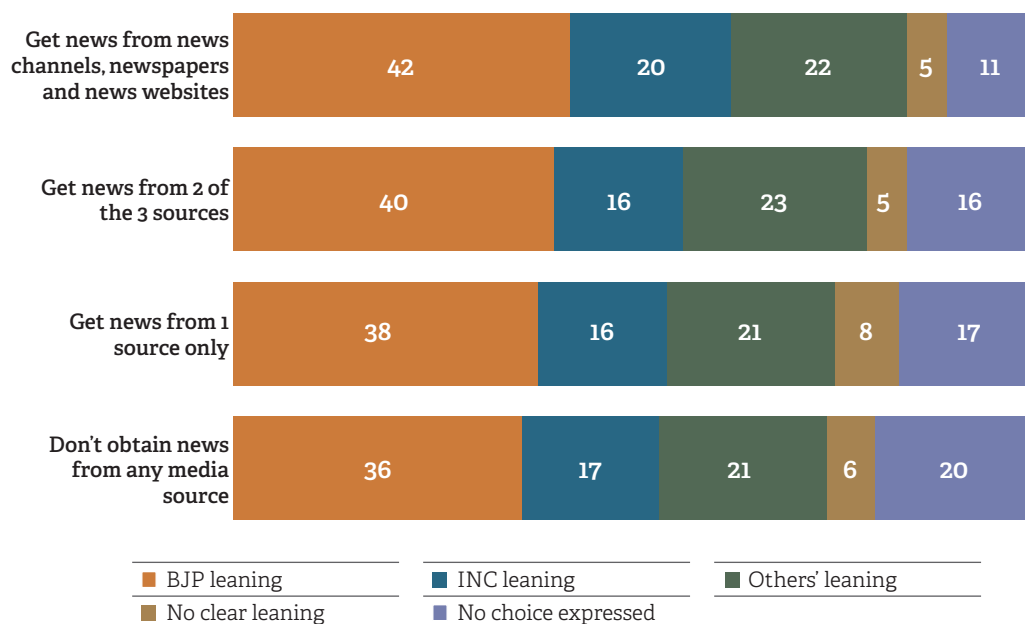
The media shapes discourse by shining light on certain issues, and shapes public perception of these issues by platforming certain opinions, making them a part of the mainstream. When political entities exert control over the media, they can choose who to platform, shaping the consensus around certain issues. Furthermore, they exert control over which issues are covered, shaping the public's perception of the very polity of the nation itself.

Another important feature of the relationship between media and politics is the trend towards mediated political communication and the application of media logic to the political realm. With advancements in technology, the growing penetration of and access to the internet, and the rise of social media and messaging platforms in the last 15 years, there is a realization among political parties that traditional forms of outreach such as pamphleteering, canvassing and holding large rallies is not sufficient to win people's backing. Messaging through the media, especially new media, is an equally, if not more, effective way to garner support. The BJP and its leaders were the first to realise this and all other major parties seem to have now caught up with it in this regard.

In the context of this trend towards a more politics-driven media as well as a more media-driven politics, it therefore becomes important to find out whether these dramatic changes are having any impact on people's political choices, and to what extent. Traditionally, election studies by Lokniti have shown that the BJP has done much better among those highly exposed to the media. Is that still the case or does the party now, in its current hegemonic phase, also do as well among those less exposed to the media? Moreover, do those who watch a certain news channel or read a certain newspaper tend to lean more towards a particular political party? The Media survey tried to look into some of these questions and this section reports those findings.

NEWS CONSUMPTION AND POLITICAL LEANING

7.1: At the aggregate level, support for BJP appears to be linked to news consumption



Note: Figures shown here and in the other charts in this section are percentages, unless specified otherwise. Party leaning is based on responses to questions about vote choice in the event of snap Lok Sabha and Vidhan Sabha elections. The survey was conducted in January 2022 and hence the ascribed leanings are for that immediate time period only.

7.1: At the aggregate level, we find a positive trend between media consumption, and support for the BJP. The higher is the news consumption of citizens, the greater is their support for the BJP. This is a clear pattern, seen only with respect to the BJP. However, the BJP also enjoys high support from those who don't consume news much, or don't follow it all. This indicates that media consumption is not a central or effective explanatory factor for party choice. As far as the Congress is concerned, while

there is no neat sequential pattern that is observed, the party, like the BJP, appears to be faring the best among those who consume news through multiple sources. Support for the other parties (all merged together) is more or less the same across all news consumption categories. Those who don't consume news were more likely to be ambivalent about their political choice in the survey. See Appendix to know about how political leaning was determined.

7.2: At the disaggregate level, however, no uniform effect of news media consumption is seen as far as preference for the BJP is concerned

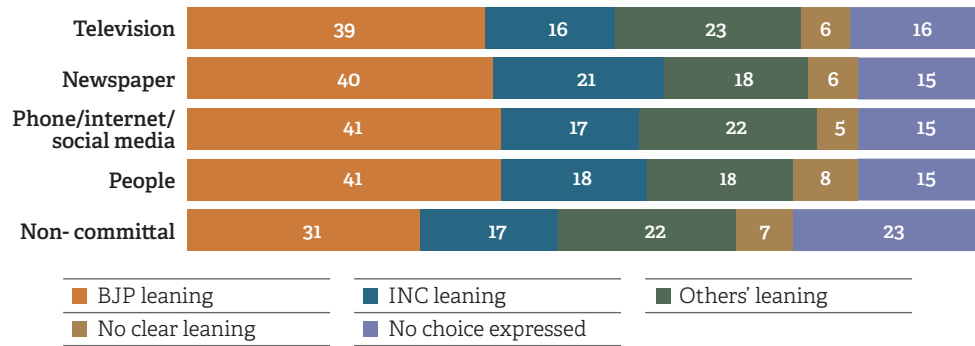
	BJP leaning	INC leaning	Others leaning
Hindu Upper Castes			
Get news from multiple sources	60	10	14
Get news from 2 of the 3 sources	57	10	14
Get news from 1 source only	47	10	14
Don't obtain news from any source	47	14	14
Hindu OBCs			
Get news from multiple sources	41	21	22
Get news from 2 of the 3 sources	47	15	23
Get news from 1 source only	50	12	17
Don't obtain news from any source	48	11	19
Hindu SCs			
Get news from multiple sources	37	25	23
Get news from 2 of the 3 sources	41	12	32
Get news from 1 source only	38	11	25
Don't obtain news from any source	41	10	24
Hindu STs			
Get news from multiple sources	43	28	15
Get news from 2 of the 3 sources	42	18	18
Get news from 1 source only	32	23	20
Don't obtain news from any source	23	30	17
Muslims			
Get news from multiple sources	17	32	35
Get news from 2 of the 3 sources	10	32	36
Get news from 1 source only	16	31	33
Don't obtain news from any source	14	33	30

Note: The rest either had no clear leaning or did not reveal their political choice

7.2: On disaggregating the news consumption and political leaning data on the basis of caste-communities, we notice that the support for the BJP rises with news consumption only among Hindu upper castes and Hindu STs (Adivasis), not among other communities. Thus, there is no uniform effect of exposure to the news media

across communities as far as preference for the BJP is concerned. In fact, among OBCs and SCs, news media consumption appears to be positively associated with support for the Congress. News media consumption's association with political preferences thus works differently among different communities.

7.3: Citizens' main source of obtaining news and their political leaning: no pattern noticed



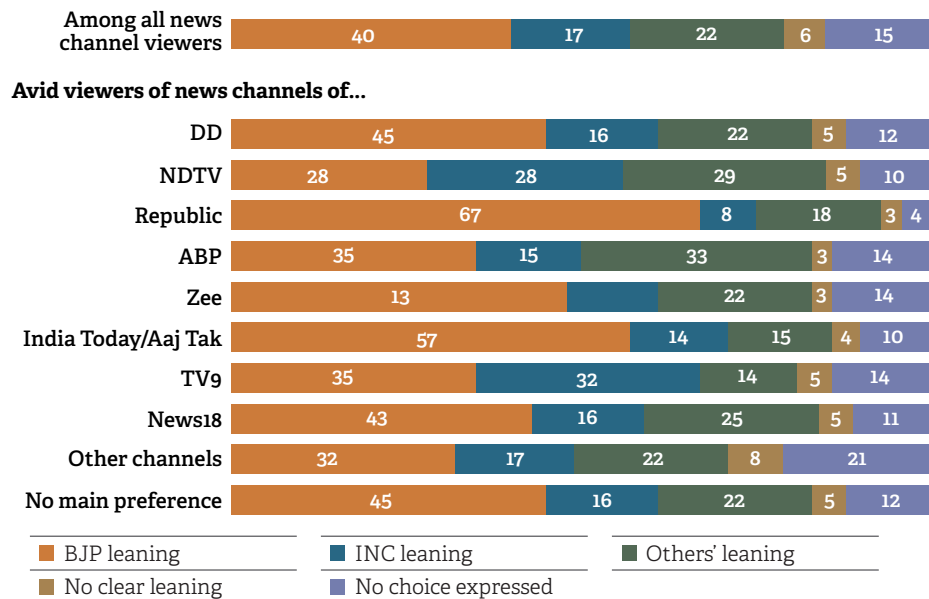
Note: *Radio not shown as sample size was too low. Only 1% said Radio was their main source for news

7.3: The BJP is as likely to draw support from those who obtain news from media sources as those who rely on people or word of mouth to get their news. Moreover, even among those who depend on media sources to access news, support for BJP remains flat, regardless of the media source. Those who mostly depend on smartphones and the internet for news are only

marginally more likely to support the BJP than those who mostly consume news through TV and newspapers. Once again, this shows that news media consumption or the kind of media that is being used to obtain news does not seem to be a key determinant of support for BJP or for that matter even the Congress. There seem to be other factors at play as well.

NEWS OUTLET PREFERENCES AND POLITICAL LEANING

7.4: Political leaning by news channel preference (channel watched 'most')



Note: Avid viewers of a particular news media group are those respondents who said they watch a news channel belonging to that media group the most. Times Group not shown in the table as sample size was too low.

7.4: Does the news channel/news media group that people consume indicate anything about their political leanings? The highest support for BJP can be seen among those who watch Republic TV the most (67%) followed by those who watch channels belonging to the India Today group (57%). BJP also gets higher than average support from those who watch news channels (in Hindi, English and regional language) of Zee, DD and

News18 the most. The Congress's support is mostly derived from avid viewers of news channels belonging to the TV9 and the NDTV groups. It does worst among avid viewers of Republic TV and Zee. Non-BJP and non-Congress parties seem to be doing best among ABP's, NDTV's and News18's viewers. This is most likely because two of these news media groups - ABP and News18 - have channels in several regional languages.

7.5: Political leaning of 'regular' viewers of different news channels/media groups

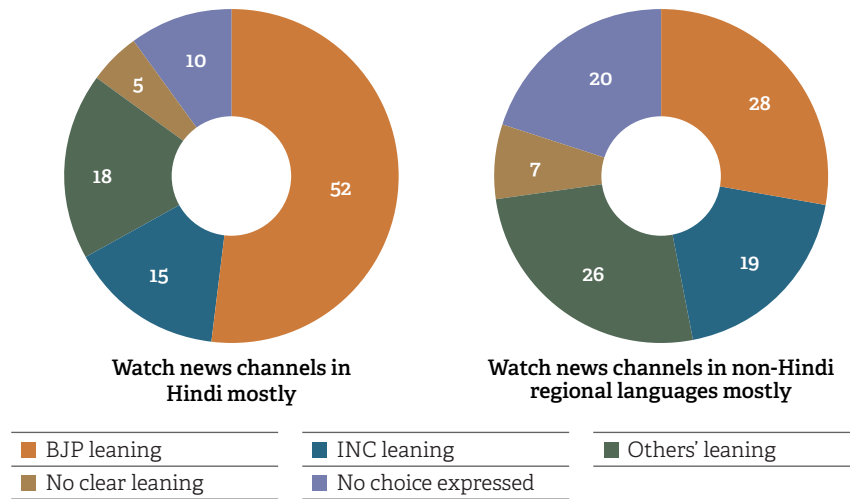
Regular viewers of news channels of...	BJP leaning	INC leaning	Others leaning	No clear leaning	No choice expressed
DD	45	18	25	5	7
NDTV	40	23	24	6	7
Republic	59	12	17	4	7
ABP	45	18	24	5	9
Zee	47	15	22	4	11
Times group	46	20	25	4	5
India Today group	53	16	19	4	8
TV9	42	22	20	5	11
News18	44	18	24	5	9

Note: Regular here refers to those who watch these channels daily or quite often

7.5: Even when we consider regular viewers of different news channels/news media groups (and not just those who watch them the most), the pattern remains the same with respect to the BJP and the Congress. Although the BJP leads among all types of channel viewers, Republic, India Today and Zee's

regular viewers are far more likely to support them than regular viewers of other media groups. The Congress does best among regular viewers of NDTV and TV9 news networks. The support for regional parties is more or less spread evenly among regular viewers of all channels.

