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The Global News Challenge

Assessing changes in international broadcast news
consumption in Africa and South Asia.

Anne Geniets

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PREFACE

This report is the second stage of a three-phase project on 'International News Provision, Consumption and Trust in the 21st Century'. The project examines eight countries and aims to explore the increasingly competitive provision of news by international media, changing patterns of consumption and use of these providers, and the ways in which trust may be changing in a world of news abundance as opposed to news scarcity. Like the first stage of the project, this report examines eight countries, including six in three different language zones in Africa: Senegal and Cameroon, Kenya and Nigeria, and Algeria and Egypt; together with two countries in South Asia, India and Pakistan. The working paper of stage 1 of this project, 'Good News from a Far Country? Changes in international broadcast news supply in Africa and South Asia', by Dr Brian Rotheray, reported on changes in the *provision* of international news to the eight target countries. This was published in July 2010.

This working paper collates audience-research findings from some fieldwork carried out recently in Senegal, Kenya, Egypt and India, as well as existing statistical data made available by some broadcasters, to investigate international *news-consumption* habits in eight different countries. For each of the eight target markets and their unique historic, cultural, political and socio-demographic backgrounds, we aimed to identify through this study: news-access patterns, the dominant international providers, the role of international providers compared to domestic providers and any changes in media consumption habits over the past few years.

EXECUTIVE SUMMARY

This report is focused on the consumption of international news. It collates findings from fieldwork and from reports on audience figures from the BBC, France 24 and Voice of America, and, to a lesser degree, the descriptive analysis of data sets. It is important to note that the survey data was not consistent across the target countries and that many of the studies analysed do not have full national coverage. The analysis and presentation of these combined findings aim to provide an analysis of the status quo and outline contemporary changes in news consumption patterns across eight countries: Algeria, Egypt, Senegal, Cameroon, Kenya, Nigeria, India and Pakistan. The media landscape in Africa and South Asia has seen dramatic changes over the past few years, not least due to political, infrastructural and economic changes, which are reflected in changed news consumption patterns.

The report investigates news consumption in the eight target markets, and sketches out the increased influence of private domestic broadcasters as opposed to state-run or international broadcasters in the wake of increased media liberalisation in many African and South Asian countries. It explores three core questions for each market, namely: Who are the main providers in each country? How does consumption of news provided by international media outlets compare with the news from domestic providers? And, How have more recent news providers begun to influence the market? While for each market individual responses to these questions emerge, the findings also point to a number of factors common to all eight markets that keep consumers from accessing and using international broadcasters.

- *Algeria's* television and radio stations are state-controlled, but there is a lively private press, which often criticises the authorities. Satellite television is popular; stations based in France target viewers in Algeria. Algerians consume content from a mix of national and international providers. While more content from national providers is consumed on the radio, the television market seems to offer opportunities for international providers, particularly French and Arabic channels. On balance, national providers seem to be strong in the radio market, and former colonial (French) providers as well as pan-Arab regional and partly national providers traditionally seem to be strong in the television market in Algeria.
- Meanwhile, there are two state-run national television channels and six regional channels in *Egypt*, but many viewers turn to pan-Arab channels for their news. Egypt is a big force in satellite television. International providers such as the BBC, CNN or VOA are only consumed to a marginal degree by the general population, but much more frequently by opinion leaders. On balance, national providers seem to be strong in the radio market, and pan-Arab and national providers seem to be strong in the television market. Former colonial providers are viewed with some suspicion.
- In *Senegal*, radio is the most influential medium, at least in rural areas, and commercial and community stations have increased rapidly since the 1990s. Many people access RFI on the radio, which is very popular. In urban areas such as Dakar, private television is the most influential medium for current affairs. The most important and dominant providers are private channels, although international channels such as TV5 or France 24 enjoy popularity, too. Private domestic channels are very popular. It seems that these private channels provide a balance to the government-owned RTS channels, which are seen as the mouthpiece of the government by many.

- *Cameroon's* state-run CRTV operates national television and radio networks and provincial radio stations. State television's monopoly was broken with the arrival in 2001 of TV Max, Cameroon's first private television station. Radio Nationale CRTV encompasses a wide network of local and regional FM stations. Private radio stations compete strongly with CRTV at regional level. International radio stations and television channels are very popular, particularly French stations. On balance, due to tight regulations, state-run CRTV has a strong position in the market. International and pan-African television channels are highly popular; private domestic television channels, too, are highly popular but are struggling to survive. Private domestic radio stations provide stiff competition to the state-run CRTV radio network at a local and regional level, as do international and pan-African radio stations.
- *Kenya* enjoys a relatively free media environment. While international providers are seen by consumers as essential, as they offer an alternative, less biased view than the national private and state-owned media, the consumption of international media generally has gone down, particularly for radio. The steep increase of vernacular radio stations over the past few years in a context of limited media regulation and monitoring might contain the potential for fostering underlying ethnic tensions. International television providers are mainly used by the middle- and upper-classes as access is costly. While the television market is dominated by English and Kiswahili providers, the radio market is dominated by many vernacular stations, reflecting the ethnic and cultural diversity of Kenya. Regional providers are very strong and colonial providers are viewed with some scepticism.
- *Nigeria* has a vibrant and diverse media environment, but state control and tough legislation make it difficult for international broadcasters to compete with the many domestic broadcasters. The state-run NTA is the dominating force in the Nigerian media market, but private domestic broadcasters have become strong competitors over the past years. International providers like the BBC Hausa Service are trusted and very popular, but international broadcasters find it difficult to establish a presence on local partner stations. On balance, Nigeria is a competitive environment, with a strong and lively domestic media landscape. While state-run and private domestic providers both for radio and television are popular and successful, international broadcasters enjoy popularity, too, albeit to a lesser degree.
- *India* has a very lively and diverse, autonomous media market that makes it difficult for international broadcasters to tap into. While music-based FM stations are highly popular, only the public radio station All India Radio can broadcast news. Television is the most popular media in India, and private domestic television channels in both Hindi and English enjoy great popularity. However, the top channels with the widest reach are mostly Hindi news channels. The distinction between news and entertainment on most domestic channels is often blurred, and many consumers complain about the 'sensationalist' tone of some of the content of domestic providers. On balance, domestic private channels are the strongest providers in the market, both for television and for radio. International providers are seen as setting the gold standard for domestic providers by many, but are viewed with some scepticism.
- *Pakistan* has a very restricted media environment. Most people in urban areas watch private television channels such as Geo News or Express News, or watch the state-owned PTV channels (particularly PTV1) as opposed to international channels. Private FM radio stations have in the past few years started to broadcast a wider spectrum of opinions, but they are not allowed to broadcast their own news programmes. Since there are rarely cable television or

FM stations in rural areas, the need for reliable news not influenced by domestic pressures and sectarian tendencies persists. Meanwhile in urban areas, Pakistani media consumers are restricted by strict government rules and powerful broadcasting regulators who jeopardise their access to international broadcasters via local partner stations, as they can choose to take international radio stations or television channels off air on these stations whenever they like. This makes life difficult, both for international broadcasters operating in Pakistan via partner stations, and for Pakistani media consumers in need of free, accurate and reliable information in times of increased political tension and insecurity.

Several trends emerge from these individual developments that transcend the cultural and geo-political uniqueness of each market.

- The increase of local provision and the growth of competition from a range of new international and transnational providers stand out as the most significant developments that jeopardise the consumption of news from traditional international providers. Local provision is increasing in part because of the rise of commercial local providers, which are often seen as more reliable than state-controlled national providers.
- The report also confirms the findings of the earlier report, that international competition is increasing because of the rise of new international providers and increased efforts by some traditional international providers.
- Increased provision and choice mean that people across all the countries studied are regularly using multiple stations often on the same day. In highly competitive markets such as Egypt only a small minority (less than 10%) of those questioned reported only watching one television station the previous evening with over 50% watching more than three stations.
- At the consumption level there is very little evidence that the increased resources expended by international providers such as the Chinese are yet translating into sizeable audiences.
- However, the study shows that regional broadcasters are becoming increasingly important. In Egypt and Algeria pan-Arab satellite channels are very important players drawing large audiences. In Egypt in particular this places international broadcasters from outside the region, notably BBC Arabic and Al Hurra, at a disadvantage. However there are also signs of the popularity elsewhere in Africa of non-national regional broadcasters in several countries.
- The study further identifies an increasing shift in the consumption of news from 'official languages', such as Standard Arabic (Egypt), Swahili (Kenya) or English (India), to vernacular languages and dialects across the eight target markets.
- Mobile phones are used widely to listen to the radio in the eight markets, a trend that is set to increase further with the improved coverage of mobile phone networks.
- The growing availability of internet-capable mobile devices is likely to mean that internet access needs to be looked at differently in the future: the cost implications are not the same as with desktop internet and the growth of access will not necessarily follow the 'traditional' process of spreading in a linear fashion from urban to rural and from rich to poor.

- Internet-capable mobile devices are transforming news consumption, leading to consumers accessing bits of information across different platforms outside news hours and on-the-go, as well as consuming news from non-traditional providers such as Yahoo!, Google, YouTube or Facebook.
- New generations of media consumers growing up with internet and mobile phone technology readily available have different information needs and media behaviours from older media consumers. This has led to a generational shift in the consumption of news from different media platforms.

Far from disputing the purpose of international broadcasters, these findings confirm and emphasise the common need of consumers in the eight target countries for international broadcasters as benchmarks in peaceful times and as reliable resources for accurate information in times of crisis, but simultaneously outline the necessity for innovation and adaptation of traditional international providers to a changed environment.

ACKNOWLEDGMENTS

This report is the second part of a one-year independent study supported by the Carnegie Corporation of New York, BBC Global News and France 24.

The research presented here is a mixture between fieldwork findings in Senegal, Egypt, Kenya and India, and the presentation of in-house publications of Voice of America, BBC and France 24, as well as a small amount of statistical data analysis of data sets for India, Pakistan, Egypt, Senegal, Cameroon, Algeria, Kenya and Nigeria. The research was possible thanks to the assistance of BBC Audience Insight, BBG and France 24. The organisations provided three kinds of support. First, they made available specialist reports and expertise on the media environments of countries included in the study. Second, they provided in-house databases and reports of audience research of the eight target markets. Third, the BBC and France 24 made possible the fieldwork, which allowed additional insight into five of the markets studied. Particular thanks are due to Colin Wilding, Anne Barnsdale and Jeremy Nye of BBC Audience Insight, to Daniel Nobi and H  l  ne R  ze from France 24, and to William Bell of BBG for their guidance and useful discussions. Special thanks also to Ryan Halloran for his excellent statistical assistance.

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References to the material made available by BBC, France 24 and BBG and other broadcasters are given in footnotes. Other books and articles mentioned in the text are detailed in the References at the end of the report.

Anne Geniets

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1 Introduction

Moderator: Let's say you woke up one morning and all the international providers of news were gone. How would you feel?

Participant: You would feel as if you were half blind.

(Kenya, FGD 6, male participant, BC1, 18–34 years)

This report collates existing data, statistics and literature to investigate news consumption habits in the eight target countries of this comparative, cross-cultural study. The eight countries investigated are Algeria, Egypt, Senegal, Cameroon, Kenya, Nigeria, India and Pakistan. For each of these markets and their unique historic, cultural, political and socio-demographic context, we aimed to identify: news access patterns; the dominant international providers of each market; the role of international providers compared to domestic providers; and changes in media consumption habits over the past few years. The story told in this report is a tale of consumers in eight partially free media environments in Africa and South Asia, faced with an increasing selection and variety of news content brought to them by ever more international and domestic providers across a variety of media platforms. Unsurprisingly, each of the eight target markets has its own story, guided by political, social and cultural parameters conditioning the media consumption environment. But a number of themes emerged in the course of this analysis that seem to transcend the local and national contexts and to emerge as overarching, cross-cultural consumption trends. These trends are elaborated and presented in this report.

1.1 Purpose of the study

In economically dire times with restrictions on public investment in media, and in a climate of increased global competition between broadcasters, many international broadcasters have had to cope with falling audience figures and in some cases declining revenues too. *French External Broadcasting* (AEF) for example, which in 2009 had a total budget of €294.7 million (£256.4 million – US\$401.8 million) split into €133 million for *Radio France Internationale* (RFI, including *Monte Carlo Doualiya* (MCD)), €92 million for *France 24* and €70 million for *TV5*, saw audience figures for RFI alone dip by 11% between 2004 and 2008. Audience figures for RFI's Arabic

service, MCD, dropped by nearly 50% from 10.5 to 5 million between 2004 and 2009 (Parliamentary Hearing, Assemblée Nationale de la France, 10 February 2010¹). RFI's African market in 2008 accounted for approximately 72% of RFI's total audience² and has seen a promising increase in audience figures in 2009, with a market share increase in the Senegalese capital Dakar of 29% and in the Cameroonian cities of Yaoundé and Douala of 11% and 12% respectively (RFI Bilan 2009). Similarly, the BBC World Service reported a drop of 8 million listeners (from 188 million in 2009) in the service's global weekly audience, which seems mainly caused by the decline in short-wave listening in countries such as India and Bangladesh (*BBC World Service Annual Report*, 2010). Whether this is just a sign of a decline in radio audiences or rather an international trend of declining consumption from international broadcasters can be debated. But findings like these suggest that strategic decisions adopted by broadcasters to counter this downward trend need carefully to take into account who is watching and listening to these international providers, as well as the competitive strategies pursued by local and regional providers.