7.6: Not surprisingly, the BJP does best among viewers of Hindi news channels

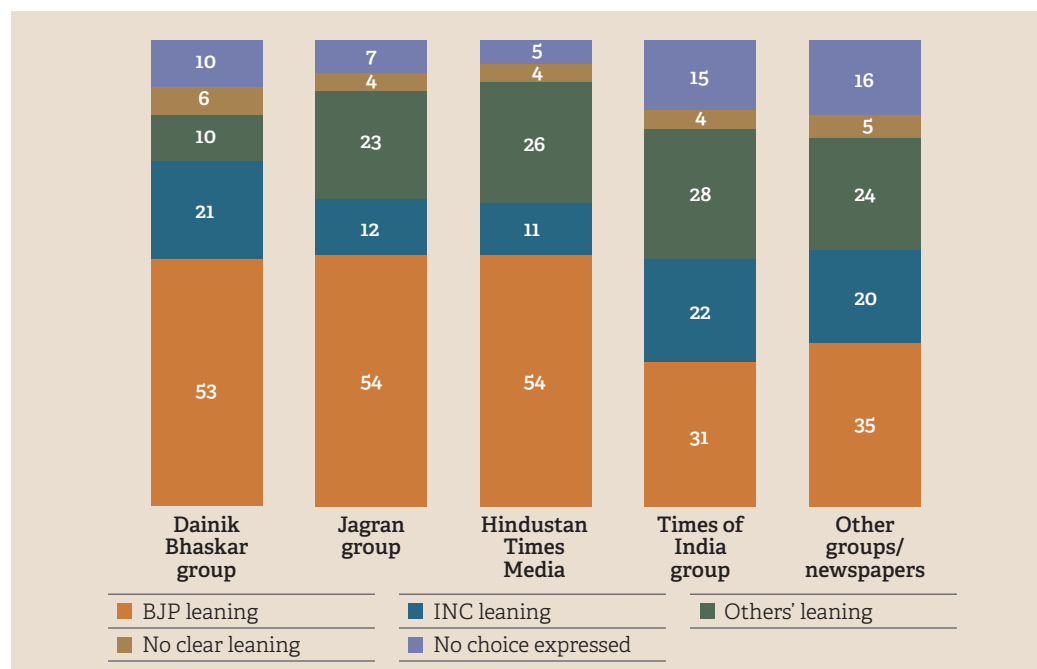


Note: Since the sample size of those who watch news channels in English the most is too low, their preferences haven't been shown.

7.6: The BJP derives most of its power from the Hindi heartland, which is why it makes sense that the party enjoys strong support amongst the viewers of Hindi-medium news. Somewhat paradoxically however, it also enjoys more support than the Congress among non-Hindi news channel viewers,

although its lead here is not as huge. This is largely on account of its popularity in linguistic states such as Assam, Gujarat, Maharashtra and Karnataka. More than the type of news channel that is being watched, it is the regional location of the respondent that is the driving factor behind their political choice.

7.7: Readers of newspapers belonging to Jagran, Hindustan Times and Dainik Bhaskar tilt heavily towards the BJP

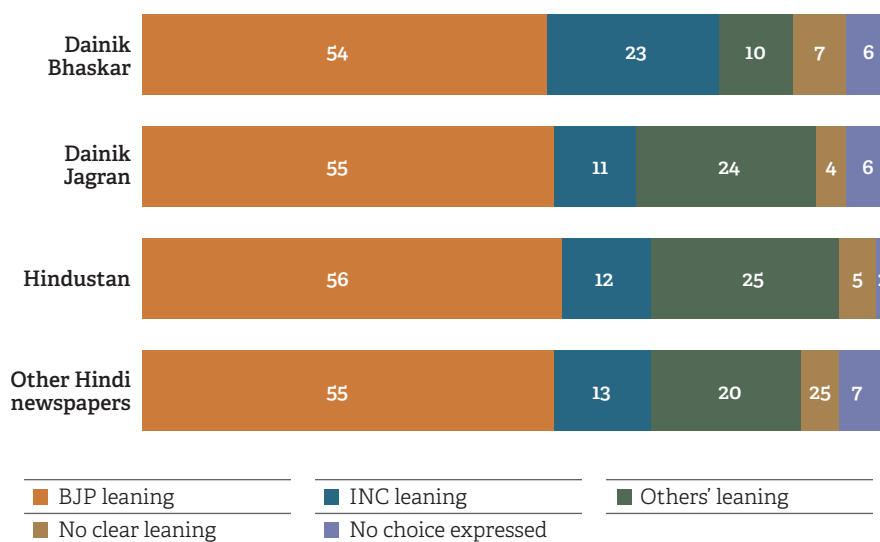


7.7: Readers of newspapers belonging to Dainik Bhaskar, Jagran and Hindustan Times groups appear to be strongly BJP leaning. This is perhaps because these newspaper groups publish mostly in Hindi and in the non-Hindi States where the BJP has a strong presence. The BJP doesn't do as well among readers of newspapers belonging to the Times of India group,

which is mostly published in English and has a national spread beyond the Hindi heartland. While three-fifths of newspaper readers read newspapers that don't belong to these four newspaper groups, we are not in a position to share their political leaning separately due to inadequate sample sizes. This is because the core readership of each of these papers is 3% or less.

7.8: Readers of Dainik Bhaskar, Dainik Jagran and Hindustan in Hindi-speaking states are not unique in their high support for BJP

Newspapers read most in Hindi-speaking States

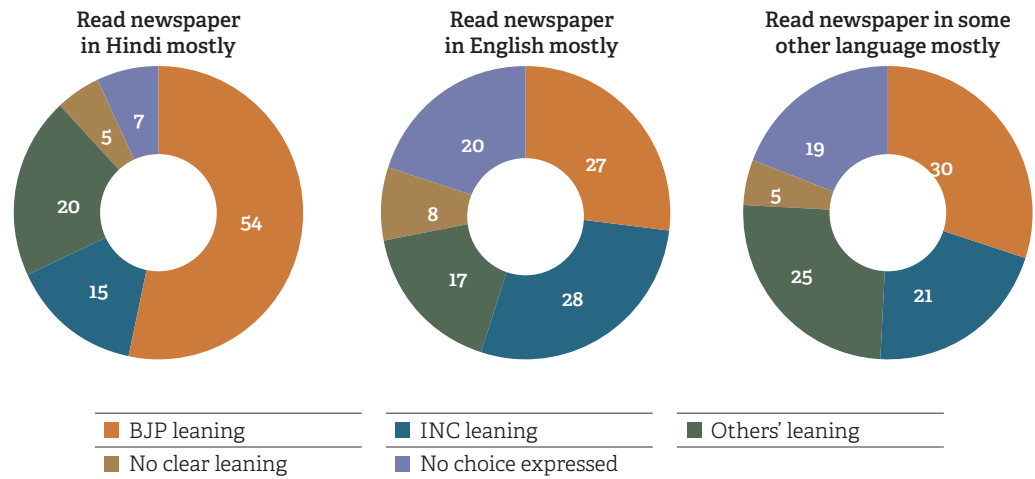


Note: Since the sample size of those who read TOI newspapers in Hindi states is too low, their preferences have not been shown above separately; Hindi states in the survey are Haryana, Delhi, Rajasthan, Uttar Pradesh, Madhya Pradesh, Chhattisgarh, Jharkhand and Bihar.

7.8: It is difficult to say if there is something unique about the support the BJP enjoys among the readers of Bhaskar, Jagran and Hindustan. This is because in Hindi-speaking states

those who read other Hindi newspapers are also likely to support the BJP in the same measure as those who read Dainik Jagran, Dainik Bhaskar and Hindustan. There is no major difference noticed.

7.9: Among the few who read English newspapers, Congress had an edge over BJP in the survey

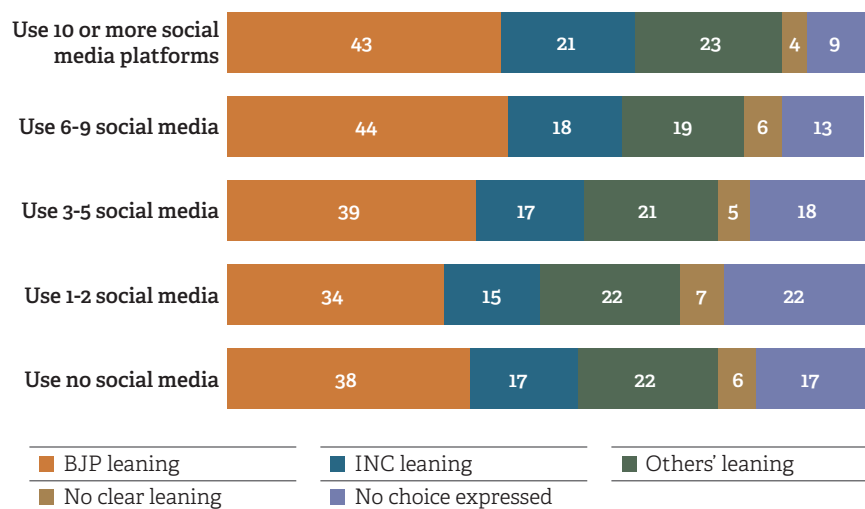


7.9: The proportion of individuals that mostly read the newspaper in English is around 3% only. However, among this tiny segment the Congress enjoys the most support. English newspaper readers were a tad more likely to support the Congress than the BJP. This is not the case among readers who read newspapers in other languages. Once again, due to its political

dominance in the Hindi-speaking states the BJP does best among Hindi language newspaper readers and worse among readers of newspapers in non-Hindi regional languages. However, among the latter too it enjoys a lead over the Congress and other parties, largely because of its popularity in linguistic states such as Assam, Gujarat, Maharashtra and Karnataka.

SOCIAL MEDIA USAGE AND POLITICAL LEANING

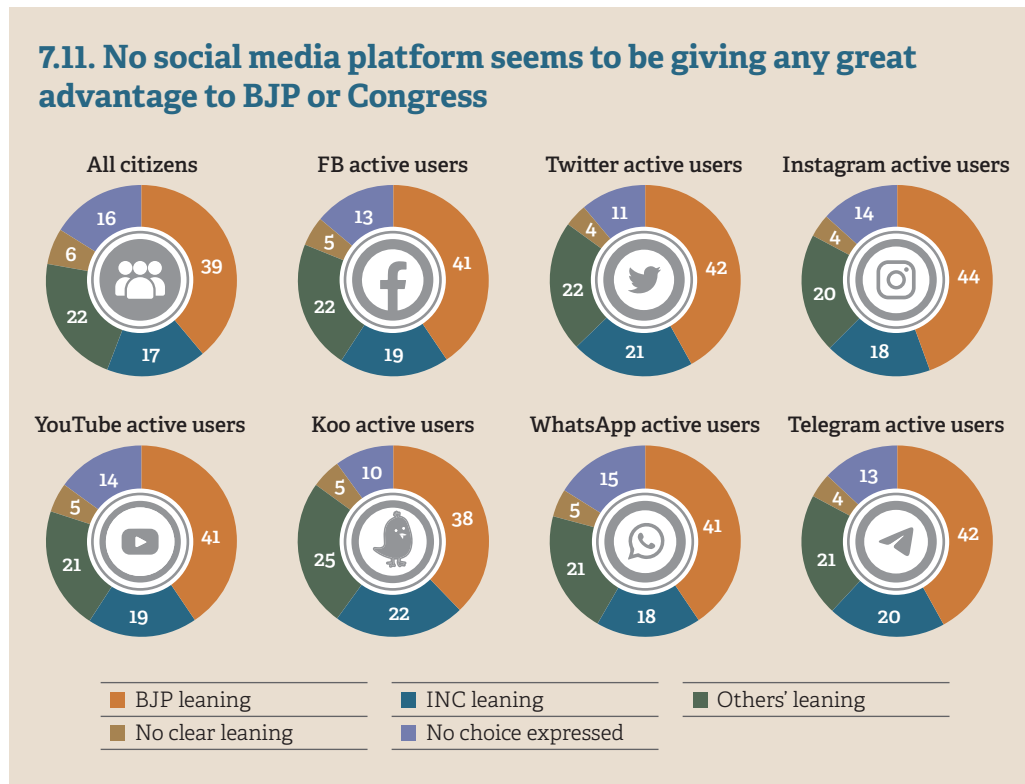
7.10: Both BJP and Congress do better among those using many social media platforms



7.10: There seems to be no clear link between the number of social media platforms people use and support for the BJP. Those who use many platforms are more likely to support the BJP. But the same is true for the Congress as well.

Moreover, those who don't use social media at all are more likely to support the BJP and the Congress than those who use 1-2 social media platforms. Hence, the trend is not neatly linear.

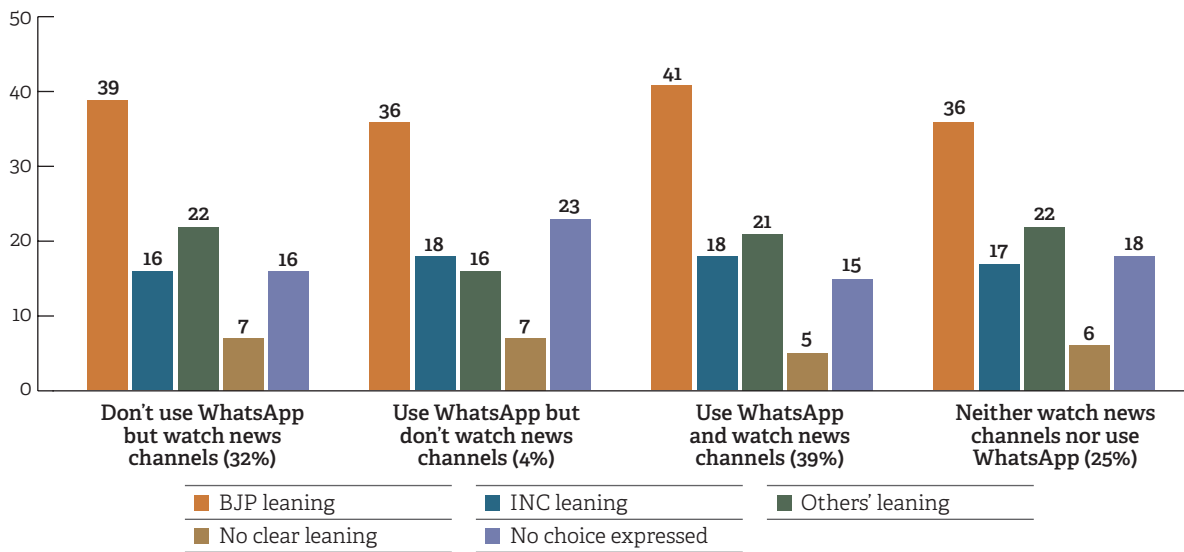
7.11. No social media platform seems to be giving any great advantage to BJP or Congress



7.11: There is no major difference noticed between the political preferences of the average Indian citizen and those that actively use social media. The BJP's advantage among active social media users is minor. Two-fifths of active users of almost all social media platforms support the BJP. The Congress only gets about a-fifth of their support. Instagram's active users demonstrate the

most support for BJP and, surprisingly, its lowest support is seen among Koo's active users. The Congress appears to be doing much better than average among Koo, Twitter and Telegram's active users. However, considering that many users are using several platforms at the same time it is difficult to tell which platform is driving BJP's or Congress's support.