While such decisions are undoubtedly of concern for the media companies involved, the potential impact of these developments reach much further and could potentially have significant political implications. The importance of the contribution of both domestic and international media to the sustainability and strengthening of these democratic beginnings can therefore not be overestimated (see also Thompson, 2007). It is this political impact of current developments that constitutes the underlying rationale for this report. The next chapter therefore investigates media markets and audience figures across different platforms in two countries in, respectively, North Africa (Egypt and Algeria), Francophone Africa (Senegal and Cameroon), Anglophone Africa (Nigeria and Kenya), and South Asia (India and Pakistan), and examines in greater detail the consumption of news from international providers in these contexts. The analysis is guided by four research questions, outlined below.

¹ Assemblée Nationale de la France, Commission des affaires culturelles et de l'éducation, protocole de la séance de mercredi, 10 février 2010.

² 'Les chiffres clés de RFI', <http://www.rfi.fr/com/20100120-chiffres-cles-rfi>, (article published 20 January 2010, last modified 8 September 2010), accessed 27 September 2010.

1.2 Research questions

- (1) Who are the main providers in each country?
- (2) What is the role of international providers (compared to domestic providers) in each market?
- (3) What are the factors that drive or jeopardise the consumer demand for news from international providers in these countries, for both old and new media?
- (4) Is the way in which people access the news changing (from radio, to television, to mobile phones, to the internet)? Are these 'shifts' leading to new kinds of providers being used?

1.3 Methodology

The report is based on four different sources. It combines findings from fieldwork carried out in July and August 2010 in Senegal, Egypt, Kenya and India; internal reports on audience figures from the BBC, France 24 and Voice of America; the preliminary basic statistical analysis of data; and academic literature. Concerning the statistical data analysis, it is important to note that the survey data analysed for this purpose was rarely representative and was not consistent across the target countries. A descriptive approach was chosen to analyse the data, which kindly has been provided by numerous institutions, including the Voice of America, the BBC and France 24. Because of the wide variety of sources, each data set was unique in terms of variables and sample size. Details of the ownership and the size of the data sets analysed can be found in the Appendix. Due to the multiple data sources and the restricted time available, it was not possible to compare the media consumption of individual countries over time, nor was the comparison of data possible across all countries. Weights were used in some cases, but not all. Consequently, the findings are snapshots of the media habits of the individual data samples and need to be interpreted accordingly.

A few caveats need to be mentioned before embarking on this analysis. As Amin (2008) has outlined with regard to the Arab media world, media audience research is very often accompanied by a variety of constraints and impediments. The first factor that needs to be taken into account when reporting and studying audience research figures is the constant fluctuation of the size of the population in each country. Second, many of the markets investigated in this report are set in authoritarian government contexts in which strict control and governmental distrust of the mobilising power of mass media have jeopardised the development of audience

research. Third, due to these restrictions, as well as corruption, secondary data is often difficult to obtain and there is often little reliable up-to-date data available. Finally, this report was written within a very tight timeframe, given the volume of the data and the number of countries investigated, and therefore ought to be understood as part of an ongoing investigation into media consumption internationally.

Given these caveats, this report reflects my interpretation of the literature, figures and data available at this point in time, as well as some of the insights, impressions and anecdotal evidence gained during the qualitative fieldwork for the third research phase of this project.

1.4 Structure of the report

The report is divided into five parts. Following this introduction, Chapter 2 introduces the individual market contexts and their backgrounds (freedom of media, infrastructure, etc.), sketching out the diverse media environments across the eight countries. Chapter 3 outlines media consumption figures for the awareness and usage of national and international providers in each country. Chapter 4 presents new media developments in these contexts. Finally, Chapter 5 synthesises the findings and concludes by mapping out challenges and opportunities for each market.

2 Background

2.1 Overview

The domestic media landscapes in all of the eight target markets have changed considerably over the past decade or two. These changes are on the one hand due to political and economic changes in these countries, which, implicitly or explicitly, have had an impact on the openness of the domestic media landscape and have influenced the liberty of the respective media markets and have opened the space for more competition and greater choice for domestic audiences. This is reflected in the significant increase over the past few years in the number of international broadcasters as well as private domestic suppliers that can be observed in all of the eight target countries (for more details see the first report on this project). On the other hand, these changes seem to be driven by technological progress that has accelerated the growth both of alternative and 'mainstream' media, resulting in an increased level of transparency and interactivity for domestic audiences.

2.2 Market contexts

The eight markets investigated are all different in terms of their history, politics, cultures, language and religions. Unsurprisingly, this diversity is reflected in the different media environments. Wide variations exist between the target countries in terms of the freedom of the media environment, ranging from a 'partly free' press freedom score of 33 points in India, to a score of 66 points, classified as 'not free', for Cameroon.³ These and other differences between the countries are outlined in the following country comparison table.

³ Freedom of the Press, Freedom House, <http://www.freedomhouse.org/template.cfm?page=251&year=2010>, accessed 19 October 2010. Three aspects of each country are analysed for the Freedom House Press Freedom Index: the economic environment of the press = 0-30; the political environment of the press = 0-40; and, the legal environment of the press = 0-30 points. The sum of these three aspects adds up to a total score for each country, that indicates the degree of press freedom in each country: scores 0-30 = free; scores 31-60 = partly free; scores 61-100 = not free.

	<i>Algeria</i>	<i>Egypt</i>	<i>Cameroon</i>	<i>Senegal</i>	<i>Kenya</i>	<i>Nigeria</i>	<i>India</i>	<i>Pakistan</i>
Freedom of press ¹	Not free, 64	Partly free, 60	Not free, 66	Partly free, 57	Partly free, 57	Partly free, 54	Partly free, 33	Not free, 61
<i>Economic, social and political context</i>								
Population (total in m.) ²	34.9	83	19.5	12.5	39.8	154.7	1200	180.8
GNI per capita (in \$) ³	4260	1800	1150	970	770	1160	1070	980
Adult literacy rate (% of ages 15 and older, total population) ⁴	69.9	71.4	67.9	39.3	85.1	68	61	49.9
Gross primary, secondary, tertiary school enrolment (%) ⁵	74	70	57	44	59	51	63	42
Urban population (% of total) ⁶	65	43	57	42	22	48	29	36

Sources:

¹ Freedom of the Press, Freedom House, <http://www.freedomhouse.org/template.cfm?page=251&year=2010>, accessed 19 October 2010.

² UN data of 2009, as derived from BBC Monitoring country profile, http://news.bbc.co.uk/1/hi/country_profiles/default.stm, accessed 18 August 2010.

³ Worldbank data 2008, as derived from BBC Monitoring country profile, http://news.bbc.co.uk/1/hi/country_profiles/default.stm, accessed 18 August 2010.

⁴ CIA World Factbook, <https://www.cia.gov/library/publications/the-world-factbook/geos/ag.html> accessed 18 August 2010.

⁵ Data from ICT statistics of the Worldbank as of 2008, <http://web.worldbank.org/WBSITE/EXTERNAL/DATASTATISTIC/0,,contentMDK:20487483~menuPK:64909262~pagePK:64909151~piPK:64909148~theSitePK:6950074~isCURL:Y,00.html> accessed 11 May 2010. Numbers in *italics* specify years other than 2008.

⁶ CIA World Factbook, <https://www.cia.gov/library/publications/the-world-factbook/geos/ag.html> accessed 18 August 2010.

Table 2.1: Country comparison by economic, social and political context.

As the table above illustrates, all countries have in common a comparatively low GNI per capita, restricted freedom of the media, and relatively low levels of literacy (with the exception of Kenya), with adult literacy ranging from 39.3% in Senegal to 85.1% in Kenya.

2.3 Importance of media

While print media have a strong tradition in all eight target markets, broadcast media typically take precedence over print in most of the countries. This is at least partly due to continuing low levels of literacy that keep having an impact on already declining circulation figures for the print press – with the exception of India, where a growing middle class has led to a rise in newspaper circulation (BBC Monitoring, 2010⁴). Radio and television are by far the most frequently accessed media for news

⁴ BBC Monitoring, ‘India Country Profile’, http://news.bbc.co.uk/1/hi/world/south_asia/country_profiles/1154019.stm#media 7 June 2010, accessed 20 August 2010.

in both Africa and South Asia. The following table gives a comparison between the eight countries. However, these figures are indicative and may not be identical to figures mentioned later in the text, which are based on different and more detailed data sources for each country.

Table 2.2: Country comparison by communications- and media-sector performance.

	<i>Algeria</i>	<i>Egypt</i>	<i>Cameroon</i>	<i>Senegal</i>	<i>Kenya</i>	<i>Nigeria</i>	<i>India</i>	<i>Pakistan</i>
<i>Sector performance</i> ¹								
Telephone lines (per 100 people) ²	7.3	12.4	1.6	2.2	1.6	0.9	3.0	2.2
Mobile phone subscriptions (per 100 people) ²	93.7	66.6	37.8	55.0	48.6	47.2	43.8	56.9
Personal computers (per 100 people)	1.1	3.9	1.1	2.2	1.4	0.9	3.3	x
Households with a television set (%)	91	97	23	43	19	25	46	56
Number of TV broadcast stations ³	state-run Radio-Télévision Algérienne operates the broadcast media and carries programming in Arabic, Berber dialects, and French	mix of state-run and private broadcast media; state-run TV operates 2 national and 6 regional terrestrial networks as well as a few satellite channels; about 20 private satellite channels and a large number of Arabic satellite channels are available via subscription (2008)	state-owned Cameroon Radio Television (CRTV), broadcasting on both a television and radio network; since August 2007, when the government issued licences, 2 private TV broadcasters	state-run Radiodiffusion Télévision Sénégalaise (RTS) operates 2 TV stations; several private channels available (BBC Monitoring, 2010)	about a half-dozen privately owned TV stations and a state-owned television broadcaster that operates 2 channels; satellite and cable TV subscription services are available	nearly 70 federal government-controlled national and regional TV stations; all 36 states operate TV stations; several private TV stations operational; cable and satellite TV subscription services are available	Doordarshan, India's public TV network, operates about 20 services; large number of privately-owned TV stations	1 dominant state-owned TV broadcaster, Pakistan Television Corporation (PTV), operates a network consisting of 6 channels; private TV broadcasters are permitted and some foreign satellite channels are carried by cable TV operators
Number of radio broadcast stations ³	state-run radio operates several national networks and roughly 40 regional radio stations	state-run radio operates about 70 stations belonging to 8 networks; 2 privately owned radio stations operational (2008)	State-owned radio network; since August 2007, one licensed private radio broadcaster; about 70 privately owned unlicensed radio stations operating but are subject to closure at any time; foreign news services required to partner with state-owned national station	RTS operates a national radio network and a number of regional FM stations; large number of community and private-broadcast radio stations	state-owned radio broadcaster operates 2 national radio channels and provides regional and local radio services in multiple languages; a large number of private radio broadcasters, including provincial stations broadcasting in local languages; transmissions of several international broadcasters are available	network of federal government-controlled national, regional, and state radio stations; roughly 40 state government-owned radio stations typically carry their own programmes except for news broadcasts; about 20 private radio stations also operate; transmissions of international broadcasters are available	government controls AM radio with All India Radio operating domestic and external networks; news broadcasts via radio are limited to the All India Radio Network; since 2000, privately owned FM stations are permitted but limited to broadcasting entertainment and educational content	the state-owned radio network operates more than 40 stations; privately owned radio stations mostly limit programming to music and talk shows
Mobile phone usage (minutes/user/month)	147	144	x	x	52	x	440	164
Internet users (per 100 people) ²	13.4	20.0	3.8	7.3	10	28.4	5.1	11.2
% of pop. covered by mobile-net	82	95	58	85	83	83	61	90

¹ Data from ICT statistics of the Worldbank as of 2008, <http://web.worldbank.org/WBSITE/EXTERNAL/DATASTATISTIC/0,,contentMDK:20487483~menuPK:64909262~pagePK:64909151~piPK:64909148~theSitePK:6950074-isCURL:Y,00.html> accessed 11 May 2010. Numbers in *italics* specify years other than 2008.

² Data as of 2009, United Nations Information Economy Report 2010 (launched 14 October 2010), Geneva, United Nations Publication, p.128cc.

³ Data as of 2007 (except for Egypt (as of 2008)), CIA World Factbook, <https://www.cia.gov/library/publications/the-world-factbook/>, accessed 14 September 2010.

Sizeable differences exist between the individual media markets. Figures for television broadcast stations range from hundreds of stations in India to three stations in Cameroon. Internet penetration with 28.9% of the population is at its highest in Nigeria, and with 3.9% the lowest in Cameroon. Most users across the eight countries rely on dial-up connections and cybercafés to access the internet. Mobile phone subscriptions are considerably higher, and have in countries like Algeria, where mobile phone subscription is at 92.7%, almost reached saturation point. The most widespread trend across all the eight countries is the increasing importance of television and mobile phones:

- *Algeria*

In Algeria, most people watch television. Satellite television is highly popular, and stations based in France specifically target viewers in Algeria. European channels such as Euronews are widely watched (BBC Monitoring, 2010⁵). Television is the dominant source for news and current affairs. As has been outlined in Report 1 (Rotheray, 2010), television in Algeria offers a route to wider perspectives on international affairs: Over 90% of homes have televisions, and according to research from France 24 with 451 heads of households, of those households with television, each household owns on average 1.9 televisions; 99% of these households access satellite television channels through an individual parabolic antenna (half of them through an automatically adjustable antenna, half of them through a fixed antenna). Overwhelmingly, the respondents indicated that they would receive television programmes via the satellites Nilesat (96%) and/or Hotbird (51%) (France 24, 2009).

- *Egypt*

Similarly, in Egypt, television is the most popular source for news (BBC Monitoring, 2010⁶), but radio is listened to in rural areas and poor neighbourhoods where television reception is limited. As in Algeria, satellite television is highly popular. One of the explanations for the steep increase in the consumption of satellite television content in countries like Egypt and Algeria since the launch of the first satellite television channel in 1991 (the Egyptian Space Channel, ESC), could be the fact that satellite dishes and receivers have become affordable for the vast majority in the Arab world, and particularly in Egypt, the most populated Arab country. Today, second-hand satellite dishes in Egypt can be purchased for as little as US\$15. There

⁵ BBC Monitoring, 'Algeria Country Profile', http://news.bbc.co.uk/1/hi/world/middle_east/country_profiles/790556.stm, 28 July 2010, accessed 18 August 2010.

⁶ BBC Monitoring, 'Egypt Country Profile', http://news.bbc.co.uk/1/hi/world/middle_east/country_profiles/737642.stm, 7 June 2010, accessed 18 August 2010.

were only perhaps 50 dishes in all of Egypt in 1990 compared to several million today (El-Sayed, 2009). However, the number of those viewers who have access to satellite channels is much bigger than the number of dishes available for households, for in the poor neighbourhoods and villages of Egypt and other countries investigated in this study, such as Kenya or Senegal, video pirates download satellite signals and retransmit by cable systems to clusters of buildings or even entire neighbourhoods, at fees that undercut the costs of dishes and satellite receivers, and in many cases, pay-TV charges (El-Sayed, 2009). According to El-Sayed (2009), in Egypt pirates offer packages that include pay-TV stations like Orbit and ART network channels and free stations like the news channel Al Jazeera.

- *Senegal*

In other parts of Africa, like Senegal, radio is the most influential medium, particularly in rural areas. FM delivery is dominant, but short-wave still delivers a significant range of radio listening. Television is widely watched in urban areas, particularly domestic media, both private and government owned. Most of the international news providers are accessible through subscription. Following information gathered during our fieldwork in Dakar, it seems that in Senegal mainly three media subscription companies are competing in this sector: Canal+Horizons, Excaf Telecom and Delta Net TV. The French company Canal+Horizons will put a subscriber in touch with a local dish installer and currently offers five levels of subscription to largely Francophone viewing and listening – ranging from 39 channels at the entry level to 72 at the top level (plus sport, film and family viewing packages) (Rotheray, 2010). In 2006, rates were relatively expensive, ranging from US\$ 16 to US\$ 58 a month in a country where the average income is under US\$80 a month (Rotheray, 2010). Due to the level of the monthly subscription payments, the average Senegalese regards it as a luxury to subscribe to such bouquets and to consume news from international broadcasters. However, many Senegalese television consumers use similar (illegal) techniques to the ones outlined for the Egyptian media market, to avoid the subscription and consume pay-TV at a fraction of the cost for a full subscription.

- *Cameroon*

Meanwhile, in Cameroon, which has a very restricted media environment, newspapers are the public's main source of news, but are subject to considerable official restrictions.⁷ People also listen to the radio for news and watch television,

⁷ BBC Monitoring, 'Cameroon Country Profile', http://news.bbc.co.uk/1/hi/world/africa/country_profiles/1042937.stm, 12 August 2010, accessed 20 August 2010.

particularly in urban areas. Radio is more widely available than television and short-wave still delivers a significant range of radio listening to the area. FM delivery is dominant, however. According to Rotheray (2010), of the 23% of households with television sets in 2004, around a third of them are subscribing to pay-TV channels.

- *Nigeria*

Radio is the key source of news and information in Nigeria, where state-run radio and television have near-national coverage and operate at federal and regional levels. Private television and radio providers are highly popular. Television viewing is concentrated in urban areas (BBC Monitoring, 2010⁸).

- *Kenya*

In Kenya, most citizens rely on radio for the news, particularly in rural areas (TNS Nairobi, Fieldwork report). Nearly all households have a radio set. In cities such as Nairobi, television is often the dominant source of news, though many consumers indicated in our fieldwork that they listened to the radio on their mobile phones or would listen to the radio that was switched on in the matatu (public transport) on their way to work in the morning. Television ownership is on the rise, around 40% today, up from just 15% in 2000 (Rotheray, 2010).

- *India*

Television and radio are the most widely used media in India for news. Indian broadcasting has flourished since state television's monopoly was broken in 1992, and the number of channels is still growing. Private cable and satellite stations draw large audiences. Multichannel, direct-to-home (DTH) television has been a huge hit. Five operators – Dish TV, Tata-Sky, Sun Direct, Big TV and Airtel Digital TV – have attracted millions of subscribers. State-owned Doordarshan Direct offers a free-to-air DTH service. The cable television market is one of the world's largest (BBC Monitoring, 2010⁹).

- *Pakistan*

Finally, in Pakistan, television is the dominant medium. More households own television sets than radios. There are around 50 private channels. The overwhelming

⁸ BBC Monitoring, 'Nigeria Country Profile', http://news.bbc.co.uk/1/hi/world/africa/country_profiles/1064557.stm#media, 6 May 2010, accessed 20 August 2010.

⁹ BBC Monitoring, 'India Country Profile', http://news.bbc.co.uk/1/hi/world/south_asia/country_profiles/1154019.stm#media 7 June 2010, accessed 20 August 2010.

majority of viewers receive them via cable. There are no private, terrestrial stations (BBC Monitoring, 2010¹⁰).

Among these individual differences in media consumption between the media markets, the most common feature that these markets share is that of a 'hostile' media infrastructure environment, which affects most of the media consumers and jeopardises their media consumption. This means that, besides a limited freedom of the press in all of the eight target markets, consumers also frequently have to deal with electricity outages (as increasingly happening in Senegal¹¹), bad signal reception (particularly in rural areas), slow or overloaded internet connections¹² and costly access. Such challenges, together with unconventional (illegal) ways of media consumption of poorer media consumers, as outlined above, are often not accounted for in traditional audience research.

2.4 Media environment dynamics

Widespread deregulation and loosening of government controls have contributed to the improvement and the growth of the domestic media sectors in all of the eight countries, leading to new local and national radio stations and television channels that are freer from government control. This inevitably has led to an increase of locally produced media content. Yet, this relative independence of domestic media, compared to previous decades, did not evolve without struggle.

- *Algeria*

Algeria's television and radio stations are state controlled, but there is a lively private press which often criticises the authorities. Satellite television is highly popular, and many Algerians consume television content broadcast from France. But press freedom remains fragile, making life difficult for private domestic broadcasters. Although the constitution guarantees freedom of expression, the 1992 state of emergency has remained in effect throughout 2008, allowing the government

¹⁰ BBC Monitoring, 'Pakistan Country Profile', http://news.bbc.co.uk/1/hi/world/south_asia/country_profiles/1157960.stm#media, 18 August 2010, accessed 20 August 2010.

¹¹ Radio France International, 'Senegalese opposition protest against government and power cuts', 14 August 2010, <http://www.english.rfi.fr/africa/20100814-senegalese-opposition-protests-against-electricity-cuts-and-government>, accessed 18 August 2010.

¹² As recently happened in Kenya (particularly in Nairobi), where a fault on the new fibre optic undersea cable left scores of businesses and individuals with unstable internet connections for weeks (<http://www.bbc.co.uk/news/10581602>, accessed 18 August 2010).

legally to penalise any speech perceived as threatening the state or public order (Freedom House, 2009, International Federation of Journalists, 2008^{13 14}), affecting many private radio and television stations: For example, in March this year, the government blocked the websites of the independent and government critical radio station Radio Kalima-Algérie and simultaneously, Eutelsat stopped carrying the station's broadcasts on its Hotbird satellite (International Federation of Journalists, 2010¹⁵). The national television service ENTV (Entreprise nationale de Télévision) carries programmes in Arabic, Berber and French, transmitted terrestrially and via satellite. It is run and controlled by the state. Language is a significant factor in Algerian broadcasting. Berbers preserved some of their language and culture from Arab influence and make up a third of the population. Both, Berber and Arabic are heavily mixed with French, which has been the dominant language of the local elite.

As has been outlined in detail in Report 1 (Rotheray, 2010), Algeria uses satellite broadcasting internally and externally. Algeria's Chaîne 3 (Al-Thalithah TV) is a state-controlled entertainment and news channel which broadcasts to the Arab world and Africa and is watched at home. State-controlled Canal Algérie broadcasts to viewers in the Americas, Europe and Africa, and is popular in Algeria. A range of commercial and state-financed international broadcasters are available via satellite free-to-air within Algeria to those with the right equipment installed. These include: France 24, TV5 Monde, and Euronews as well as a range of pan-Arab services like Al Jazeera, Al Arabiya and others. French domestic channels like the private TF1 have been popular in Algeria (Rotheray, 2010). Berbère TV, based in Paris and launched in 1999, broadcasts in Berber and French, and targets audiences in France and North Africa. The same group also produces Berber radio programmes, which can be accessed via internet and satellite. Greater range is offered through pay-TV services such as the French company Canal+, but at a cost many are not able or willing to pay (Rotheray, 2010).

Radio is also state controlled and though less dominant, is more localised: Algeria's National Radio Company, Entreprise nationale de radiodiffusion sonore (ENRS), comprises national channels in Arabic, Berber and French, and 40 regional stations

¹³ Freedom of the Press, Freedom House, 'Algeria 2009', <http://www.freedomhouse.org/template.cfm?page=251&year=2009>, accessed 19 August 2010.

¹⁴ International Federation of Journalists (IFJ), 'CAPSULE REPORT: Press Freedom still fragile; IFJ urges decriminalisation of press offences, release from prison of media employees', 9 June 2008, http://www.ifex.org/algeria/2008/06/09/capsule_report_press_freedom_still/, accessed 19 August 2010.

¹⁵ International Federation of Journalists (IFJ), 'Independent radio station's website blocked', 25 March 2010, http://www.ifex.org/algeria/2010/03/25/radio_station_blocked/ accessed 19 August 2010.

(CIA World Factbook, 2010¹⁶). Some international and regional radio stations are available via satellite free-to-air or via subscription. No international radio channels are available locally on FM. Radio France Internationale uses short-wave as one of its platforms for the region. Other major state broadcasters also short-wave for Arabic and French transmissions to the region, including US Radio Sawa, BBC World Service, Deutsche Welle, Radio China International. Some of these services have audiences in Algeria (Rotheray, 2010).

- *Egypt*

Meanwhile, in Egypt, private provision is also relatively recent, with El-Mehwar and Dream starting to broadcast only in 2001. There are two state-run national televisions and six regional channels (CIA World Factbook, 2010¹⁷). State radio's monopoly was broken with the arrival of private music stations in 2003 (BBC Monitoring, 2010¹⁸), which today are highly popular and have gained wide audiences. However, private media are working at their own risk, and criminal charges have repeatedly been brought against journalists for political reasons, facilitated through an emergency law in force since 1981, that gives authorities the power to make arrests and detentions without court supervision (Freedom House, 2009¹⁹). Domestic private channels and stations, together with pan-Arab satellite television channels are highly popular among Egyptian audiences.