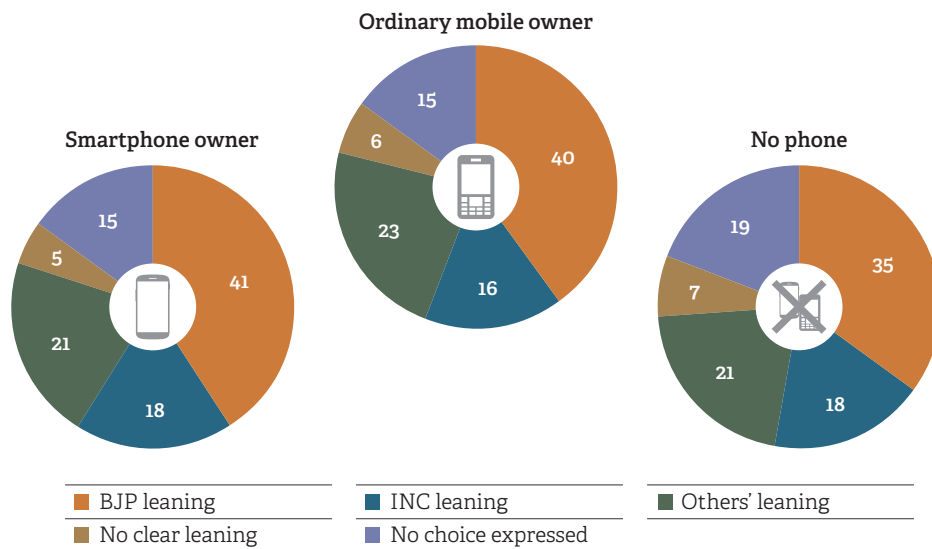
7.12: WhatsApp or news channels: which one of the two is driving more support for BJP?



7.12: Contrary to popular wisdom, WhatsApp is not really the digital platform that is boosting BJP's support. This is because the survey found that those who don't use WhatsApp at all

and watch only news channels are more likely to support the BJP than those who use only WhatsApp and watch no news channels.

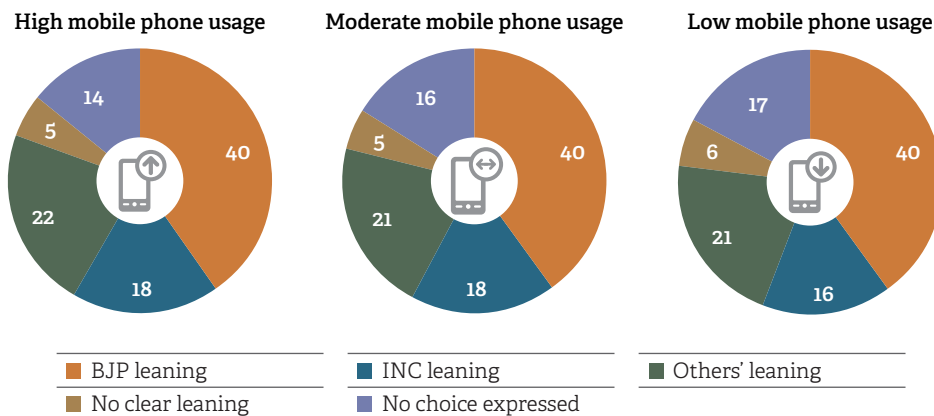
7.13: Mobile phone ownership does seem to associated with support for BJP but this could be a function of class



7.13: Those having a mobile phone show greater support to the BJP. But this is probably a function of class. The BJP has always done better among economically

well off citizens, the same group of people that are more likely to have a mobile phone or a smartphone.

7.14: Intensity of mobile phone usage makes hardly any difference to the BJP's support

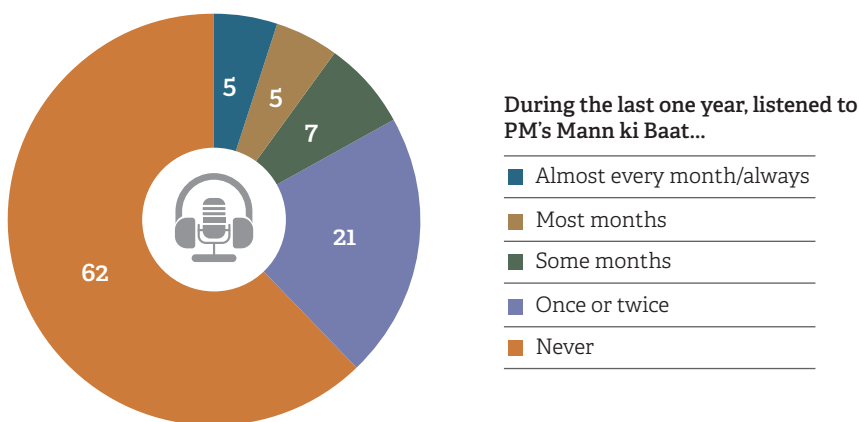


7.14: There's no direct correlation between mobile phone usage and support for the BJP. Be it high, moderate

or low mobile phone usage, the BJP gets an equal amount of support from all three categories.

PM'S MANN KI BAAT: A REALITY CHECK

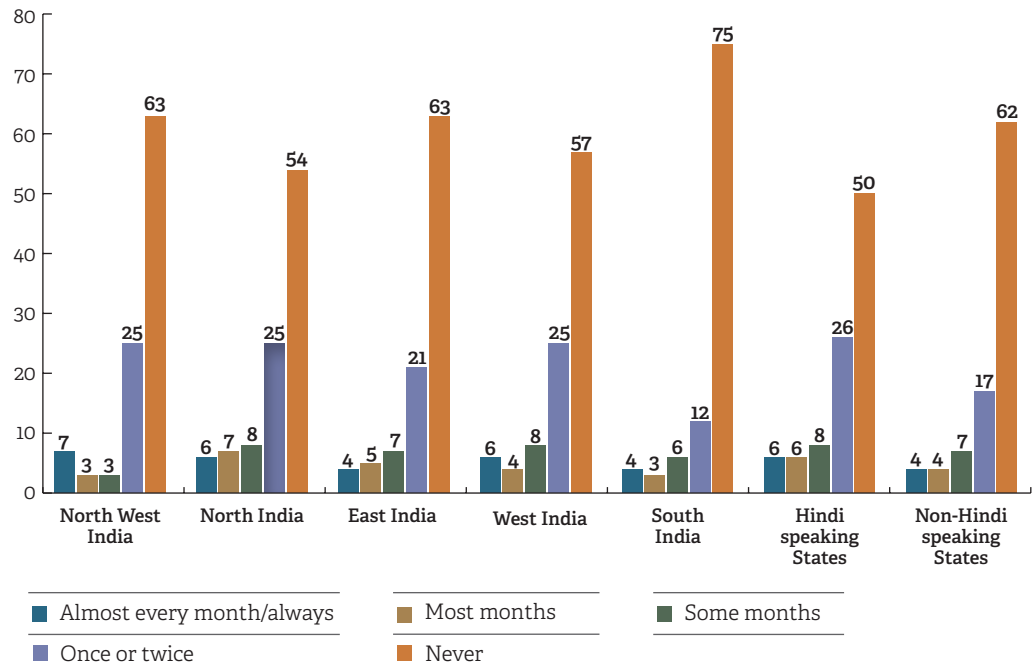
7.15: Very low listenership of PM's Mann ki Baat



7.15: Ever since he became the Prime Minister in 2014, Narendra Modi has addressed the nation at least once a month, through his radio address programme called Mann ki Baat. The main stated objective of the programme is to have a dialogue with the citizens on issues of day-to-day governance. The PM's address is aired live not just on All India Radio and DD, but also by many private radio and TV channels. It is also available on YouTube. However,

the media survey suggests that the listenership of the programme is very low. When respondents were asked about how often they had listened to the programme on radio, TV or internet "during the last one year" (i.e., 2021, the year preceding the survey), only one in ten said that they had listened to it quite regularly (5% every month and 5% most months). Three-fifths of the citizens said that they had not listened to it at all.

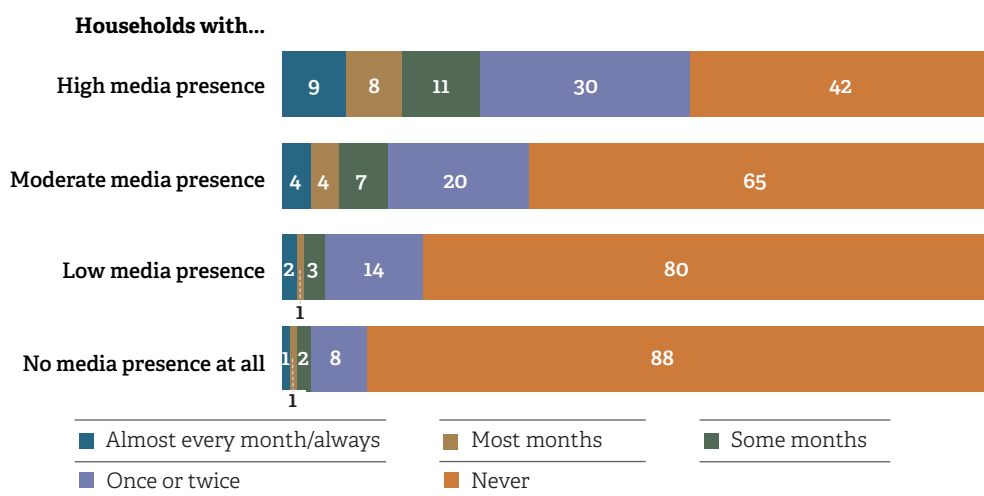
7.16: Majority across all regions don't seem to be listening to PM's Mann ki Baat at all



7.16: Across all regions the majority haven't listened to the PM's Mann ki Baat Programme at all in the last year. Across the nation, South Indians are the least likely to have listened to the programme,

most probably due to the fact that the PM's address is in Hindi. That being said, even in the Hindi-speaking States, popularity/listenership of PMMKB is rather low.

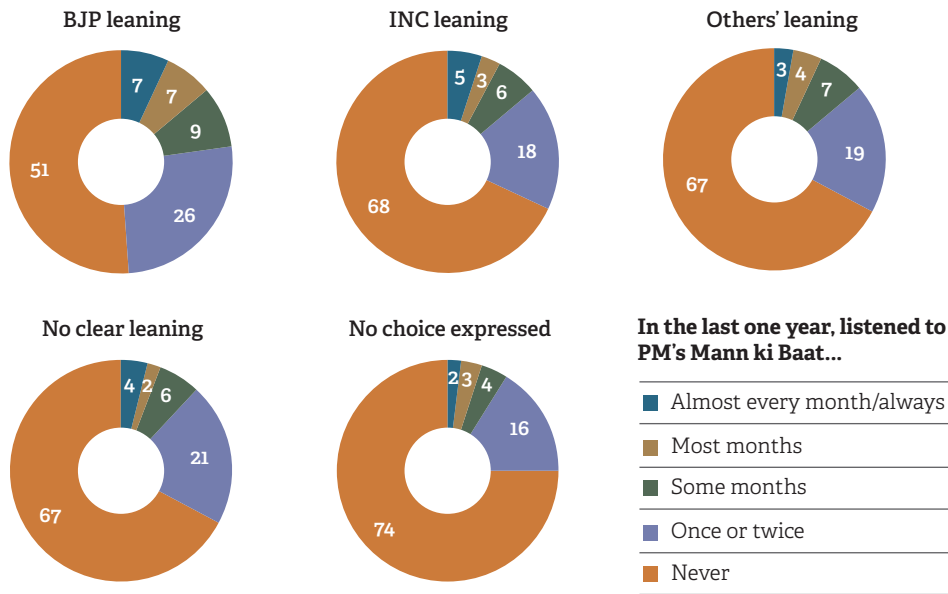
7.17: Citizens from households with high media presence also don't listen to PMMKB all that regularly, although they are more likely to be regular than others



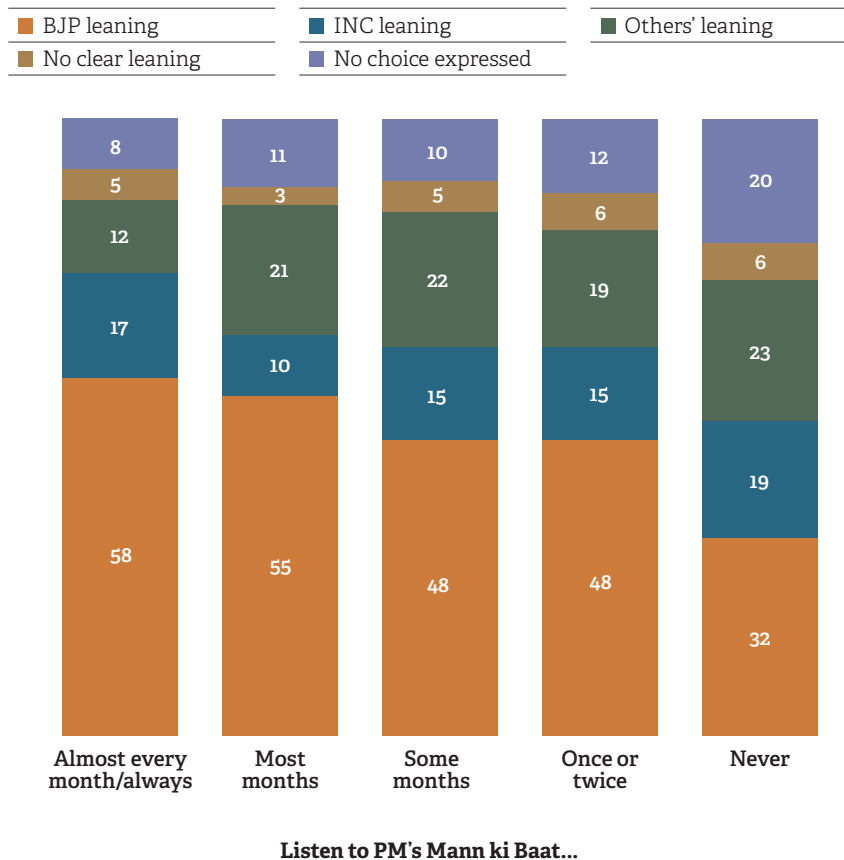
7.17: Even in households that have a high media presence (TV, internet, stereo, etc.), two-fifths had not heard Mann ki Baat in

the last one year and three in every ten had only heard it once or twice.

7.18: Over half of those leaning towards BJP don't seem to be listening to PM Mann ki Baat



7.19: Not surprisingly, among the few who listen to PMMKB regularly, the BJP gets very high support



CONCLUSIONS

CONCLUSIONS

From the several findings of the Media Survey shared in this report, some broad conclusions can be drawn.

Mobile dominance: First and foremost, the survey highlights the growing importance of a mobile phone in the life of an average Indian. Around seven out of every ten citizens in the country today own a mobile phone and of them nearly two-thirds are smartphone owners. This means that more people in India today own a smartphone than an ordinary mobile phone which was not the case till about three years ago when a national survey by Lokniti had found more citizens to be using basic and feature phones than smartphones.

This dramatic shift in the type of mobile phone being used in such a short span of time is most likely to have happened on account of the pandemic and the lockdowns that came in its wake that forced people to move their activities and education online. In fact, the survey also found that those who use internet in India (two-thirds use the internet and two-fifths use it actively) are mostly using it on their mobile phone through a data plan. Very few households (only one in ten) also access the internet through a reliable broadband connection at home. This finding also assumes significance in the context of frequent internet shutdowns in the country that usually involve the suspension of only mobile internet services and not fixed-line services (dial-up, wired/wireless broadband).

In comparison to mobile phone (and smartphone) ownership, computer/

laptop/tablet ownership is very low in the country. Only one of every five households has a computer or laptop or tablet at home. The higher cost of desktop computers, laptops and tablets, and the fact that smartphones essentially work as mini-computers and perform many of the same functions as computers do might explain the low penetration of computer/laptops/tablets. The low ownership of computers also indicates that much of the online education that took place during the pandemic happened on smartphones and not on the larger screens of computers. Also, not only is ownership of computers by households low, computer usage by Indians is also abysmally low. In the survey only one in five citizens reported having ever used a computer/laptop/tablet. Digital literacy in the country thus appears to be largely limited to mobile phone/smartphone literacy at present.

The increasing importance of the mobile phone in India can also be gauged from the fact that more Indian households today have a mobile phone at home (i.e., with at least one mobile phone-owning member) than they have a television set, which is a reversal of the trend that existed a decade ago. Furthermore, the survey found hardly any difference between the times spent on the two devices. On average, mobile phone users in India today spend about three hours on their phone daily, which is about the same as the time spent by daily TV viewers watching TV everyday. Among smartphone users specifically, the average time being spent on the smartphone daily is over four hours. One-third of mobile phone owners said

they would feel extremely restless if their mobile phone was taken away from them for a day as opposed to a quarter of daily TV watchers who said the same for TV.

Digital divide persists but less sharp:

Although there is no doubt that access to mobile phones and the internet among people has increased in a major way over the last few years, the digital divide (i.e., the gap between demographics and regions that have access to modern information and communications technology and that don't) still exists, even though it is less sharp now than earlier. The usage of digital devices such as mobile phones, smartphones, and computers/laptops/tablets is comparatively still much less among the elderly, the economically poor, non-literate and rural citizens than it is among the young, economically well-off, educated and urban citizens. It is also far lower among women compared to men. For instance, even though women now, unlike earlier, are more likely to have a mobile phone than not have one, they are still far behind men in their access to a mobile phone. What's more, even as there is hardly any difference between women and men as far as ownership of an ordinary mobile phone is concerned, there remains a huge difference among the two genders with respect to smartphone ownership. Since internet access/usage in India happens mostly through smartphones, the smartphone ownership divide between men and women also means that fewer women than men are accessing/using the internet.

As far as castes and communities are concerned, Scheduled Tribe citizens and households are least likely to use or own digital devices or have access to internet. The use of and access to digital technologies among Scheduled

Caste citizens and households isn't too high either. Hindu upper castes on the other hand are the most likely to use or own them. This skew is mostly due to economic class and education. Considering that digital devices, especially smartphones, are nowadays necessary for online education or to get the benefit of various government schemes and services, these divides with respect to ownership and usage of digital devices are significant.

South India high on media

consumption: A digital divide also exists along regional lines. Households in North West India, South India and West India are far more likely to use digital devices than households in Eastern and Northern parts of the country. This is most probably on account of relatively higher incomes and perhaps greater literacy more than anything else. Going beyond just the digital, if we look at media usage as a whole, then South India emerges far ahead of the rest of the regions. Citizens in the southern states of the country were found to be watching television, reading the newspapers, listening to the radio and using social media far more than citizens in other parts of the country. This higher media usage in South India compared to other regions was a consistent pattern noticed across many other media-related questions as well.

Internet usage is mostly about social

media usage: The most common and popular activity on the internet is the usage of social media and messaging services. The survey found that nine out of ten active internet users use social media and messaging platforms (at least one of them), which is far greater than any other activity that internet users are engaging in on the internet. While search engines are being used by three-

fourths of active internet users, news and current affairs website browsing is being done by around seven out of ten of them. Significantly, the usage of e-mails which was quite a common activity among internet users until social media and messaging platforms arrived is only being done by about two-thirds of active internet users and that too quite irregularly.

Facebook dominance fades, YouTube the rising star:

The most used social media and messaging platforms by Indians currently are WhatsApp and YouTube, both of which have seen steady growth during the last three years, YouTube particularly. WhatsApp usage has increased by seven percentage points in the last three years and YouTube usage has gone up by 11 points. Facebook, which was once the most dominant social media platform has slipped to the third position according to the survey. Many of Facebook's users seem to have shifted to using Instagram, which the survey found to be the fourth most used social media platform in India. Instagram use has nearly doubled in the last three to four years while Facebook's has stagnated. Quite surprisingly, the usage of Twitter, the micro blogging service which is always in the news because of its high usage by celebrities and politicians, continues to lag behind quite a bit. The survey not only found it to be less popular than Telegram (a messaging platform that was launched much after Twitter), but also found it to be used more infrequently by its users than frequently. That being said, the platform's growth which had appeared to have stagnated in India in 2019 (as per Lokniti's National Election Study during the Lok Sabha elections) has increased quite a bit in the last three years.

Government surveillance

acknowledged but not considered

immoral by many: Most smartphone and internet users were found to hold the belief that the government monitors what people do on the internet or their phone, i.e., they acknowledged that it takes place. However this acknowledgment does not mean that they disapprove of government surveillance. This is because when the same people were asked to give their opinion about the morality/ethicality of government surveillance, a sizeable proportion of them saw nothing wrong with it. For instance, social media users who believe that the government monitors people's internet and phone activities were more likely to consider government surveillance of social media activities to be "nothing wrong" than those who believe that the government doesn't monitor these activities.

This same pattern could be seen with respect to mobile phone users' opinion regarding the ethicality of government monitoring people's phone conversations. Those who believed that the government surveils people's phone conversations were less likely to consider it wrong than those who believe it doesn't. In other words, people's belief that government surveillance takes place shouldn't be misconstrued as disapproval of it. Even as there is an acknowledgement that surveillance takes place, it is not necessarily seen as a bad thing. That being said, on the whole people were more likely to disapprove of phone conversation surveillance than social media surveillance. They did make a clear distinction between the two. While most disapproved of the former, as far as the latter is concerned, there was greater approval of it than disapproval. In fact, the belief that government

surveillance of phone conversations is wrong or unethical existed across socio-demographics and regions and irrespective of whether people had a phone or not.

Social media used a lot by internet users but least trusted: Even though most internet users are mostly engaged in using social media and messaging platforms on the internet more than any other internet service, nonetheless they do not trust the information that they receive on social media platforms very much. Very few active social media users were found to have high trust in the information or news that they receive on social media. Most have moderate to low trust. While Twitter and WhatsApp are the most highly trusted of all platforms, even with respect to them only a sixth of their users highly trust them to disseminate/carry correct news or information. Around half of all social media users were found to be highly or moderately concerned about receiving fake news or information on social media or messenger apps, and nearly half of all social media users admitted to having been misled by fake news or information online at some point. The survey also found social media companies to be far less trusted than other internet services such as search engines or government websites when it came to the issue of ensuring the secrecy and confidentiality of personal data and activities.

Harassment on social media:

Harassment and trolling on social media is something that quite a few social media users have experienced. Around one-third of active Facebook, WhatsApp and Twitter users reported being threatened, harassed or trolled by known or unknown people after sharing content on these platforms

during the last one year. This harassment may be resulting in self-censorship or a spiral of silence on social media. That's because the survey also found that around two in every five social media users have in the last year either stopped themselves from expressing their political opinions, or at least thought twice about doing so, because they feared being misunderstood, seen in a bad light by people they know or being harassed by strangers.

The survey found that not many social media users in India are posting or expressing their thoughts and opinions on issues. They are in fact far more likely to post photographs, particularly selfies, on their social media platforms than post opinions. As far as posting of political opinions is concerned, a very large proportion of social media users (even WhatsApp and Facebook users) said that they do not do so. This could either be because they are simply not interested in politics and public matters or because they are refraining themselves from doing so. In fact, opinion on the issue of whether social media and WhatsApp are safe places to express one's opinion on politics was found to be badly divided.

It was also found that most users of messenger platforms like WhatsApp and Telegram are not part of any political group or channel. Only one in every six messenger app users reported being part of a political group on the messenger app/s that they use.

A guarded and perhaps illiberal outlook regarding freedom of expression on social media:

Most of the survey respondents were found to carry what could be considered as conservative or illiberal opinions on the issue of free speech and expression

on social media. For instance, a greater proportion of social media users expressed their opposition to than support for the proposition that “even if an idea or opinion is seen as offensive, there is nothing wrong if people express it on social media or WhatsApp”. They were also more against the posting of supposedly ‘offensive’ and ‘objectionable’ opinions about the government on social media and messaging platforms than in favour of it. However on this matter (that of posting an ‘objectionable’ opinion about the government), their opposition was relatively less strong when compared with their opposition to posting opinions of an ‘offensive’ nature on social media more generally. Support for internet shutdowns by governments on law and order grounds was also greater than opposition to it. The only issue, perhaps, on which a not so conservative opinion was seen, was that of government regulation of social media content. Social media users were far more likely to be against than in favour of the idea of the government determining what can or cannot be posted on social media or WhatsApp.

TV still the main news source: Despite it being the age of the internet, for most Indians, the traditional medium of television continues to be the main go to source for news. In the survey, people were twice as likely to cite TV as their main source of news as they were to cite new media, i.e., internet/mobile phones/social media. This is not to say that internet has not emerged as a major means of obtaining news. It certainly has, especially among the young and the highly educated as per the survey. However, it appears that it still has a lot of catching up to do before it overtakes the old media sources. Within the traditional media landscape, it is television that is far

more dominant as the primary news source than newspapers – nearly seven times more dominant. Moreover, most Indians seem to prefer to watch news channels (on TV or elsewhere) rather than read newspapers. While there is nothing new in this and news channels have always been more popular than newspapers, the gap between the two mediums seems to have widened further and this is largely more due to a decline in newspaper reading rather than in news channel watching. Newspapers, however, fare better than online news websites. While half of all respondents reported reading a newspaper, two-fifths said that they visit/browse news and current affairs websites.

Content being consumed in local language:

Much of the news and entertainment that people are consuming seems to be in their local language. While in the northern and central parts of the country, most people are accessing/consuming news and entertainment (films, TV dramas etc.) in Hindi, in other parts of the country it is the non-Hindi regional languages that mostly dominate. Having said that, there were quite a few respondents (25-35%) in the non-Hindi speaking states of Gujarat, Maharashtra, Assam and Punjab who did report consuming news and entertainment mostly in Hindi and not the local language. Significantly, a very miniscule proportion of Indians consume news and entertainment in English and in this context the importance given to English language media, particularly English news media, by media watchers seems rather disproportionate. Hindi and regional language media/content seem to have a far greater sway over public opinion and public taste than English language media.