As has been outlined in Report 1 of this project, Egypt is a key media player in the Middle East. The most populous Arab country, it is the region's largest single national media market (BBC Monitoring, 2010²⁰). Egypt's state television, Egyptian Radio and Television Union (ERTU), established in 1960, has changed in recent years to meet competition from pan-Arab networks. There is a blurred line between Egypt's own domestic and external services. Nile Thematic TV (also state owned) was established in 1998 to win back audiences. It has 12 channels, including the

¹⁶ Data as of 2007, CIA World Factbook, <https://www.cia.gov/library/publications/the-world-factbook/geos/ag.html>, accessed 14 September 2010.

¹⁷ Data as of 2008, CIA World Factbook, 'Egypt', <https://www.cia.gov/library/publications/the-world-factbook/geos/eg.html>, accessed 14 September 2010.

¹⁸ BBC Monitoring, 'Egypt Country Profile', http://news.bbc.co.uk/1/hi/world/middle_east/country_profiles/737642.stm, 7 June 2010, accessed 18 August 2010.

¹⁹ Freedom of the Press, Freedom House, 'Egypt 2009', <http://www.freedomhouse.org/template.cfm?page=251&year=2009>, accessed 19 August 2010.

²⁰ BBC Monitoring, 'Egypt Country Profile', http://news.bbc.co.uk/1/hi/world/middle_east/country_profiles/737642.stm, 7 June 2010, accessed 18 August 2010.

Arabic-language Nile News channel (Rotheray, 2010). Private satellite television channels emerged after the government established a free media zone (the Media Production City) in 1997 (Rotheray, 2010). Free-to-air El-Mehwar TV and Dream TV both carry topical talk shows. There are a number of free-to-air religious channels. Muslim channels include: Al-Nas TV, Al-Rahmah TV and Azhari TV. Christian channels Aghapy TV and CTV are run by the Coptic Orthodox Church. A wide array of Arabic-language channels, such as Al Jazeera and Al Arabiya, together with Western channels like BBC Arabic, the US Al-Hurra, and CNN, as well as Euronews and France 24, are available to viewers via satellites covering the region, which include Arabsat, Nilesat and Intelsat. Most leading Arab pay-TV networks are based at the Media Production City in Cairo. Among them are Orbit, Arab Radio and Television (ART), Showtime and Star Select, each having a package of mostly non-Arabic channels, consisting of films, sports, soaps and news (Rotheray, 2010).

Though private stations are now allowed, overall Egyptian radio has seen little change in recent years. Short-wave still delivers a significant range of radio listening to the area and major state broadcasters targeting the area via medium and short-wave in Arabic include US Radio Sawa, BBC World Service, Deutsche Welle, Voice of Russia, Radio China International and Radio Monte Carlo. Some international radios are available via satellite (free-to-air or via subscription). No international radio channels are available locally on FM (Rotheray, 2010).

- *Senegal*

Senegal enjoys a relatively unrestricted media environment, although Freedom House has identified a steady decline in media freedom over the past few years, marked by increasing cases of imprisonment and physical attacks against journalists and media houses (Freedom House, 2009²¹). Commercial and community radio stations have increased rapidly since the 1990s, and a number of popular, outspoken private television channels exist today. The state-run national broadcaster RTS (Radiodiffusion Télévision Sénégalaise) operates RTS1 and RTS2, and is widely perceived, along with state-run broadcasters in other countries such as Kenya, as a mouthpiece of the government. As outlined in Report 1 (Rotheray, 2010), the private free-to-air 2STV service, established in 2003, is available in and around Dakar. The Walfradji media house runs a national daily, commercial radio and a popular television service, Walf TV. A range of commercial and state-financed international broadcasters are available via satellite free-to-air within Senegal (Rotheray, 2010). RFI uses short-wave as one of its platforms for the region. Some international radio

²¹ Freedom of the Press, Freedom House, 'Senegal 2009', <http://www.freedomhouse.org/template.cfm?page=251&year=2009>, accessed 19 August 2010.

channels are available on FM in the capital – including BBC World Service (105.6 MHz). Radio France Internationale is available via FM in numerous urban areas in addition to Dakar and launched two new relays in January 2010 (Rotheray, 2010).

- *Cameroon*

Cameroon is characterised by exceptional social and ethnic diversity, with more than 250 ethnic groups now forming five major regional-culture groupings (Mbaku, 2005). The government tightly controls the broadcast media and the media environment is widely rated as not free (Freedom House, 2009²²; Reporters Without Borders, 2009²³). State-run CRTV (Cameroon Radio and Television), which was established in 1985, operates national television and radio networks and provincial radio stations (BBC Monitoring, 2010²⁴). CRTV is part of the Ministry of Communication. It owns a network of ten provincial, one national and four commercial FM radio stations and a national television station in Yaoundé (Mbaku, 2005, Wikipedia 2010²⁵). The only national free-to-air television broadcaster is CRTV. The development of satellite broadcasting at national level since 2001 has improved CRTV availability (Rotheray, 2010). State television's monopoly was broken with the arrival in 2001 of TV Max, Cameroon's first private television station (BBC Monitoring, 2010²⁶). Operators like Canal2, STV1 and STV2 are also available nationally, but on a subscription basis via satellite. The French agency CFI supports CRTV through supply of programme content (Rotheray, 2010).

An assessment made in 2005 described private television as having a less diversified range of programmes than CRTV (Rotheray, 2010). Foreign broadcasters operate within Cameroon and are accessible to Cameroonians who can afford the equipment. An African perspective is provided by Africa No. 1 and Africable. International broadcasters include RFI, France 24, BBC World Service, BBC Arabic and TV5 Monde. Also offered are the French public-service channels TFI and France 2

²² Freedom of the Press, Freedom House, 'Cameroon 2009', <http://www.freedomhouse.org/template.cfm?page=251&country=7580&year=2009>, accessed 7 June 2010.

²³ Reporters Without Borders Press Freedom Index for Cameroon (2009), <http://en.rsf.org/press-freedom-index-2009,1001.html>, accessed 7 June 2010.

²⁴ BBC Monitoring, 'Cameroon Country Profile', http://news.bbc.co.uk/1/hi/world/africa/country_profiles/1042937.stm#media 12 August 2010, accessed 20 August 2010.

²⁵ Wikipedia 'Médias au Cameroon', http://fr.wikipedia.org/wiki/M%C3%A9dias_au_Cameroon, accessed 7 June 2010.

²⁶ BBC Monitoring, 'Cameroon Country Profile', http://news.bbc.co.uk/1/hi/world/africa/country_profiles/1042937.stm#media 12 August 2010, accessed 20 August 2010.

which with the private cable news LCI offer a different French domestic perspective. However, CNN and Al Jazeera are not present (Rotheray, 2010).

Dozens of private radio stations sprang up following a liberalisation of telecommunications in 2000 (BBC Monitoring, 2010²⁷). In 2007, the first private radio licences were granted, though today approximately 70 privately owned radio stations operate outside the law because of high licensing fees (Freedom House, 2009²⁸). Today, private radios compete strongly with CRTV at regional level. According to Rotheray (2010), non-profit community stations totalled 31 in 2005 (half of them supported by UNESCO). Major state broadcasters targeting the area via short-wave in English and French include Voice of America, BBC World Service, Deutsche Welle and Radio France Internationale. Some international stations are available via satellite free-to-air or via subscription, some are available on FM (Rotheray, 2010). Radio France Internationale works hard to be available via FM in numerous urban areas. BBC programming in English, French and Hausa is available across much of the country via FM relays. RFI recently started a news service to Orange mobiles in the country (Rotheray, 2010). In February 2008 authorities cracked down on private broadcast media as riots broke out in response to the government's decision to amend the constitution to allow President Paul Biya, who has been in power since 1982, to run for re-election in 2011 (Freedom House, 2009²⁹).

- *Kenya*

Kenya has enjoyed a more diverse and liberalised media scene than many other African countries since independence. But the growth in provision is a relatively recent phenomenon and, until recently, the liberalisation of broadcasting had a limited impact outside Nairobi. However, some private networks today have near-national coverage. Free-to-air terrestrial stations dominate the television landscape, and pay-TV, due to high costs, has a limited audience (BBC Monitoring, 2010³⁰). In recent years, private vernacular stations that broadcast in the languages of the local tribes (thus other than Swahili and English) have mushroomed across the country

²⁷ BBC Monitoring, 'Cameroon Country Profile', http://news.bbc.co.uk/1/hi/world/africa/country_profiles/1042937.stm#media 12 August 2010, accessed 20 August 2010.

²⁸ Freedom House Press Freedom Index for Cameroon (2009), <http://www.freedomhouse.org/template.cfm?page=251&country=7580&year=2009>, accessed 7 June 2010.

²⁹ Freedom House Press Freedom Index for Cameroon (2009), <http://www.freedomhouse.org/template.cfm?page=251&country=7580&year=2009>, accessed 7 June 2010.

³⁰ BBC Monitoring, 'Kenya Country Profile', http://news.bbc.co.uk/1/hi/world/africa/country_profiles/1024563.stm#media, 7 August 2010, accessed 20 August 2010.

and have gained increasing popularity among Kenyans, judging by comments made in our focus groups during our fieldwork in Kenya. As Rotheray (2010) has outlined, there has been growth in stations broadcasting in local languages and targeting the six main ethnic communities: Kikuyus (central Kenya), Luos (west), Luhyas (west), Kalenjins (northwest), Kambas (southeast) and Kisiis (southwest).

Most radio outlets are privately owned (Rotheray, 2010). Station styles are often informal and free-wheeling. State-owned Kenya Broadcasting Corporation (KBC) operates national channels in Swahili and English and local services in 15 languages. KBC news gives prominence to government activities and its style is traditional. Capital FM was the first privately owned station. Others include popular music radio Kiss 100 FM; Radio Citizen targets rural listeners; Umoja FM played a significant role in 2007 as a pro-opposition station (Rotheray, 2010). Free-to-air stations feature local news alongside imported programmes. Some carry reports from international broadcasters, including the BBC. FM is the most popular form of radio, but a third of listeners still use short-wave. International broadcasters, including the BBC, are available via local relays (Rotheray, 2010). There is a long tradition of listening to foreign radio stations in Kenya, where the BBC World Service enjoys a good reputation. The Chinese have added to their short-wave transmissions by establishing an FM presence in Nairobi and their audiences are higher than elsewhere in Africa. Full-time FM relays of the BBC World Service are on the air in Nairobi (93.9), Mombasa (93.9) and Kisumu (88.1), and some BBC programmes are also rebroadcast by private Kameme FM. The Voice of America has an FM relay in Nairobi and Radio France Internationale is relayed on FM in Mombasa (Rotheray, 2010).

Regarding television, key broadcasters include state-owned KBC Television, whose Channel 1 covers most of the country. It carries more home-made material than private rivals. KBC Channel 2 targets urban viewers with entertainment-based formats. In 1990, Kenya Television Network (KTN) became the first station to break the state monopoly. Its style contrasts strongly with KBC's output, but much of the country is out of range of its signal (Rotheray, 2010). Other services include NTV, run by Nation Media, and Citizen TV. Satellite television is out of the financial reach of many Kenyans and cable availability is limited. STV/TV and the South African satellite service MultiChoice are pay-TV platforms. The latter offers around 40 international channels. CTN is a cable pay-TV operator aimed at the affluent in Nairobi. Pan-regional East African TV operates from Tanzania (Rotheray, 2010). Mobile phones and texting have greatly added to the popularity and liveliness of phone-ins. Access to international television is limited and costly. However, the choice of viewing in the region is substantial, and though a large proportion of the

services are in Arabic, Kenyan viewers can receive many of the international channels available over the Asian sub-continent.

- *Nigeria*

In Nigeria, international broadcasters are popular. However, significantly for international broadcasters, rebroadcasting of news and current affairs by local partners was banned in 2004. This means that international broadcasters are reliant on short-wave. Private radio and television stations have been licensed, and there is a substantial take-up of pay-TV. Private television channels are jeopardised by high costs and scarce advertising revenues. Moreover, legislation requires that locally made material must comprise 60% of output. All 36 states run their own radios, and most of them operate television stations (BBC Monitoring, 2010³¹).