News preferences: Most news consumers seem to prefer watching or reading local news (state or district news) rather than national news. Moreover, following what's happening outside the country (international news) seems to be the least of their priorities. There also seems to be a yearning among news consumers to return to the old way of delivering news. In spite of the fact that news channels are increasingly choosing to have more for debate-oriented shows than traditional style news bulletins, most news consumers in the survey preferred the latter than the former when given a choice between the two.

Little trust in private news channels:

The findings related to people's trust in news media present a mixed picture as consumers of news seem to be making a clear distinction between different types of news sources when it comes to trusting them. While the public broadcaster Doordarshan and newspapers (generally speaking) were found to enjoy a high amount of trust from their consumers (one-third of their consumers said they highly trust them); private news channels did not fare as well with only one in every seven of their viewers reporting high faith in the news being disseminated by them. All India Radio news and online news websites did even worse than private news channels.

The survey also found a clear difference of opinion on the issue between Hindus and Muslims. Whatever be the news source, Muslim news consumers were found to be less trusting of it than Hindu ones. This is significant but not surprising given that the news media has often in recent times been accused of targeting and vilifying the Muslim community in its coverage. A clear partisan divide on the issue of trust

was also noticed. Those leaning towards the Congress and regional parties were found to have less faith in all types of news media compared to those leaning towards the BJP. The religious and partisan divide could also be noticed on the question of media freedom. Hindus and BJP supporters were far more likely to view the Indian news media to be functioning freely than citizens belonging to the minority communities and supporters of Congress and other non-BJP parties.

Significantly, the only questions on which some sort of unanimity could be seen were the ones to do with news media's political bias. Be it Hindus or Muslims, BJP-leaning citizens or citizens leaning towards other parties, all of them were more likely to perceive the news media's portrayal of the Modi government to be too favorable than it to be too unfavorable. They were also more likely than not to believe that the media portrays the opposition parties too negatively.

The survey also found a strong perception among news consumers that the news media in India does not give adequate attention to the issues and problems of poor and marginalized communities. Instead it is seen as catering excessively to the issues and concerns of the rich and big people. In other words, the Indian media is perceived as having a pro-rich/pro-business bias.

Media exposure and political preferences:

Going by the survey findings it appears that the BJP continues to have a media advantage. Citizens who consume more news and use more social media are more likely to lean towards the BJP than citizens who read/watch less news or use less social media. However, there are two

reasons why we should be cautious about exaggerating this aspect. First, this trend of greater support for the BJP among the highly media exposed can be seen only at the broad aggregate level and not when the findings are disaggregated by important socio-demographics. For instance, the connection between exposure to news media and support for the BJP works differently among different castes and communities. While the two appear to be positively associated among upper castes and Adivasis, no such positive relationship can be seen among other communities such as OBCs, Dalits and Muslims. Among OBCs and Dalits, in fact, it is the Congress that seems to be benefitting from higher media exposure. Second, in its current hegemonic phase when the BJP has made deep inroads beyond its core upper caste base, we find that the party does only slightly, and not hugely, worse among those who are very poorly exposed or not exposed to the media at all. What's more, the

BJP leads its political competition even among this isolated/disconnected segment. This is something that didn't happen earlier but is happening now.

As far as specific media preferences and their impact on political choices is concerned, it is difficult to say on the basis of the survey whether what people are watching or reading or consuming is influencing their political leaning or not. Nonetheless some interesting patterns did emerge from the survey and bear mention. Viewers of Republic TV, a channel which is arguably more right-wing in its coverage than any other news network in India currently, were found to be far more likely to support the BJP than any other party. They were also least likely to support the Congress. On the other hand, viewers of NDTV, which is perceived by some as being anti-BJP, were found to be least likely to support the BJP compared to viewers of other channels.

APPENDICES

Appendix I: How the Indices were constructed

Five indices have been used in this report. Here are the details of how they were constructed.

INDEX OF MEDIA PRESENCE AT THE HOUSEHOLD LEVEL (used in Sections 1 and 7)

The index was constructed by taking into account 11 questions asked in the survey. They are:

- Q3b. Please tell me, do you or any of your household members own a computer or laptop or tablet?
- B11a. How many people in your household own a mobile phone?
- B11b. (If gave a number in B11a) How many of them have a smartphone?
- Q1. Do you have a mobile phone of your own that is always or mostly used by only you?
- Q1a. (If 'Yes' in Q1) What kind of a mobile phone is it – an ordinary phone where you have to press buttons to call someone or a smartphone where you have to touch the glass screen to make a call?
- Q2i. Does your household get internet through Wi-Fi/Broadband connection?
- Q2ii. Does your household get internet through a USB dongle?
- Q5. Does your household have a Television set, and if yes, which type?
- Q6. Does your household get any newspaper at home or buy one from the market on an everyday basis?
- Q7. Does your household get any magazine at home or buy one from the market on a regular basis? By regular I mean every week, fortnight or month etc.
- B12h. Does your household or any member of your household have/ own music system or transistor?

Step 1: First, access to various media at the household level was determined one by one.

Computer/laptop/tablet access was determined by answers to Q3b. The possible responses to the question were 'yes' or 'no'. A 'yes' answer was scored as 1 and a 'no' answer as 0. Those who did not respond to the question were also assigned 0 points.

Mobile phone access was determined by answers to B11a and Q1. In B11a, all answers other than '0'/'none' were scored as 1. 'None/0' and non-response were scored as 0. In Q1, the possible responses were 'yes' or 'no'. A 'yes' answer was scored as 1 and a 'no' answer as 0. Non-response was also assigned 0 points.

Smartphone access was determined by answers to B11b and Q1a. In B11b, all answers other than '0'/'none' were scored as 1. 'None/0', non-response and not applicable were scored as 0. In Q1a, the possible responses were 'ordinary phone', 'smartphone' or 'both'. A 'smartphone' answer and a 'both' answer were scored as 1. An 'ordinary phone' answer and non-response were scored as 0.

Internet access at home through Wi-Fi/broadband or dongle was determined by answers to Q2i and Q2ii. In both questions, the possible responses were either 'yes' or 'no'. While a 'yes' answer was scored as 1, a 'no' answer and a 'don't know'/non-response were scored as 0.

TV access was determined through answers to Q5. Those who said 'yes' they had some type of TV at home (old style or flat screen or both) were scored as 1. A 'no' answer and non-response were scored as 0.

Newspaper access/subscription was determined by answers to Q6. The possible responses were 'yes', 'often' or 'no'. A 'yes' or 'often' answer was scored as 1 and a 'no' answer or non-response were assigned 0 points.

Magazine access/subscription was determined by answers to Q7. The possible responses were 'yes', 'often' or 'no'. A 'yes' or 'often' answer was scored as 1 and a 'no' answer or don't know/non-response were assigned 0 points.

Music system/transistor access was determined by answers to B12h. The possible responses were 'yes' or 'no'. A 'yes' answer was scored as 1 and a 'no' answer or non-response were assigned 0 points.

Step 2: The scores of all 8 categories were summed up. The resulting summated scores ranged from 0 to 8.

Step 3: The summated scores were then distributed across four newly created categories that indicated different degrees of media presence at the household level. Summated scores ranging from 5-8 were categorized as 'High media presence'. Summated scores of 3 or 4 were categorized as 'Moderate media presence'. Summated scores of 1 or 2 were considered as 'Low media

presence'. Finally, a summated score of 0 was categorized as 'No media presence'.

INDEX OF INTENSITY OF MOBILE PHONE USAGE/ SMARTPHONE USAGE (used in Sections 2 and 7)

The index was constructed by taking into account 14 questions asked to mobile phone users in the survey. They are:

- Q1gi: (If uses a mobile phone) How much do you use the mobile phone for sending/reading messages or SMSs?
- Q1giii: (If uses a mobile phone) How much do you use the mobile phone for video calling?
- Q1giv: (If uses a mobile phone) How much do you use the mobile phone for playing video games?
- Q1gv: (If uses a mobile phone) How much do you use the mobile phone for watching films, serials, vlogs, videos?
- Q1gvi: (If uses a mobile phone) How much do you use the mobile phone for watching an OTT platform like Netflix/ Prime Video/Hotstar/Voot/ SonyLiv/Zee5/MX Player etc.?
- Q1gvii: (If uses a mobile phone) How much do you use the mobile phone for using social media such as Facebook or Twitter or Instagram, etc.?
- Q1gviii: (If uses a mobile phone) How much do you use the mobile phone for watching or reading news?
- Q1gix: (If uses a mobile phone) How much do you use the mobile phone for taking photographs of yourself/selfies?
- Q1gx: (If uses a mobile phone) How much do you use the mobile phone for taking photographs of things, people, places, scenery around you?

- Q1g_xi: (If uses a mobile phone) How much do you use the mobile phone for banking or paying bills?
- Q1g_xii: (If uses a mobile phone) How much do you use the mobile phone for listening to music/songs?
- Q1g_xiii: (If uses a mobile phone) How much do you use the mobile phone for buying things or ordering food or booking something like a cab or a ticket?
- Q1g_xiv: (If uses a mobile phone) How much do you use the mobile phone for finding out directions, locations, routes or travel time?
- Q1g_xv: (If uses a mobile phone) How much do you use the mobile phone for studying or attending online classes?

In each question, the response options offered to the respondent were 'quite a lot', 'somewhat', 'very little', and 'never'.

Step 1: An answer that was 'quite a lot' was assigned a score of 3, 'somewhat' was scored as 2, 'very little' as 1 and 'never' and those who did not give a response were scored as 0. Responses that were not applicable (i.e., those who didn't use a mobile phone) were set as missing.

Step 2: The scores of all 14 questions were summed up. The resulting summated scores ranged from 0 to 42.

Step 3: The summated scores were distributed across four newly created categories that indicated different degrees of mobile phone usage. Summated scores that ranged from 33-42 were categorized as 'Very high usage'; summated scores that ranged from 22-32 were categorized as being 'High usage'; summated scores ranging from 11-21 were categorized as 'Moderate usage'; and summated scores that ranged from 0-10 were categorized as 'Little usage'.

Step 4: In order to know the intensity of smartphone usage specifically, the index was cross tabulated with Q1a, i.e.; type of mobile phone used.

INDEX OF NEWS CONSUMPTION (used in Sections 5 and 7)

The index was constructed by taking into account 3 questions asked in the survey. They are:

- Q12: How often do you watch news channels, be it on TV or mobile phone or computer-laptop – many times a day, once or twice a day, many times a week, once or twice a week, very little or never?
- Q13: About how often do you read a Newspaper – daily, many times a week, once or twice a week, very little or never?
- Q21a: (If internet user) How often do you visit news and current affairs websites – daily, many times a week, once or twice a week, very little or never?

In Q12, the option categories offered to the respondent were 'many times a day', 'once or twice a day', 'many times a week', 'once or twice a week', 'very little' and 'never'.

In Q13 and Q21a, the option categories offered to the respondent were 'daily', 'many times a week', 'once or twice a week', 'very little' and 'never'. In Q21a, a silent option of 'whenever need arises' was also kept just in case someone were to say it.

Step 1: In all three questions, i.e., Q12, Q13 and Q21a, all answers except for 'never' and non-response were assigned a score of 1. Such respondents were to be treated as consumers. On the other hand respondents who said 'never' or gave no response were assigned a score of 0 and treated as non-consumers.

Step 2: Based on whether a person is a consumer of news channels, newspapers and news websites or not, 8 categories were created –

Category 1: Those who consumed all three, i.e., watched news channels, read newspapers and visited news websites

Category 2: Those who watched news channels, read newspapers but didn't visit news websites

Category 3: Those who watched news channels, visited news websites but did not read newspapers

Category 4: Those read newspapers, visited news websites but did not watch news channels

Category 5: Those who watched news channels only

Category 6: Those who read newspapers only

Category 7: Those who visited news websites only

Category 8: Those who didn't obtain news from any of the three sources

Step 3: The detailed index of news consumption was also collapsed into a smaller index in which category 1 was labelled as those who got news from multiple sources; categories 2, 3 and 4 were combined and labelled as those who got news from 2 sources; categories 5, 6 and 7 were combined and labelled as those who got news only from one source; and category 8 was labelled as those who didn't obtain news from any source.

INDEX OF SOCIAL MEDIA USAGE (used in Sections 3, 4 and 7)

The index was constructed by taking into account 14 questions asked in the survey. They are:

- Q23a: How often do you use or go

through Facebook or Facebook messenger?

- Q23b: How often do you use or go through Twitter?
- Q23c: How often do you use or go through Instagram?
- Q23d: How often do you use or go through YouTube?
- Q23e: How often do you use or go through Koo?
- Q23f: How often do you use or go through Clubhouse?
- Q23g: How often do you use or go through Snapchat?
- Q23h: How often do you use or go through LinkedIn?
- Q23i: How often did you use or go through TikTok before it was banned?
- Q23j: How often do you use or go through WhatsApp?
- Q23k: How often do you use or go through Telegram?
- Q23l: How often do you use or go through Signal?
- Q23m: How often do you use or go through Tinder, Bumble or some other similar app?
- Q23n: How often do you use or go through Some other app like ShareChat, Chingari, Roposo, Mirton, Bolo Indya, Public App, Josh, Taka Tak, Moj, Triller etc?.

In each question, the response options offered to the respondent were 'many times a day', 'once or twice a day', 'many times a week', 'once or twice a week', 'very little' and 'never'.