Nigerian radio comes in state-run and commercial forms and is available both in English and in numerous vernacular languages (especially Hausa) (Rotheray, 2010). State radio has a good reputation and is the dominant force in the market, with the exception of Lagos, where there is greater competition and private radios are preferred. Many of the private radio stations are music based (BBC Monitoring, 2010³²). There is a significant tradition of listening to international radio in Nigeria. The BBC occupies a special place in Nigerian public life. Voice of America is BBC's main international competitor, followed by Deutsche Welle (Rotheray, 2010). The range of international broadcasters targeting the region in English includes: Radio France Internationale, China Radio International, Voice of Russia, All-India Radio and a number of religious broadcasters. But although audiences in English are substantial, it is audiences in Hausa that are, according to Rotheray (2010), the key. A number of international broadcasters offer Hausa broadcasts via short wave including: the BBC, Voice of America, Deutsche Welle, China Radio International, Radio France Internationale, and the Egyptian, Libyan and Iranian external services, as well as the religious broadcasters Trans World Radio and Family Radio Worldwide (Rotheray, 2010).

State-run television dominates the television market, with the exception of Lagos, where competition comes from stations like African International Television, Galaxy Television, Silverbird Television and TVC Continental (Rotheray, 2010). State-run television operates at national and regional level. Viewing is concentrated in urban

³¹ BBC Monitoring, 'Nigeria Country Profile', http://news.bbc.co.uk/1/hi/world/africa/country_profiles/1064557.stm#media, 6 May 2010, accessed 20 August 2010.

³² BBC Monitoring, 'Nigeria Country Profile', http://news.bbc.co.uk/1/hi/world/africa/country_profiles/1064557.stm#media, 6 May 2010, accessed 20 August 2010.

areas though services cover most of the country. The progress of competing private channels is limited by high costs and scarce advertising revenue (Rotheray, 2010). A significant range of international television services are available to viewers in Nigeria, both free-to-air and via commercial operators, such as the South African-based MultiChoice. There is no international television broadcasting in Hausa.

- *India*

India, the world's second largest media market, has a relatively free media environment. India came comparatively late to television, which began on a tiny scale around 1959 (Kohli-Khandekar, 2010). For more than three decades, domestic television was dominated by the state-run service Doordashan, which today operates 21 services. Its flagship DD1 channel reaches some 400 million viewers (BBC Monitoring, 2010³³). Indian broadcasting has flourished since the monopoly was broken in 1992, and Thusu (2007) estimates that there are now more than 400 channels, including 70 dedicated news networks. This makes India one of the fastest growing television markets in the world. Rotheray (2010) identifies three notable phenomena of the Indian media market: the international availability of some of these services; the tendency for news to be sensationalised and sport- and celebrity-linked; and, third, the trend towards localisation of news. International television broadcasters do target the region in English, for example, including Al Jazeera television, BBC World News, Deutsche Welle television, CCTV-9 and Russia Today, as well as CNNI. In the case of BBC World News, a specific stream aims to attract local viewers. Because India is such an attractive market, commercial television operators have targeted the country from the first opportunity, often through local partnerships. Examples include: CNN/IBN and CNBC-TV128, among the leading news channels (Rotheray, 2010).

Since they were given the green light in 2000, music-based FM radio stations have proliferated in the cities. But only public All India Radio can broadcast news (BBC Monitoring, 2010³⁴). The All India Radio monopoly on radio news broadcasting within India is an obstacle to international broadcasters in establishing rebroadcasts through local partners. While Voice of America has dropped its broadcasting in Hindi, there are international broadcasters who continue to target India in English,

³³ BBC Monitoring, 'India Country Profile', http://news.bbc.co.uk/1/hi/world/south_asia/country_profiles/1154019.stm#media 7 June 2010, accessed 20 August 2010.

³⁴ BBC Monitoring, 'India Country Profile', http://news.bbc.co.uk/1/hi/world/south_asia/country_profiles/1154019.stm#media 7 June 2010, accessed 20 August 2010.

Hindi and other languages. Examples include: BBC, China Radio International, Deutsche Welle, Voice of Russia and the Japanese radio external service.

- *Pakistan*

In Pakistan, private broadcasters emerged only following President Musharraf's relaxation of media controls in 2002, which brought increased freedom for the print media and a liberalisation of broadcasting policies. More than 100 private FM radio stations have been licensed since. However, they are not allowed to broadcast their own news programmes, and international broadcasters have to put up with restrictions on the broadcasting of live news through local partners. The government uses legal and constitutional powers to curb press freedom, and private television news channels were closed under a state of emergency in late 2007. The broadcasting regulator also can order a halt to the carriage of foreign television channels via cable, particularly Indian or Afghan ones, at any point (BBC Monitoring, 2010³⁵). As Rotheray (2010) has pointed out, the strategic significance of the Pakistani media market is reflected in the efforts by international broadcasters to target the country. Language is a significant broadcasting issue in Pakistan, where around 72 languages are spoken (Lewis, 2009). English is used as the official language. Urdu is the national language and understood by some 80% of the population. However, only 8% use it as their first language, far fewer than Pashto and especially Punjabi (CIA World Factbook, 2010³⁶).

The state-run operator Pakistan Television Corporation Ltd (PTV) comes under the direction of the Ministry of Information and Broadcasting. It operates PTV Home; the internationally available news channel PTV News; regional networks in several languages, and entertainment channels (Rotheray, 2010).

Commercial television has been permitted since 2002 and a number of news channels have come into existence, which include: Geo News (Urdu), part of the Geo TV group; ARY News (Urdu and English), part of the ARY group; Aaj TV; Dawn News (English and Urdu), Express News (Urdu) and Express 24/7 (English) (Rotheray, 2010). A range of commercial and state-financed international broadcasters are available via satellite free-to-air within Pakistan to those with the right equipment. These include CNNI, BBC World News, Al Jazeera, Russia Today and CCTV-9.

³⁵ BBC Monitoring, 'Pakistan Country Profile', http://news.bbc.co.uk/1/hi/world/south_asia/country_profiles/1157960.stm#media, 18 August 2010, accessed 20 August 2010.

³⁶ CIA World Factbook, 'Pakistan Country Profile – People', <https://www.cia.gov/library/publications/the-world-factbook/geos/pk.html>, 19 August 2010, accessed 14 September 2010.

The state radio broadcaster, the Pakistan Broadcasting Corporation (PBC), also under the control of the Ministry of Information and Broadcasting, operates nationally and regionally in English, Urdu and 19 regional languages and reaches around 95% of the population (Rotheray, 2010). Much of the content is entertainment, some religious and educational, some news. Radio Pakistan transmits nationally on medium wave and on FM in urban areas. It runs a separate commercial FM entertainment network to attract young listeners. News and current affairs programmes are broadcast in Urdu, English and regional languages (Rotheray, 2010).

2.5 Conclusion

Overall, the increased independence and effectiveness of domestic media, together with increased competition, have significantly contributed to a richer and more varied selection of media content for domestic audiences, and, in many cases, to better quality news. But in most markets investigated here, these developments are constantly jeopardised and threatened by political instability and arbitrary actions by the government. However, this increased effectiveness of private domestic broadcasters has not gone unnoticed by international broadcasters. The next chapter explores this development, and investigates in more detail differences in the consumption of news from domestic and international broadcasters, as well as from different platforms.

3 The consumption of news from domestic and international providers – across different platforms

3.1 Overview

Given the political and infrastructural backgrounds of the individual countries, as outlined in the previous chapter, the following picture emerged for each market in terms of media consumption through literature and secondary data analysis.³⁷ This chapter deals with consumption of news of domestic compared with international providers across radio and television. Findings for internet and mobile phones for each market will be discussed in Chapter 4.

3.2 Algeria³⁸

Section summary

Algerian media operate in a controlled environment. While no direct censorship exists, laws set out prison terms and fines for insulting or defaming the president, MPs, judges and the army. Algeria's television and radio stations are state controlled, but there is a lively private press, which often criticises the authorities. Satellite television is popular; stations based in France target viewers in Algeria. The most frequently used radio stations are national radio stations such as Radio El Bahdja and Chaîne 3. International radio stations such as BBC London Arabic, RFI, Radio Sawa, DW or VOA are only used to a marginal extent by the general population, but are frequently accessed by opinion leaders. The picture looks different for television. The main and dominant television providers are Al Jazeera, ENTV (terrestrial) (Algerian National Television Network), Canal Algérie (managed by ENTV), MBC (Middle East Broadcasting Center) and Al Arabiya. Algerians consume content from a mix of national and international providers. While more

³⁷ These figures are based on audience research reports and data-sets from the BBC, France 24 and the Broadcasting Board of Governors (BBG). As has been outlined in section 1.3, it is important to note that many of the studies analysed for this purpose did not have full national coverage and were not consistent across the target countries. A descriptive approach was chosen to analyse the data. Because of the wide variety of sources, each data set was unique in terms of variables and sample size. Details of the data-sets analysed can be found in the Appendix. Due to the multiple data sources and the restricted time available, it was not possible to compare the media consumption of individual countries over time, nor was the comparison of data possible across all countries. Weights were used in only a few cases. Consequently, the findings are snapshots of the media habits of the individual data samples and need to be interpreted accordingly.

³⁸ For data sources, see Appendix.

content from national providers is consumed on the radio, the television market seems to offer opportunities for international providers, particularly French and Arabic channels, as consumption figures for the French channels TF1 and France 2 suggest. Sadly, most of the raw data available for this study was from 2007 and is therefore too dated to allow conclusions of how new entrants such as France 24 or BBC Arabic are getting on, although a later study carried out by France 24 and addressed later in this section gave some insight into how these new entrants were doing. On balance, national providers seem to be strong in the radio market, and former colonial (French) providers as well as pan-Arab regional and partly national providers traditionally seem to be strong in the television market. The data does not allow conclusions of how both national and international providers are succeeding on new media platforms. With an internet penetration of only 13.6%, providers using internet platforms are still catering to a small segment of the population. However, with the ever growing popularity of internet cafés and a rapidly expanding mobile phone market, this trend undoubtedly will change in the future. Mobile phones are widely used – a trend that is set to grow further with the increasing covering of the country by mobile phone networks.

Television, radio and mobile phones are by far the most frequently owned media appliances in Algeria. Following the unweighted sample of the 2007 Intermedia Algeria national survey, 97.9% of all households own a television and 88.1% have a working satellite dish for television in their households; 79.2% of households own a radio, and 82.4% own a mobile phone. However, these figures are based on an urban, slightly more affluent sample, so numbers for rural areas may look quite different.

Generally, Algerians are avid news consumers (Figure 3.1). News about Algeria and other Arab countries seems particularly popular.

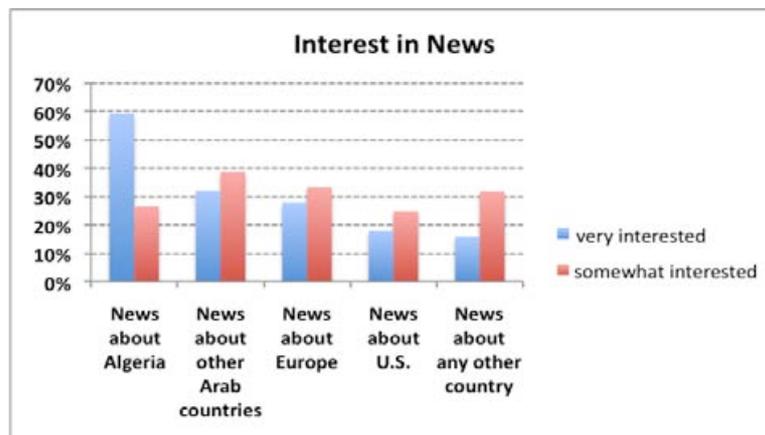


Figure 3.1: Interest in news, Algeria (% of those surveyed) (Source: Intermedia Urban Survey Algeria 2007).

Television, newspapers and radio are the most consumed news media in Algeria. As illustrated in Figure 3.2, Arab satellite television is slightly more watched than other international satellite television channels, which are watched daily by 41%. While 24.7% tune in every day to listen to national or local providers of news on the radio, only 4.8% listen to international radio stations.

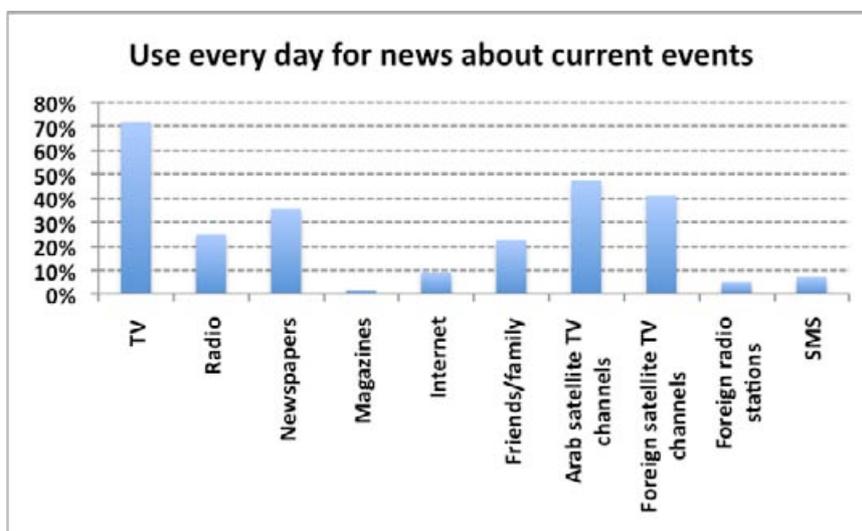


Figure 3.2: Media used daily for news about current events, Algeria (% of those surveyed) (Source: Intermedia Urban Survey Algeria 2007).

Radio consumption in Algeria

66.3% of participants in the 2007 Algerian Urban Survey indicated they had listened to radio in the past 12 months, with 33.9% of listeners indicating they would listen daily to the radio. The majority of those with access to a radio listen to FM stations. Only a small minority of less than 5% seem to listen to satellite radio, medium- or short-wave. This may explain why only few people listen to international stations on radio in Algeria. In 2007, music and news were the most frequently listened to radio genres in Algeria, and almost a quarter of the respondents in the Algerian 2007 National survey indicated they would listen to news programmes on a daily basis. Most people who listen to news programmes seem to listen to the morning bulletins.

An abundance of radio stations are available in Algeria, though many listeners seem to be unaware of the majority of these stations, particularly international ones (Figure 3.3).

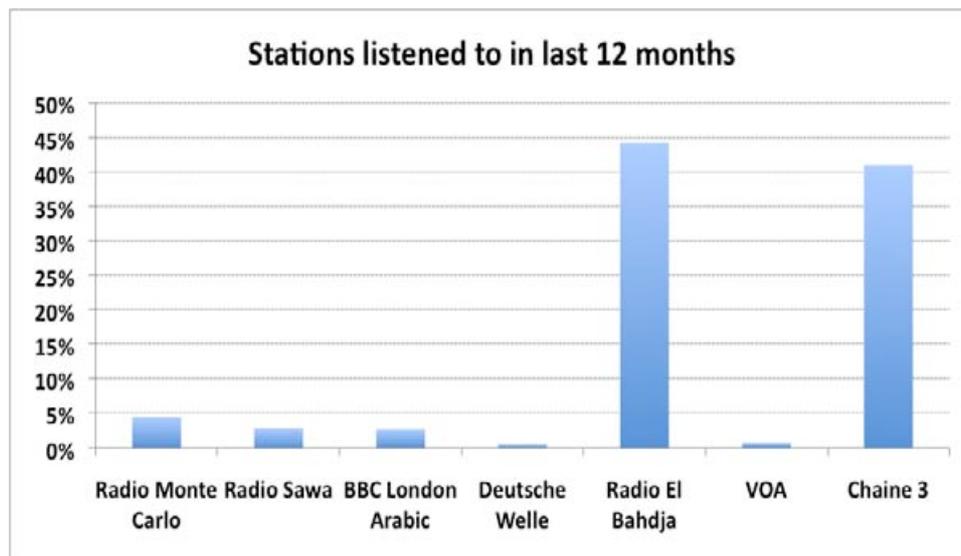


Figure 3.3: Stations listened to in last 12 months, Algeria (Source: Intermedia Urban Survey Algeria 2007).

The national radio stations Radio El Bahdja and Chaîne 3 were the stations which most of the participants indicated they had listened to and which they rated as the most important radio sources for information, followed by other domestic and local stations such as Radio Bahia FM, Radio El Hidhab or Cirta FM. Less than 5% of respondents had listened to international stations like Radio Monte Carlo, Radio Sawa, BBC London Arabic, Deutsche Welle or VOA.

No significant differences were found between social classes as regards listening to international providers such as VOA or BBC London, which may partly be due to the very low listening figures for these international providers, for significant differences do exist between social classes with regard to listening to some of the domestic providers such as Radio Annaba, Cirta FM, Radio Bahia or Radio Tlemcen. However, these differences varied in direction. While significantly more people than expected from lower socio-economic backgrounds had listened to Radio Bahia FM, and Radio Tlemcen, significantly more people from higher socio-economic backgrounds had listened to Radio Annaba or Radio Cirta. Significant differences also exist between men and women listening to international providers such as VOA, BBC London in Arabic or Radio Monte Carlo, with significantly more men listening to these international providers than women. Age also had an impact on whether people had listened to specific radio stations over the past 12 months. Significantly more young people had listened to local stations such as Radio Bahia FM or Radio Cirta. Figures for international stations were not as clear, with audiences, albeit very small ones, among both older and younger listeners. However, significantly more young people than expected indicated that they listened to Radio Sawa.

Television consumption in Algeria

In the 2007 National Survey carried out by Intermedia, 96.5% of respondents indicated that they had watched television in the last 12 months, and only slightly less (95.3%) had watched television within the last 7 days. Most viewers seem to watch eclectically: rather than just watch one channel all night, they seem to choose different things on different channels, as the following figure indicates (based on respondent's last evening of television viewing):

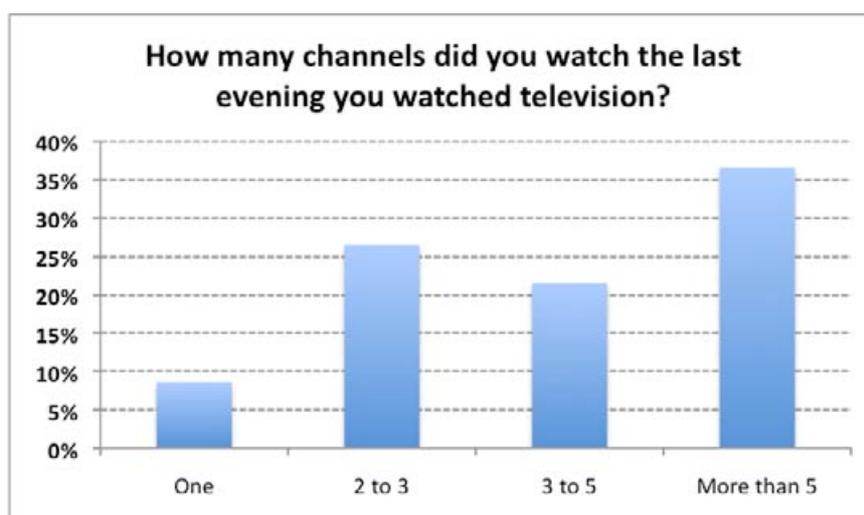


Table 3.4: Number of channels watched on last evening respondent watched television, Algeria (Source: Intermedia Urban Survey Algeria 2007).

More than 80% of viewers in the Algerian Urban Survey of 2007 indicated that they were somewhat or very interested in viewing news programmes. Older people indicated significantly more often than young people that they were interested in watching a news programme or a discussion of current affairs on television. Younger people preferred television programmes on fashion and culture.

Al Jazeera and ENTV are the most spontaneously recognised news channels, followed by TF1, MBC and Canal Algérie. 77% indicated they had watched Al Jazeera in the last 12 months, while 72% had watched ENTV and 64% had watched Canal Algérie. While some of the neighbouring broadcasters, like LBC or MBC, or indeed French channels like TF1 or France 2, were watched by more than 50%, among the other international broadcasters only TV5 (41.8%) and Euronews (37.8%) were watched to a higher degree, while less than 20% had watched international providers like the American-owned Al Hurra (19.6%), France 24³⁹ in French (15.6%)

³⁹ However, these low figures for France 24 may also be attributable to the fact that France 24 was still relatively young in this market in 2007 (France 24 started broadcasting on 6 December 2006).

or France 24 Arabic (11.1%), BBC World (9.7%), CNN International (9.6%), Rusiya Al-Yaoum (Russia Today in Arabic) (2.4%) or Deutsche Welle (2.1%) (Figure 3.5).

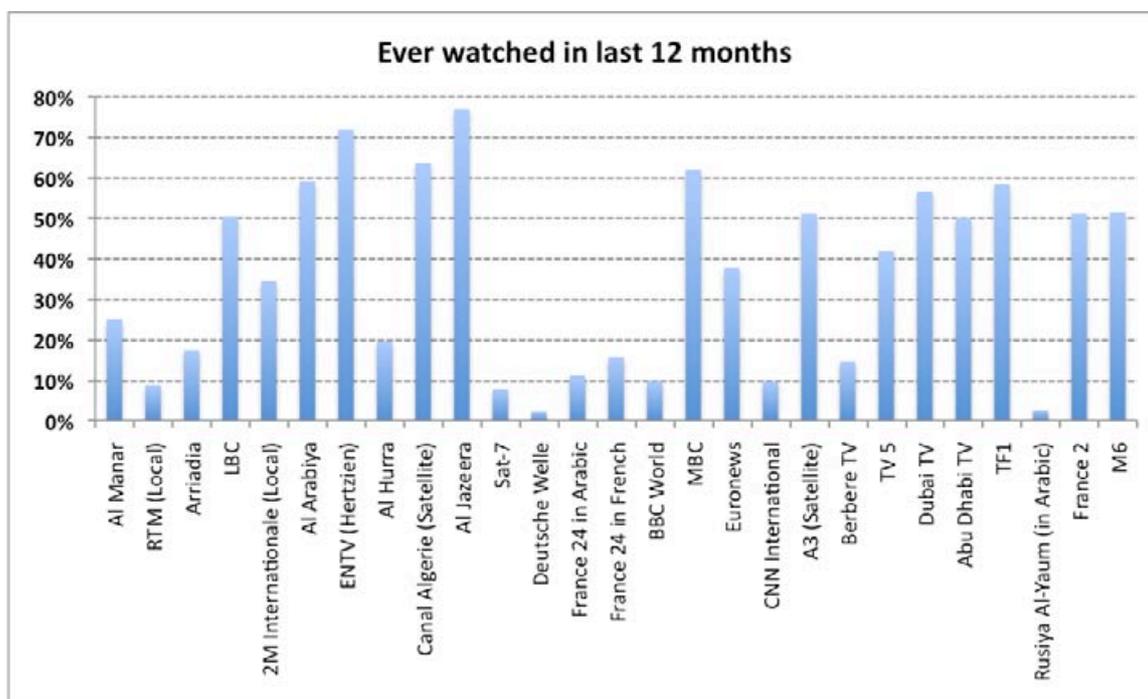


Figure 3.5: Channels watched in last 12 months, Algeria (Source: Intermedia Urban Survey Algeria 2007).

Qatar-based Al Jazeera (57.8%), Saudi-owned Al Arabiya (32.3%) and the Algerian channel ENTV (27.4%) were the three channels perceived as providing the most important information and news (Figure 3.6).

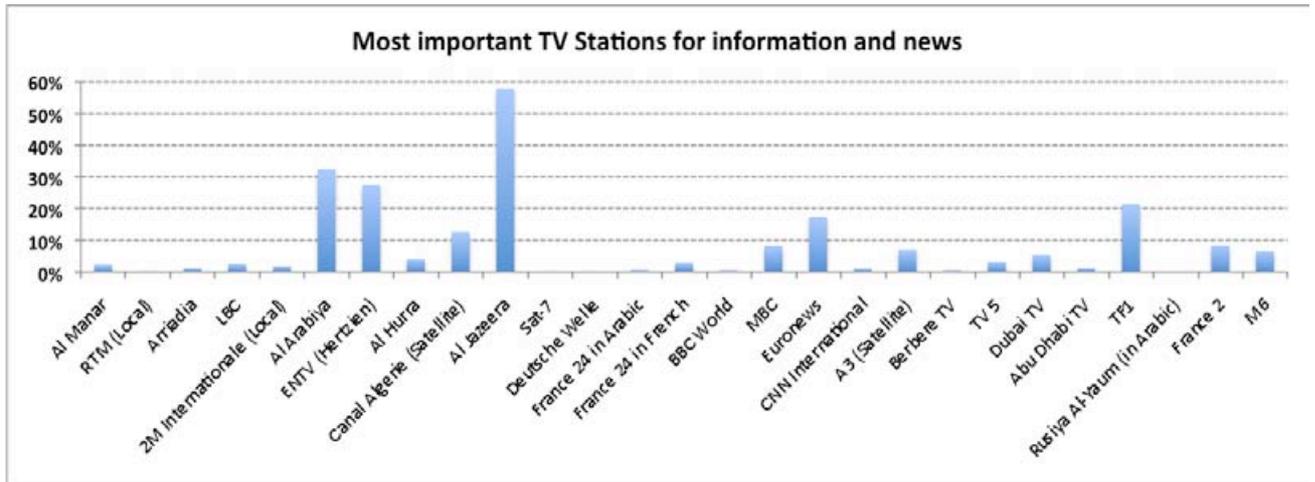


Figure 3.6: Most important television channels for information and news, Algeria (Source: Intermedia Urban Survey Algeria 2007).