Step 1: In all questions, all answers except for 'never', non-response and not applicable were assigned a score of 1. Such respondents were to be treated as users of that particular social

media platform. On the other hand respondents who said 'never' or gave no response or to whom the question wasn't asked because they were not internet users were assigned a score of 0 and treated as non-users.

Step 2: The scores of all 14 questions were summed up. The resulting summated scores ranged from 0 to 14.

Step 3: The summated scores were distributed across five newly created categories that indicated different degrees of social media usage. Summated scores that ranged from 10-14 were categorised as 'Uses 10 or more social media or messaging platforms'. Summated scores that ranged from 6-9 were categorised as being 'Use 6-9 platforms'. Summated scores ranging from 3-5 were categorised as 'Uses 3-5 platforms'. Summated scores that ranged from 1-2 were categorised as 'Uses 1-2 platforms' and summated scores that totalled 0 were categorised as 'Uses no social media or messaging platform'.

INDEX OF POLITICAL LEANING (used in Sections 3, 4, 6 and 7)

The index was constructed by taking into account 2 questions asked in the survey. They are:

Q39. Suppose Lok Sabha elections take place in the country tomorrow due to some reason, then which party will you vote for?

Q41. Suppose Vidhan Sabha elections take place in your State tomorrow due to some reason, then which party will you vote for?

Both the questions were open ended and no party names were offered to the respondent beforehand.

For determining party leaning, the Lok Sabha question was given greater weightage. Those who took the BJP's name in both the questions or just in the question related to the Lok Sabha election were categorised as 'BJP leaning'; those who took the Congress's name in both the questions or just in the question related to the Lok Sabha election were categorised as 'Congress leaning'; and those who took some other party's name in both the questions or just in the question related to the Lok Sabha election were categorised as 'Others leaning'. Meanwhile, those who took a party's name in the Vidhan Sabha question but not in the Lok Sabha one were categorised as having 'No clear leaning'. Those who did not give any political preference in either of the two questions were categorised as having 'Expressed no choice'.

Appendix II: Interview Schedule

LOKNITI-CSDS SURVEY 2022: MEDIA IN INDIA: ACCESS, PRACTICES, CONCERNS & EFFECTS

Field investigator (fi) to fill out a1 to a6 before approaching a house

A1. Click on State Name

- | | | | |
|--------------------|-------------------|-----------------|--------------------|
| 01. Andhra Pradesh | 03. Assam | 04. Bihar | 06. Gujarat |
| 07. Haryana | 10. Karnataka | 11. Kerala | 12. Madhya Pradesh |
| 13. Maharashtra | 18. Odisha | 19. Punjab | 20. Rajasthan |
| 22. Tamil Nadu | 24. Uttar Pradesh | 25. West Bengal | 30. Delhi |
| 33. Jharkhand | 34. Chhattisgarh | 36. Telangana | |

A2a. Write your own name: _____

A2b. Enter your roll no.: _____

A3a. Write the Assembly Constituency name: _____

A3b. Enter the Assembly Constituency no.: _____

A4. Enter the Polling Station no.: _____

A5a. If approaching a person from Voter roll, enter their Voter roll no.: _____ 9999.
Not applicable

A5b. If asking for the interview of a 15 to 17-year-old, enter serial no.: _____ 99. Not applicable (NA)

A6. What type of location is it? **(FI to see/find out on reaching the location and then determine)**

1. Village (*Has a Gram panchayat*)
2. Town (*Has less than 1 lakh population and with either a Nagar Panchayat or Nagar Palika*)
3. Small City (*Has 1 lakh to 9 lakh population and with either a Nagar Palika or Nagar Nigam*)
4. Medium City (*Has 10 lakh to 19 lakh population and with a Nagar Nigam*)
5. Big City (*Has 20 lakh to 49 lakh population and with a Nagar Nigam*)
6. Metropolis/Megalopolis (*50 lakh and above population and with a Nagar Nigam*)

Knock on the door or ring the bell...

A7. Field Investigator's introduction & taking the respondent's informed consent:

My name is _____. I am student at _____. I have come on behalf of the Lokniti programme of the Centre for the Study of Developing Societies or CSDS, a research organization that is based in Delhi. We are conducting a comprehensive media-related survey among many people across India in which we are finding out from them about their usage of different sources of information such as TV, phones and internet, what they like to watch, read or listen to, and their concerns and attitudes regarding media and politics. I would like to take your interview in this regard. Every person over the age of 15 has an equal chance of being included in this survey and you have been selected by chance through a procedure. There is no risk and also no benefit in participating in this survey and your participation is voluntary. But if you answer our questions, you will help us in understanding what the public feels about the media today. This survey is an independent study and is not linked to any political party or government. Your identity and whatever information you provide will be kept strictly confidential. You can withdraw at any point during the interview without giving any explanation. The findings of this national survey will be eventually shared with the people in the form of a report. It usually takes about 40-45 minutes to complete this interview. It may even take less time than that. I would be grateful if you could spare some time & help me in completing the survey.

A8. Does the person approached agree to be interviewed?

1. Yes (**Go to the next question**)
2. Yes, but someone else from household from the same gender and of around the same age agrees to be interviewed (**Go to the next question**)
3. No (**Stop the discussion here and go to some other house**)

Start the interview

B1. Gender of the respondent

1. Female
2. Male
3. Other

B2. What is your age?

_____ Years old

o. Did not tell or did not know

B3. How educated are you - I mean up to what class/level have you studied?

1. Non-literate (Can't read or write at all)
2. Less than Primary
3. Primary pass (Class 5)

4. Middle pass (Class 8)
5. Matriculation pass (Class 10)
6. Studying in Class 11 or 12 or junior college
7. Intermediate pass (Class 12)
8. Diploma (after Class X or XII)
9. Graduate/pursuing it/in college
10. Post Graduate/pursuing it
11. Higher degree (MPhil, PhD)
12. Professional courses/degree/pursuing it (Law, engg. etc).
98. No response

B4. What is your mother tongue - I mean which language have you mostly grown up speaking at home from early childhood?

1. Hindi
2. English
3. Urdu
4. Bengali
5. Telugu
6. Tamil
7. Malayalam
8. Kannada
9. Marathi
10. Gujarati
11. Assamese
12. Odia
13. Punjabi
14. Sanskrit
15. Maithili
16. Konkani
17. Sindhi
18. Santhali
19. Nepali
20. Kashmiri
21. Dogri
22. Manipuri/Meitei
97. Any other language (**note**) _____
98. Did not respond
99. Not Applicable

Q1. Do you have a mobile phone of your own that is always or mostly used by only you?

1. Yes
2. No (**Go straight to Q1e**)

98. No response (**Go straight to Q1e**)

Q1a. (If 1. Yes in Q1) What kind of a mobile phone is it – an ordinary phone where you have to press buttons to call someone or a smartphone where you have to touch the glass screen to make a call?

1. Ordinary phone
2. Smartphone
3. Have both types

98. No response

99. NA

Q1b. (If 1. Yes in Q1) Do you use Internet on your mobile phone, and if yes through which type of data plan – a prepaid recharge plan or a postpaid data plan?

1. Yes, Prepaid
2. Yes, Postpaid
3. Yes, Both
4. Yes, but don't know about the plan
5. Yes, but through some other way (Wi-Fi, Hotspot etc.)/for free
6. No, don't have internet on phone
7. Don't know at all/didn't understand question

98. No response

99. NA

Q1c. (If 1/2/3/4/5 in Q1b) How is the internet speed/connection on your mobile phone - is it always good, mostly good, sometimes good-sometimes poor, or is it mostly poor?

1. Always good
2. Mostly good
3. Sometimes good-sometimes poor
4. Mostly Poor
7. Depends on the place or type of connection (**if someone says so**)

98. No response

99. NA

Q1d. (If 1. Yes in Q1) Which telecom company's service/SIM card do you use on your mobile phone – BSNL, Vodafone-Idea, Bharti-Airtel or Reliance-Jio? (**If respondent gives more than one answer then ask which one of them is used most**)

1. BSNL (Incl. MTNL)
2. Vodafone Idea
3. Bharti Airtel (Incl. Tata, Telenor)
4. Reliance Jio
7. Doesn't know/gave some other company's name that has ceased to exist
98. No response
99. NA

Q1e. (If 2. OR 8. in Q1) In the last few months have you ever used a mobile phone of a household member or relative/friend/neighbor/colleague - be it for talking or messaging or for something else?

1. Yes
2. No
98. No response
99. NA

Q1f. (If 1 in Q1 OR 1 in Q1e) Think carefully and tell – nowadays, out of 24 hours of the day, how many hours in total are you spending on the mobile phone? **(Note down number of hours. Answer shouldn't exceed 24; if answer is less than an hour, type 0; suppose answer is 2-3 hours or 10-11 hours then record 3 and 11 as answers)**

_____ Hours

98. No response
99. NA

Q1g. (If 1 in Q1 OR 1 in Q1e) How much do you use the mobile phone for these activities – quite a lot, somewhat, very little or never?

	1. Quite a lot	2. Somewhat	3. Very Little	4. Never	98. No response	99. NA
i. Sending/reading messages or SMSs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ii. Making/receiving phone calls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
iii. Video calling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
iv. Playing video games	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
v. Watching films, serials, vlogs, videos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
vi. Watching an OTT platform like Netflix/ Prime Video/Hotstar/Voot/SonyLiv/Zee5/ MX Player etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
vii. Using social media such as Facebook or Twitter or Instagram, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
viii. Watching or reading news	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ix. Taking photographs of yourself/selfies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	1. Quite a lot	2. Somewhat	3. Very Little	4. Never	98. No response	99. NA
x. Taking photographs of things, people, places, scenery around you	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
xi. Banking or paying bills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
xii. Listening to music/songs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
xiii. Buying things or ordering food or booking something like a cab or a ticket	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
xiv. Finding out directions, locations, routes or travel time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
xv. For studying or attending online classes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q2. Does your household get internet through these mediums?

	1. Yes	2. No	7. Didn't understand/ doesn't know	98. No response
i. Wi-Fi/Broadband connection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ii. USB dongle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
iii. A family member's Hotspot connection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q2a. (If 1. Yes in Q2i or Q2ii or Q2iii) So along with others in the household do you also ever use the internet using this/these mediums?

1. Yes

2. No

7. Didn't understand/doesn't know

98. No response

99. NA

Q3. Now I'll ask you questions about some things. Please tell me...

	1. Yes	2. No	7. Didn't understand	98. No response
a. Have you ever used a computer or laptop or tablet either at home or outside?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Do you or any of your household members own a computer or laptop or tablet?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. In the last few years, have you or any member of the household been provided a smartphone or computer-laptop or tablet by the government for the purposes of studying or as a prize, or been given money to buy it?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q4. Just to confirm once again - in the last one to two months, have you used the internet for any purpose either on a mobile phone or a computer/laptop/tablet? By internet I mean websites, email, social media, WhatsApp, YouTube, PayTM etc.

1. Yes
2. No
98. No response

Q5. Does your household have a Television set, and if yes which type? **(Read out the two TV types if required)**

1. Yes, old style Tube TV in a box form
2. Yes, Flat screen LED/LCD/Plasma/Smart TV
3. Yes, Have both types
4. No, no TV at home
98. No response

Q5a. (If 1/2/3 in Q5) Do you have these connections on your TV..?

	1. Yes	2. No	3. Both	4. Not on TV but on phone	7. Could not understand	98. No response	99. NA
i. a Cable connection or DTH Dish Antenna connection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ii. Any OTT platform connection like Netflix or Prime Video or Hotstar or Voot or SonyLiv or Zee5 or MX Player etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q6. Does your household get any newspaper at home or buy one from the market on an everyday basis?

1. Yes
2. No
3. Not everyday but often/many times
98. No response

Q7. Does your household get any magazine at home or buy one from the market on a regular basis? By regular I mean every week, fortnight or month etc.

1. Yes
2. No
3. Not regularly but often/many times
4. Don't know
98. No response

Q8. About how often do you watch Television – daily, many times a week, once or twice a week, very little or never? **(Ask everyone irrespective of whether they have a TV or not at home)**

1. Daily
2. Many times a week
3. Once or twice a week
4. Very little
5. Never
98. No response

Q8a. (If 1. Daily in Q8) Think carefully and tell - nowadays out of 24 hours of the day, how many hours in total are you spending watching TV? **(Note down the number of hours. The answer should not exceed 24; if answer is less than one hour then type 00)**

_____ 98. No response 99. NA

Q8b. (If 1/2/3/4 in Q8) There are many channel types on TV. How often do you watch these types of channels – daily, many times a week, once or twice a week, very little or never?

	1. Daily	2. Many times a week	3. Once or twice a week	4. Very little	5. Never	6. Whenever there is an event	8. No response	99. NA
i. Entertainment channels – serials or reality shows or movies or music	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ii. Sports channels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
iii. News channels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
iv. Knowledge channels (history, wildlife, travel and tourism etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
v. Food/cookery channels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
vi. Religion and spirituality channels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q8c. (If 1/2/3/4 in Q8) And which of these channels do you usually watch the most. Let me read them out again - entertainment channels, sports channels, news channels, knowledge channels, cookery channels or religion and spirituality channels? (Stress on the word 'the most' if the respondent gives more than one answer)

1. Entertainment channels – serials, movies, music
2. Sports channels
3. News channels
4. Knowledge channels

5. Food/ cookery channels
6. Religion and spirituality channels
7. Something else (note down) _____
98. No response
99. NA

Q9. How often do you watch these things either on TV or mobile phone or computer or a hall – daily, many times a week, once or twice a week, very little or never?