A later study of 450 heads of households carried out by France 24 in 2009 (Figure 3.7), suggests that Al Jazeera and Al Arabiya are by far the most watched news channels, followed by Médi 1 Sat and the American channel Al Hurra. Of the 40% of respondents who indicated they would watch France 24, 33% indicated they would watch France 24 in French, 17% in Arabic and 10% in English. Between consumers of news, socio-economic differences exist, for Al Arabiya is watched slightly more by people of lower socio-economic classes (SES C) than other popular news channels such as Al Jazeera, according to the France 24 data report. However, this survey only included respondents of socio-economic classes (SEC) A–C. The 2007 Algerian survey carried out by Intermedia, considering socio-economic classes A–E, suggests very similar trends.

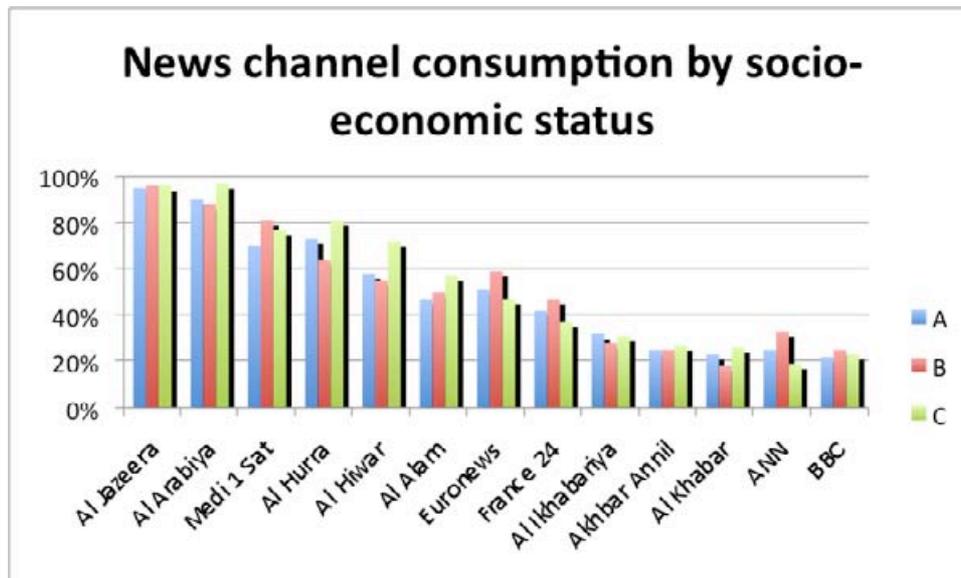


Figure 3.7: Consumption of news channels by socio-economic status, Algeria (AB = upper & middle class, C = middle class; sample: 450 heads of households with satellite receivers) (Source: France 24, 2009).

Significant differences exist between men and women watching international providers such as CNN International, BBC London or France 24. Statistically significantly more men than women indicated that France 24 in English and in Arabic, VOA, CNN International, Euronews, TF1 and BBC World was their most important source of information. Meanwhile, significantly more women than men indicated that Berber TV, Dubai TV, LBC and Abu Dhabi TV were their preferred source of news. However, this significance could partly be due to the low viewing figures for CNN, BBC or France 24.

Age also seems to play a crucial role in the popularity of information sources, with significantly more people over 40 years indicating that ENTV was their most important source of information, and significantly more younger people than expected indicating that Al Arabiya was their most important source of information.

News programmes provided by Al Jazeera were ranked as the most relevant, most up to the minute, most unbiased and balanced, providing the most detailed analysis of current events as well as the most accurate and uninfluenced news compared to other news channels such Al Arabiya, MBC1, ENTV Algérie, Canal Algérie or Al Hurra (Figure 3.8).

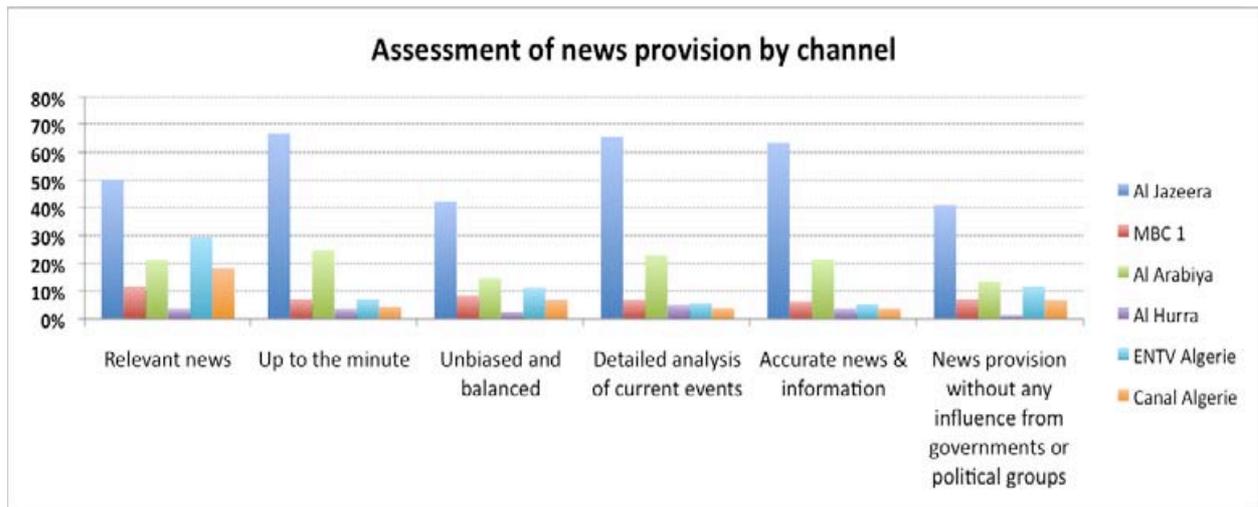


Figure 3.8: Assessment of news provision by channel, Algeria (Source: Intermedia Urban Survey Algeria 2007).

Meanwhile domestic providers ENTV Algérie and Canal Algérie were perceived by some consumers as the least accurate and most biased channels (Figure 3.9), while other channels, such as Al Hurra or Al Arabiya were perceived by some as not needed as the other channels watched sufficed (Figure 3.10).

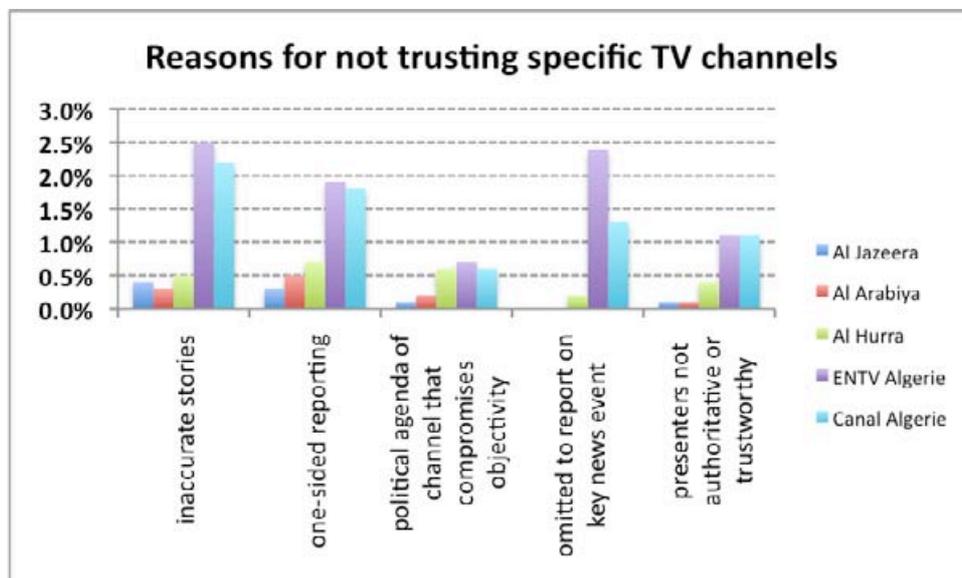


Figure 3.9: Reasons for not trusting television channels, Algeria (Source: Intermedia Urban Survey Algeria 2007).

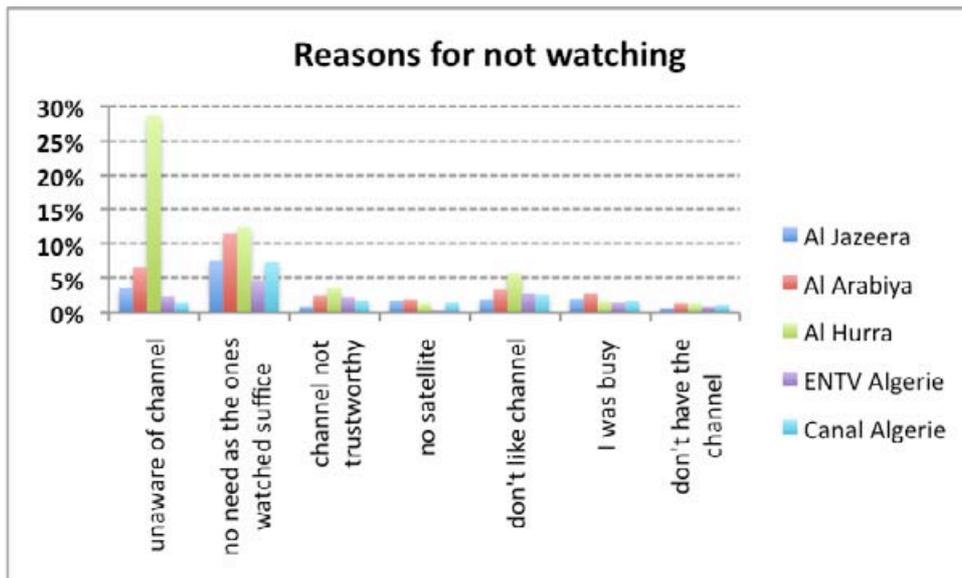


Figure 3.10: Reasons for not watching television channels, Algeria (Source: Intermedia Urban Survey Algeria 2007).

While these findings apply to the general Algerian population, the picture of media consumption by opinion leaders looks slightly different. A survey of opinion leaders in Algeria carried out for France 24 indicates that Al Jazeera and Euronews are the most widely known international news channels among opinion leaders (France 24, 2009) (Figure 3.11).

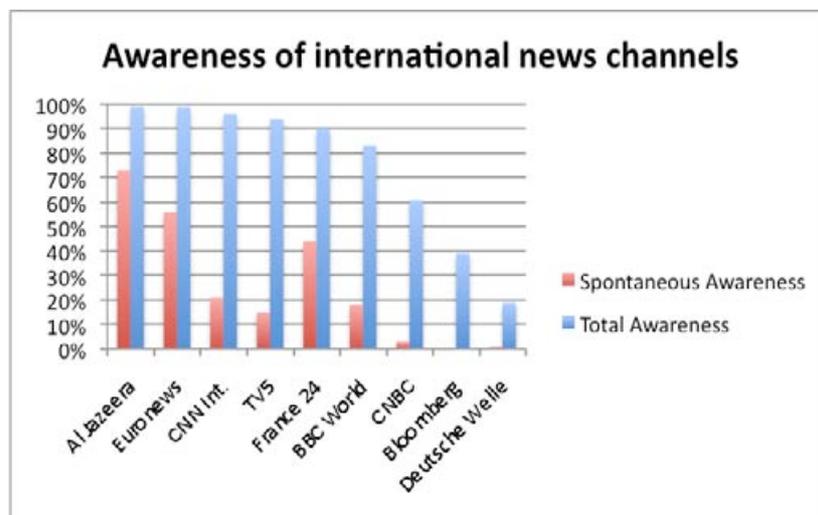


Figure 3.11: Awareness of international news channels among opinion leaders, Algeria (Source: France 24, 2009).

Among opinion leaders, Euronews is the most regularly watched international news channel (73%), followed by France 24 (67%), Al Jazeera (62%) and TV 5 (57%), followed by CNN International (18%) and BBC World (13%). (Source: France 24, TNS SOFRES, January 2009).