	1. Daily	2. Many times a week	3. Once or twice a week	4. Very little	5. Never	8. No response
a. Films	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. TV serials/dramas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Reality shows or talent hunt shows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q10. And in which language do you mostly watch the following? (**Stress on the word 'mostly' if the respondent gives more than one answer**)

Q10a. (If 1/2/3/4 in Q9a) Films?

- | | |
|--|--|
| <ol style="list-style-type: none"> 1. Hindi 2. English 3. Urdu 4. Bengali 5. Telugu 6. Tamil 7. Malayalam 8. Kannada 9. Marathi 10. Gujarati 11. Assamese 12. Odia 13. Punjabi 14. Sanskrit 15. Maithili 16. Konkani 17. Sindhi 18. Santhali 19. Nepali 20. Kashmiri | <ol style="list-style-type: none"> 21. Dogri 22. Manipuri/Meitei 97. Any other language (note) _____ 98. Did not respond 99. Not Applicable |
|--|--|

Q10b. (If 1/2/3/4 in Q9b) TV serials/dramas?

1. Hindi
2. English
3. Urdu
4. Bengali
5. Telugu
6. Tamil
7. Malayalam
8. Kannada
9. Marathi
10. Gujarati
11. Assamese
12. Odia
13. Punjabi
14. Sanskrit

15. Maithili
16. Konkani
17. Sindhi
18. Santhali
19. Nepali
20. Kashmiri
21. Dogri
22. Manipuri/Meitei
97. Any other language (note) _____
98. Did not respond
99. Not Applicable

Q11. Through which medium do you mostly get/obtain News?

(Do not read out the options. First record the answer & then click on the suitable option below. Only one answer has to be taken) _____

1. Television/TV news channels
2. Newspapers/Magazines (Print)
3. Radio
4. Mobile phone
5. Internet/Online news websites
6. Social media platforms
7. YouTube (if someone says so specifically)
8. WhatsApp (if someone says so specifically)
9. Facebook (if someone says so specifically)
10. Twitter (if someone says so specifically)
11. Friends/neighbors
12. Family/relatives
13. Area head/village head
14. People
15. Any other answer
90. Don't bother about obtaining news
98. No response

Q12. How often do you watch news channels, be it on TV or mobile phone or computer-laptop – many times a day, once or twice a day, many times a week, once or twice a week, very little or never?

1. Many times a day
2. Once or twice a day
3. Many times a week
4. Once or twice a week
5. Very little
6. Never
98. No response

Q12a. (If 1/2/3/4/5 in Q12) Overall, the news channel/s that you watch, in which language is/are they mostly? **(Stress on the word 'mostly' if the respondent gives more than one answer)**

1. Hindi
2. English
3. Urdu
4. Bengali
5. Telugu
6. Tamil
7. Malayalam
8. Kannada
9. Marathi
10. Gujarati
11. Assamese
12. Odia
13. Punjabi
14. Sanskrit
15. Maithili
16. Konkani
17. Sindhi
18. Santhali
19. Nepali
20. Kashmiri
21. Dogri

22. Manipuri/Meitei
 97. Any other language (note) _____
 98. Did not respond
 99. Not Applicable

Q12b. (If 1/2/3/4/5 in Q12) Which news channel do you watch the most?

998. No response
 999. Not applicable

Q12c. (If 1/2/3/4/5 in Q12) Between these two types of programmes on a news

channel, which do you generally prefer watching more – a news bulletin that shows news and reports one after another OR a programme where a particular news is discussed and debated by experts or politicians? **(Stress on the word 'more' if the respondent says both at first)**

1. News bulletin with news and reports
 2. Debates and discussions
 3. Difficult to say/both
 98. No response
 99. NA

Q12d. (If 1/2/3/4/5 in Q12) How much do you watch any news channel belonging to these media groups, be it in Hindi, English or your mother tongue – daily, quite often, sometimes, very little or never?

	1. Daily	2. Quite often	3. Sometimes	4. Very little	5. Never	8. No response	99. NA
i. Doordarshan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ii. NDTV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
iii. Republic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
iv. ABP	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
v. Zee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
vi. Times Now or Navbharat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
vii. India Today or Aaj Tak	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
viii. TV 9	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ix. News18	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q13. About how often do you read a Newspaper – daily, many times a week, once or twice a week, very little or never? **(Even if the respondent gets the newspaper read out by someone, even then the question is applicable on him/her)**

1. Daily
 2. Many times a week
 3. Once or twice a week
 4. Very little
 5. Never
 98. No response

Q13a. (If 1/2/3/4 in Q13) The newspaper/s you read, in which language is/are they mostly? **(Stress on the word 'mostly' if the respondent gives more than one answer)**

1. Hindi
2. English
3. Urdu
4. Bengali
5. Telugu
6. Tamil
7. Malayalam
8. Kannada
9. Marathi
10. Gujarati
11. Assamese
12. Odia
13. Punjabi
14. Sanskrit
15. Maithili
16. Konkani
17. Sindhi
18. Santhali
19. Nepali
20. Kashmiri
21. Dogri
22. Manipuri/Meitei
97. Any other language (note) _____
98. Did not respond
99. Not Applicable

Q13b. (If 1/2/3/4 in Q13) Which newspaper do you read the most?

-
998. No response
 999. Not applicable

Q14. About how often do you listen to programmes or songs that come on radio - daily, many times a week, once or twice a week, very little or never?

1. Daily
2. Many times a week
3. Once or twice a week
4. Very little
5. Never
98. No response

Q15. During the last one year, how often have you listened to the Prime Minister's 'Mann ki baat' programme – almost every month, most months, some months, once or twice or never?

1. Almost every month/always
2. Most months
3. Some months
4. Once or twice
5. Never
98. No response

Q16. Generally, what kind of news do you like to read/watch/listen to the most – local news from your city/district, news from your state, news from different parts of the country or news of events happening abroad? **(Stress on the word 'the most' if the respondent gives more than one answer)**

1. City/district news
2. State news
3. National news
4. International news
5. Something else (note it down) _____
7. Not interested in news, so can't say
98. No response

Q17. How much do you trust the news disseminated by these news media – quite a lot, somewhat, very little or not at all?

	1. Quite a lot	2. Somewhat	3. Very little	4. Not at all	5. Depends on which newspaper/channel/site (if someone says so)	6. Can't say since don't read/watch much or at all	98. No response
a. Doordarshan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Private news channels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Newspapers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Aakaashwaani All India Radio	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Online news websites	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q18. In your opinion is the news media in India these days FREER to show the truth compared to a few years ago or is it LESS FREE to do so?

1. More free/freer
2. Less free
3. As free as before (only if someone says so)
4. As unfree as before (only if someone says so)
5. It depends on the channel/newspaper/site (only if someone says so)
98. No response

Q19. Do you think the attention given by the news media to the issues and problems of these people is a lot, as much as it should be, little or too less?

	1. A lot	2. As much as it should be	3. Little	4. Too less/not at all	5. Depends on the channel/paper/site (if someone says so)	98. No response
a. Common man's issues and problems	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Rural areas'...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Muslims'...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Poor and economically weaker people's ...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Farmers'...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Dalits'...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. Women's...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. Adivasis'...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. Rich or big people's...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
j. Your caste-community's ...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q20. In your opinion, does the news media of India portray each of these too favorably or too unfavorably or is their portrayal of them unbiased?

	1. Too favorably	2. Too unfavorably	3. Unbiased	4. Inadequately (if someone says so)	5. Depends on the organisation (if someone says so)	98. No response
a. The Modi Government	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. The Opposition parties opposing the Modi government	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

QUESTIONS Q21 TO Q32 WERE FOR INTERNET USERS ONLY - Internet users defined as those who either said 1/2/3/4/5 in Q1b OR 1 in Q2a OR 1 in Q4

Q21. How often do you do these on the internet – daily, many times a week, once or twice a week, very little or never?

	1. Daily	2. Many times a week	3. Once or twice a week	4. Very little	5. Never	6. Whenever need arises (if someone says so)	98. No response	99. NA
a. Visit news and current affairs websites	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Use email	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Search for information on a search engine like Google, Yahoo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Consult/search for information on Wikipedia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Download or stream movies for free	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Use Zoom, Google Meet, Skype etc. to attend meetings/ or chat with people	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q22. And how often do you do these on the internet or a social media or WhatsApp - daily, many times a week, once or twice a week, very little or never?

	1. Daily	2. Many times a week	3. Once or twice a week	4. Very little	5. Never	6. Whenever need arises (if someone says so)	98. No response	99. NA
a. Post an opinion of your own on some issue or share a link	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Post photos (selfies)/videos of yourself	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Post other photos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Post a video, vlog or audio made by you	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Write a blog	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q23. How often do you use or go through these social media and messaging platforms - many times a day, once or twice a day, many times a week, once or twice a week, very little or never?

	1. Many times a day	2. Once or twice a day	3. Many times a week	4. Once or twice a week	5. Very little	6. Never/ not heard/no account	98. No response	99. NA
a. Facebook or Facebook messenger	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Twitter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Instagram	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. YouTube	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Koo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Clubhouse	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. Snapchat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. LinkedIn	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. TikTok (before ban)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
j. WhatsApp	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
k. Telegram	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
l. Signal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
m. Tinder, Bumble or some other similar app	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
n. Some other app like ShareChat, Chingari, Roposo, Mirton, Bolo Indya, Public App, Josh, Taka Tak, Moj, Triller etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q24. In the last one year or so, how often have you posted your views on politics and public matters or shared some political news, on these social media – many times, sometimes, once or twice or never?

	1. Many times	2. Sometimes	3. Once or twice	4. Never	8. No response	99. NA
a. (If 1/2/3/4/5 in Q23a) Facebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. (If 1/2/3/4/5 in Q23b) Twitter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. (If 1/2/3/4/5 in Q23c) Instagram	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. (If 1/2/3/4/5 in Q23d) YouTube	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. (If 1/2/3/4/5 in Q23j) WhatsApp	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q25. In the last one year or so, how many times did it happen to you that after writing or sharing something on these social media you were threatened or harassed/troubled by a known or unknown person – many times, sometimes, once or twice or never?

	1. Many times	2. Sometimes	3. Once or twice	4. Never	8. No response	99. NA
a. (If 1/2/3/4/5 in Q23a) Facebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. (If 1/2/3/4/5 in Q23b) Twitter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. (If 1/2/3/4/5 in Q23c) Instagram	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. (If 1/2/3/4/5 in Q23d) YouTube	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. (If 1/2/3/4/5 in Q23j) WhatsApp	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q26. How concerned do you feel about your privacy and confidentiality while using these social media – a lot, somewhat, not much or not at all? I mean how worried do you feel that your activity could be monitored by someone you don't know or don't want to share the information with.

	1. Quite a lot	2. Somewhat	3. Not much	4. Not at all	98. No response	99. NA
a. (If 1/2/3/4/5 in Q23a) Facebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. (If 1/2/3/4/5 in Q23b) Twitter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. (If 1/2/3/4/5 in Q23c) Instagram	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. (If 1/2/3/4/5 in Q23d) YouTube	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. (If 1/2/3/4/5 in Q23j) WhatsApp	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. (If 1/2/3/4/5 in Q23k) Telegram	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. (If 1/2/3/4/5 in Q23l) Signal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q27. Generally, how much do you trust the information or news that you come across or receive on these social media – highly, somewhat, very little or not at all?

	1. Highly trust	2. Somewhat trust	3. Very little trust	4. Not at all	5. Depends on the sharer	98. No response	9. NA
a. (If 1/2/3/4/5 in Q23a) Facebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. (If 1/2/3/4/5 in Q23b) Twitter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. (If 1/2/3/4/5 in Q23c) Instagram	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. (If 1/2/3/4/5 in Q23d) YouTube	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. (If 1/2/3/4/5 in Q23e) Koo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. (If 1/2/3/4/5 in Q23g) Clubhouse	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. (If 1/2/3/4/5 in Q23j) WhatsApp	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. (If 1/2/3/4/5 in Q23k) Telegram	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. (If 1/2/3/4/5 in Q23l) Signal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q28. (If 1/2/3/4/5 in Q23a or Q23j or Q23k or Q23l) Are you a part of any of these groups on any messenger app like Whatsapp or Telegram or Signal or Facebook?

	1. Yes	2. No	8. No response	9. NA
a. Groups discussing politics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Groups affiliated to a political party or political leader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Groups of your family or friends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Groups related to your religion/imparting religious knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Groups related to your caste or community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Hobby groups like cookery, sports, film discussion groups etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. Groups related to your work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. Any other groups	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q29. How concerned are you about receiving or being misled by inaccurate or fake information on the internet, social media or WhatsApp etc. – a lot, somewhat, not much or not at all?

- | | |
|-------------|-----------------|
| 1. A lot | 4. Not at all |
| 2. Somewhat | 98. No response |
| 3. Not much | 99. NA |

Q30. How often have these things happened to you – very often, a few times, once or twice or never?

	1. Very often	2. Few times	3. Once or twice	4. Never	98. No response	99. NA
a. You were misled by inaccurate or fake information shared by someone else on social media or WhatsApp	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. You yourself shared or forwarded some information or news on the internet or social media or WhatsApp and realized later that it was inaccurate or fake.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q31. How much do you trust these organisations to ensure the secrecy/confidentiality of your personal data and activities on the internet – a lot, somewhat, very little or not at all?

	1. A lot of trust	2. Somewhat trust	3. Very little	4. Not at all	5. Depends on platform/site	98. No response	99. NA
a. The company whose internet you are using. I mean your internet service provider	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Search engine companies such as Google, Yahoo etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Social networking companies such as Facebook, Twitter, YouTube etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Government services on the internet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q32. In the last one year, how often have you thought twice before expressing an opinion on political and public matters on social media or WhatsApp groups OR stopped yourself from doing so, BECAUSE you feared being misunderstood or seen in a bad light by people you know or feared being harassed by strangers - very often, sometimes, rarely or never?

1. Very often
2. Sometimes
3. Rarely
4. Never
5. Don't express political opinions ever
7. Didn't understand the question
98. No response
99. NA

Q33. Do you or a member of your household make money or have you ever made money by posting videos or photos on social media like YouTube, Instagram, TikTok, Facebook, Twitter etc.? *(If yes, ask who – they themselves or some other member from house)*

1. Yes, they themselves
2. Yes, some other member of house
3. No
4. Have tried
98. No response

Q34. Some people believe that the government monitors what people do on the Internet or on their phones, while some others believe that the government doesn't do any such thing. What do you think? Does the government monitor or not monitor?

1. Yes, Government monitors
2. No, Government doesn't monitor
3. Monitors some people, not all (Only if someone says so)
7. Don't know
98. No response

Q35. Do you agree or disagree with these statements? *(On receiving answer, probe further whether fully or somewhat)*

	1. Fully agree	2. Somewhat agree	3. Somewhat disagree	4. Fully disagree	98. No response
a. Even if an idea is offensive, there is nothing wrong if people express it on social media or WhatsApp	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. People should be free to say whatever they feel about their government on social media or WhatsApp, however objectionable or offensive their opinion may be.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Social media or WhatsApp are safe places to express one's opinion on politics and public matters.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q36. If any government did these things, then in your opinion, will it be right or wrong in doing so? (Probe further whether fully or somewhat)

	1. Fully right	2. Somewhat right	3. Somewhat wrong	4. Fully wrong	5. OK if it is for security	7. Did not understand	98. No response
a. Monitor what people post on social media or WhatsApp etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Find out who people talk to on the phone or what they talk about	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Determine what can or cannot be posted on social media or WhatsApp	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Shutdown internet services in an area for a certain period of time on law and order grounds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q37. Suppose you have to spend a day without these things for some reason, how restless would you feel without them – extremely restless, somewhat restless, not much restless or not at all restless?

	1. Extremely restless	2. Somewhat restless	3. Not much restless	4. Not at all restless	98. No response	99. NA
a. (If 1/2/3/4/5 in any Q23 sub question) Your favourite social media platform like FB, Twitter, Instagram, YouTube etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. (If 1/2/3/4 in Q13) Newspaper	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. (If 1 in Q1) Your Phone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. (If 1/2/3/4/5 in Q8) TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q38. Have you ever attempted to reduce these because you felt you were spending too much time on them?

	1. Yes	2. No	98. No response	99. NA
a. (If 1/2/3/4/5 in any Q23 sub question) Usage of any social media platform like FB, Twitter, Instagram, YouTube etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. (If 1/2/3/4 in Q13) Your Newspaper reading	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. (If 1 in Q1 or 1 in Q1e) Mobile phone usage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. (If 1/2/3/4/5 in Q8) Your TV viewing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

I would now like to ask you a few questions related to politics...

Q39. Suppose Lok Sabha elections take place in the country tomorrow due to some reason, then which party will you vote for? ***(First note down the response in the space given and then select the suitable option from the list of options given below)***

1. Congress/INC
2. BJP
3. CPI/CPI (M)/Left parties
4. Trinamool Congress/AITC
5. AAP
6. BSP
7. Samajwadi Party/SP
8. Biju Janata Dal/BJD
9. JDU
10. RJD
11. DMK
12. AIADMK
13. YSRCP
14. TRS
15. Shiv Sena
16. NCP
17. JDS
18. Shiromani Akali Dal/SAD
19. JJP
20. INLD
21. RLD
22. AGP
23. TDP
90. Any other party/regional party
91. Independent
92. NOTA
93. Anyone who can defeat BJP
97. Difficult to say
98. No response/Secret

Q39a. *(If answer is 1 to 91 in Q39)* The party whose name you took right now, are you certain to vote for it even in the Lok Sabha elections of 2024 or your preference can change by then?

1. Certain about voting for it
2. Preference can change
98. No response
99. NA

Q40. If Lok Sabha elections happen now then who would you like to see as the next Prime Minister of the country? ***(First note down the response in the space given and then select the suitable option from the list of options given below)*** _____

01. Narendra Modi
02. Rahul Gandhi
03. Amit Shah
04. Priyanka Gandhi
05. Yogi Adityanath
06. Sonia Gandhi
07. Manmohan Singh
08. Mamata Banerjee
09. Arvind Kejriwal
10. Akhilesh Yadav
11. Mayawati
12. Naveen Patnaik
13. Nitish Kumar
14. Tejashwi Yadav
15. M K Stalin
16. Pinarayi Vijayan
17. Y S Jagan Reddy
18. K Chandrashekhar Rao
19. Uddhav Thackeray
20. Sharad Pawar
21. Chandrababu Naidu
90. Any other leader

91. Anyone can become
92. No one
97. Difficult to say
98. No response

Q41. Suppose Vidhan Sabha elections take place in your State tomorrow due to some reason, then which party will you vote for? **(First note down the response in the space given and then select the suitable option from the list of options given below)**

1. Congress/INC
2. BJP
3. CPI/CPI (M)/Left parties
4. Trinamool Congress/AITC
5. AAP
6. BSP
7. Samajwadi Party/SP
8. Biju Janata Dal/BJD
9. JDU
10. RJD
11. DMK
12. AIADMK
13. YSRCP
14. TRS
15. Shiv Sena
16. NCP
17. JDS
18. Shiromani Akali Dal/SAD
19. JJP
20. INLD
21. RLD
22. AGP
23. TDP
90. Any other party/regional party
91. Independent
92. NOTA
93. Anyone who can defeat BJP
97. Difficult to say
98. No response/Secret

Q42. Are you at present satisfied or dissatisfied with the performance of the current BJP-led NDA government at the Centre? I mean the Modi government (**Probe further whether fully or somewhat**)

1. Fully satisfied
2. Somewhat satisfied
3. Somewhat dissatisfied
4. Fully dissatisfied
98. No response

Q43. Are you at present satisfied or dissatisfied with the performance of your current State government (**Probe further whether fully or somewhat**)

1. Fully satisfied
2. Somewhat satisfied
3. Somewhat dissatisfied
4. Fully dissatisfied
98. No response

Q44. Some people like these leaders and some don't like them. Please tell me about yourself – do you like or dislike these leaders? (**On getting the response ask whether 'strongly' or 'somewhat'**)

	1. Strongly like	2. Somewhat like	3. Somewhat dislike	4. Strongly dislike	5. Difficult to say	8. No response
a. Amit Shah	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Rahul Gandhi	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Mamata Banerjee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Narendra Modi	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Yogi Adityanath	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Arvind Kejriwal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q45. Looking at the work and decisions of the Modi government at the Centre till now, please tell me, which work of the Modi government have you liked the most? (**First note down the response in the space given and then select the suitable option from the list of options given below**) _____

95. No success/achievement
98. No response

Q46. And in your opinion what has been the biggest failure of the Modi government? (**First note down the response in the space given and then select the suitable option from the list of options given below**) _____

95. No failure
98. No response

Before leaving I would like to know some information about you and your family which will help us a lot in our research....

B5. What is your main occupation? What work do you do? **(Note down the response and then click on suitable option below; if retired, try to ascertain his/her previous occupation, if student or housewife, then note down that as well)**

-
01. **Higher professionals** - doctor, lawyer, judge, engineer, architect, scientist, CA, banker, college prof. /school teacher, writer, professional artiste etc.
 02. **Lower professionals** - take tuition classes at an institute, technicians, nurse/midwife, computer operator, data entry, folk artiste, priest, palmist/astrologer, ayurvedic/homeopathic/unaani doctor, NGO worker etc.
 03. **Government Managerial job** - manager, executive, elected representative
 04. **Government Class I-II Administrative job** - administrative officers, army officers, bureaucrats
 05. **Government Class III-IV Clerical job** - steno, guard, army soldier, peon, clerks, superintendents, conductor etc.
 06. **Government Class IV jobs** - chaprasi, sweeper, postman etc.
 07. **Big and middle level businessman** - big shop owner, trader, jeweler, hotelier, big restaurant owner, big transport-travel business, big taxi stand etc.
 08. **Small-level businessman** – small-sized shop, contractor, small transport business, small taxi stand, kirana store, phone booth, internet café, medium-sized dhaba owner, run a tuition/education institute etc.
 09. **Minor/temporary business** – salesperson, tea, paan stall, vegetable seller, very small-sized shop or dhaba, hawker, street vendor, etc.
 10. **Service** - waiter, shop assistant, cook, dhobi, barber, beautician, newspaper man, milkman, delivery boy, housemaid, chowkidaar, sweeper (non govt) etc.
 11. **Skilled worker** - driver, mechanic, electrician, plumber, tailor, jewellery work, sculptor, carpenter, weaver, shoemaker etc.
 12. **Semi-skilled** - mason, potter, stone-cutter, furniture maker
 13. **Labourer** - construction worker, loader, rickshaw puller etc.
 14. **Farmer Cultivator** - tilling own land or someone else's land
 15. **Agricultural/plantation labourers** - landless farm labourers
 16. **Dairy, poultry, animal rearing/fishery**
 17. **Any other occupation** that doesn't fit into any category mentioned above (to be used as last resort)
 18. **Student** - studying (may be doing part-time work along with it)
 19. **Housewife/Stay at home after retirement** (may be doing some work for small earning)
 20. **Unemployed/in search of employment**
 98. **Did not tell**

B6. What is your religious identity?

1. Hindu
2. Muslim
3. Christian
4. Sikh
5. Buddhist
6. Jain
7. Parsi
8. Other religious identity (***please write down***) _____
9. Do not believe in religion/follow no religion

B7. What is your caste group – are you Scheduled Caste, Scheduled Tribe, OBC or General?

1. Scheduled Caste (SC)
2. Scheduled Tribe (ST)
3. Other backward classes (OBC)
4. General
98. No response

B7a. And what is your Caste/Jaati-biradari? (***Note down the response and then click on suitable option below***) _____

1. Brahmin
2. Rajput
3. Vaishya
4. Other Upper caste
5. Yadav
6. Other peasant OBC
7. Craftsmen OBC
8. Service OBC
9. Other OBC
10. Jatav
11. Other Dalit
12. Meena
13. Santhal
14. Munda
15. Other ST
16. Syed, Shaikh Muslim
17. OBC Muslim/Pasmanda Muslim
18. Others
98. No response

B8. Are you married?

1. Yes
2. Yes, Widowed/Widower
3. Yes, Separated
4. Yes but Divorced
5. No, unmarried/single
8. Did not answer

B9a. **(If 2.Town/ 3. Small City/4. Big City/5. Metropolis in A6)** What type of house does the respondent live in?

1. House/Flat/ Bungalow
2. House/Flat with 5 or more rooms
3. House/ Flat with 4 rooms
4. House/ Flat with 3 rooms
5. House with 2rooms
6. House with 1 room
7. Kuccha house
8. Slum/Jhuggi-Jhopdi cluster
99. NA

B9b. **(If 1. Village in A6)** What type of house does the respondent live in?

1. Pucca (both wall and roof are made of pucca material)
2. Pucca-kuccha (either wall or roof is made of pucca material, but others of kuccha material)
3. Kuccha (both wall and roof are made of kuccha material other than material mentioned in Category 4)
4. Hut (both wall and roof are made of grass, leaves, mud, un-brunt brick or bamboo)
99. NA

B10. How many adults (18+) and children (below 18) are there in your household? **(Note down exact number for each; Code 0 if no children)**

- a. Adult _____ 98. No response
- b. Children _____ 98. No response

B11. How many people in your household own these things? **(Please tell the respondent to include themselves in the count)**

- a. A Mobile phone?
_____ 0. None 98. Don't know/NR
- b. **(If answer is 1 to 15 in B11a)** And how many of them have a smartphone?
_____ 0. None 98. Don't know/NR 99. NA

B12. Does your household or any member of your household have/own these items?

	1. Yes	2. No	99. NA
a. Car/jeep/van	<input type="radio"/>	<input type="radio"/>	
b. Scooter / motorcycle/ moped	<input type="radio"/>	<input type="radio"/>	
c. Air conditioner	<input type="radio"/>	<input type="radio"/>	
d. Electric fan	<input type="radio"/>	<input type="radio"/>	
e. Cooler	<input type="radio"/>	<input type="radio"/>	
f. Washing machine	<input type="radio"/>	<input type="radio"/>	
g. Fridge	<input type="radio"/>	<input type="radio"/>	
h. Music system or transistor	<input type="radio"/>	<input type="radio"/>	
i. Bank account	<input type="radio"/>	<input type="radio"/>	
j. Credit card	<input type="radio"/>	<input type="radio"/>	
k. Toilet inside the house (or just next to the house that is exclusively your house's)	<input type="radio"/>	<input type="radio"/>	
l. (Ask only in a purely rural area) Pumping set	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
m. (Ask only in a purely rural area) Tractor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

B13. What's your **monthly household income** these days approximately - please tell me after adding the income of all members? **(First note down answer and then mark range option depending on answer)**

-
- 01. Upto 1,000
 - 02. 1,001 to 2,000
 - 03. 2,001 to 3,000
 - 04. 3,001 to 5,000
 - 05. 5,001 to 7,500
 - 06. 7,501 to 10,000
 - 07. 10,001 to 15,000
 - 08. 15,001 to 20,000
 - 09. 20,001 to 30,000
 - 10. 30,001 to 50,000
 - 11. Over 50,000
 - 98. No answer

Thank You for your time.