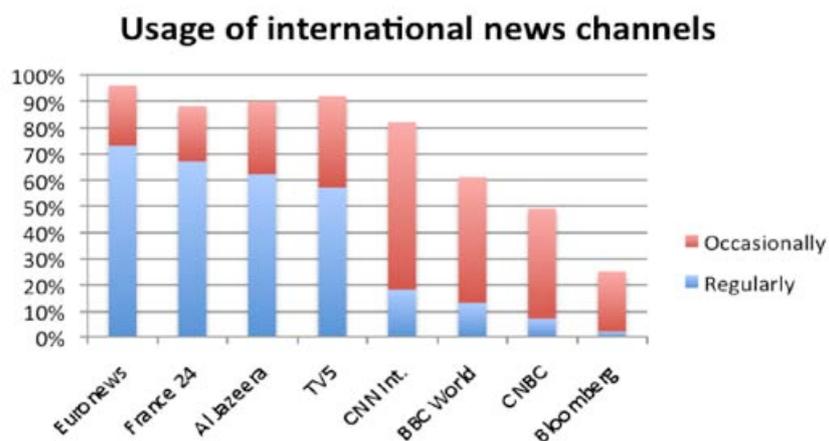


Figure 3.12: Usage of international news channels among opinion leaders, Algeria (Source: France 24, 2009).

Opinion leaders perceive international news channels quite differently from the rest of the Algerian population, and rank the BBC, CNBC and particularly CNN among the least impartial and honest, while TV 5 achieves the highest impartiality ratings. Al Jazeera is perceived as the most independent channel by opinion leaders (Figures 3.13 and 3.14).

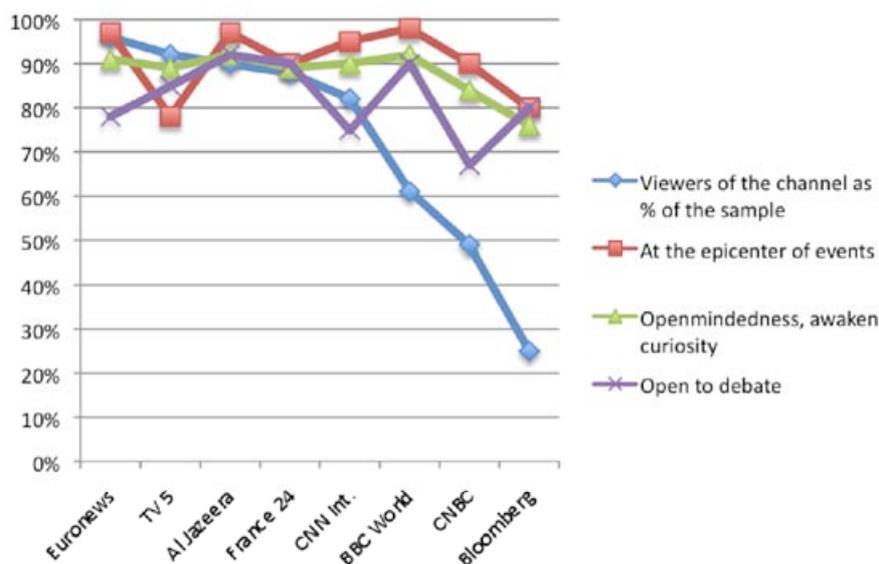


Figure 3.13: Perception of international news channels by opinion leaders, Algeria (1) (Source: France 24, 2009).

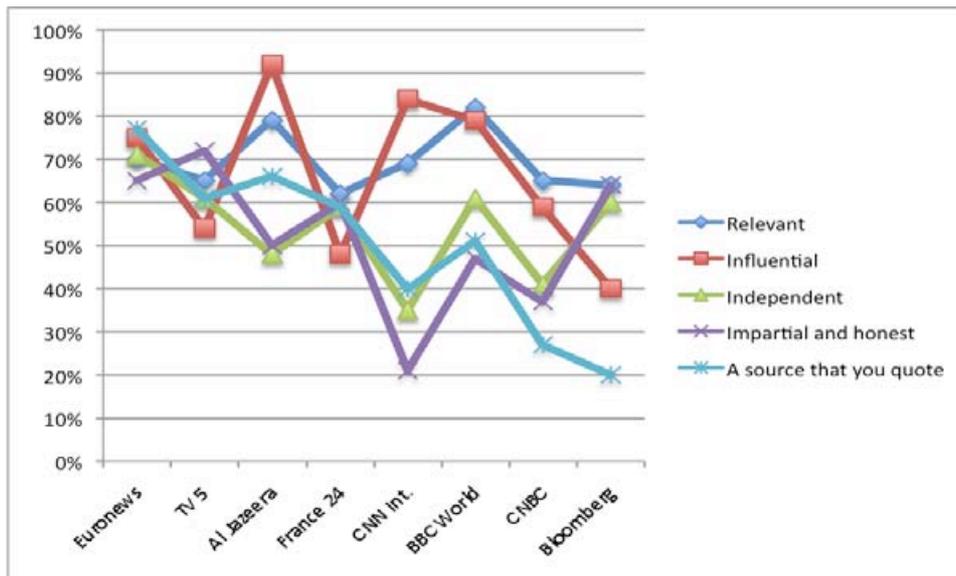


Figure 3.14: Perception of international news channels by opinion leaders, Algeria (2)
 (Source: France 24, 2009).

There clearly seems to be a trend towards pan-Arab and French channels in Algeria, as opinion leaders as well as the more general population prefer these international channels to English/American channels and perceive them as more honest. Whether this is because of language issues or political/cultural issues remains a topic for further research.

Overall, these findings suggest that in Algeria, in common with some of the other target markets investigated, Arab satellite channels are watched by the whole population, while international satellite news channels are more frequently watched by opinion leaders and the social elite. This may partly be due to costly access and high pay-TV fees to access international providers (see also section 2.4).

3.3 Egypt

Section summary

Media in Egypt operate in a restricted environment. There are two state-run national television channels and six regional channels, but many viewers turn to pan-Arab channels for their news. Egypt is a big force in satellite television. Private satellite television stations include the highly popular channels Dream 1, Dream 2 and El-Mehwar TV. Al Jazeera, Dream 2 and Channel 1 are the most watched television channels in Egypt. Al Kor'an Al Karim and Nougoum FM are the radio stations with the widest daily reach. International providers such as the BBC, CNN or VOA are only consumed to a marginal degree by the general population, but much more frequently by opinion leaders. On balance, national providers seem to be strong in the radio market, and pan-Arab and national providers seem to be strong in the television market. Former colonial providers are viewed with some suspicion. With an internet penetration of 21.2%, Egypt is one of the countries in Africa with the highest internet penetration, a trend that will continue to increase. Mobile phones are widely used.

Television is the most popular source for news in Egypt, with 74% of Egyptians watching daily, followed by radio (19%), newspapers (12%) and the internet (5%). Non-Egyptian sources are widely used for news with 36% of adults viewing Arabic satellite channels daily. International television is watched by 10% daily for news and international radio by 1% (BBC, 2009⁴⁰).

Egyptians are interested in watching news, particularly news about other Arab countries, following findings of a survey carried out by Intermedia in Egypt in 2009 (Figure 3.15).

⁴⁰ BBC, 2009. 'Egypt – Media Market at a Glance', August 2009, Source: BBC GND/Intermedia.

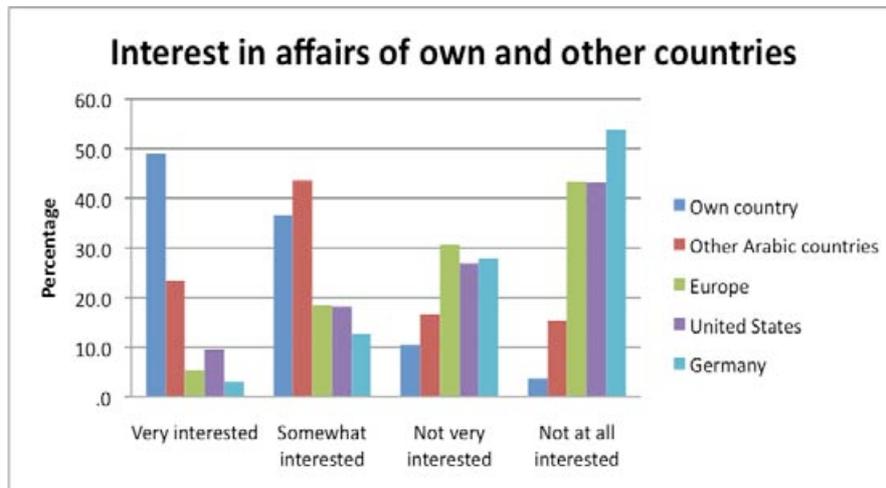


Figure 3.15: Interest in news of own and other countries, Egypt (Source: Intermedia National Survey Egypt 2009).

Radio consumption in Egypt

Egypt is an unusual media market in that more people listen to MW stations than FM. According to the BBC (2009), this may be due to factors such as the limited choice and reach of FM stations or tight government control of media (BBC, 2009⁴¹).

The state's radio monopoly was broken with the arrival of private, commercial music stations in 2003,⁴² and today commercial music stations are highly popular. A survey carried out by France 24 in 2009 suggests that Al Kor'an Al Karim and Nougoum FM are the radio stations with the widest daily reach, at least among the higher income groups surveyed (Figure 3.16).

⁴¹ BBC, 2009. 'Egypt – Media Market at a Glance', August 2009, Source: BBC GND/Intermedia.

⁴² http://news.bbc.co.uk/1/hi/world/middle_east/country_profiles/737642.stm, accessed 12 June 2010.

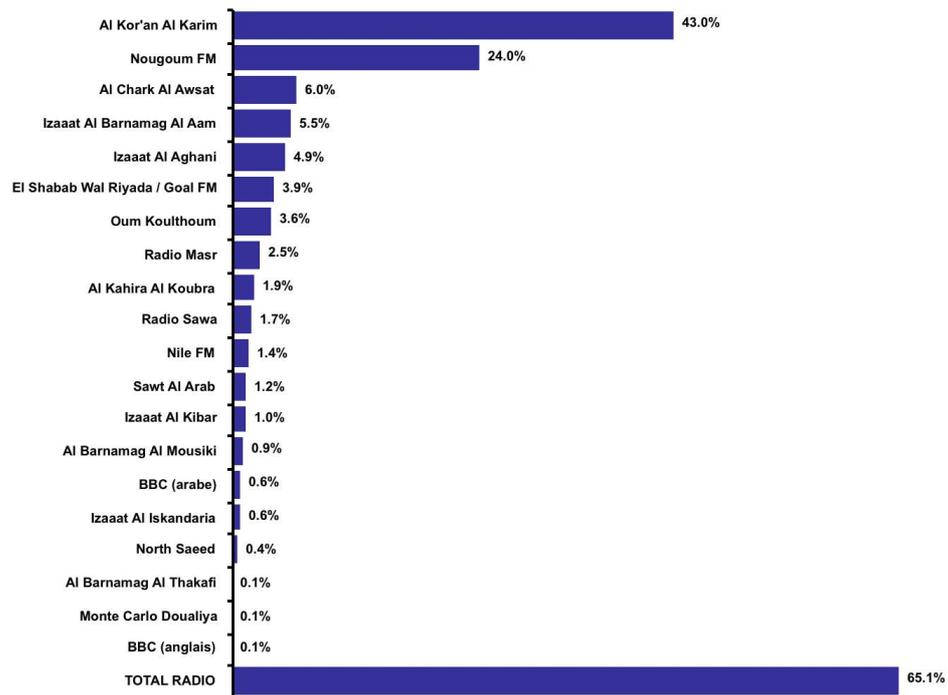


Figure 3.16: Daily reach of radio stations, Egypt (Source: IPSOS – Stat. Base: 15+ urban population in Egypt – Universe: 19 189 000 – June 2009).

Television consumption in Egypt

There are two state-run national television channels and six regional channels, but many viewers turn to pan-Arab channels for their news. Egypt has a strong presence in the satellite television market and its Space Channels are popular across the Arabic-speaking world, as has been outlined in Chapter 2. Egypt was the first Arab nation to have its satellite, Nilesat 101. Private satellite television stations include Dream 1, Dream 2, and El-Mehwar TV (BBC Monitoring, 2010⁴³).

A study carried out by the American Broadcasting Board of Governors in January 2009 ranked the top television channels in Egypt (Table 3.1).

⁴³ http://news.bbc.co.uk/1/hi/world/middle_east/country_profiles/737642.stm, accessed 12 June 2010.

Rank	TV channel	yesterday watched %	weekly watched %
1	Al Jazeera	35.2	70.1
2	Dream 2	30.1	61.0
3	Egyptian Channel 1	27.6	58.0
4	Dream 1	26.0	56.1
5	Ikraa	26.4	53.2
6	El Mehwar	25.5	52.2
7	Egyptian Channel 2	21.4	44.6
8	Egyptian Space Channel	18.6	46.2
9	MBC Action	17.6	40.3
10	Nile News	12.6	37.8
11	MBC 1	12.2	34.4
12	Al Arabiya	10.3	28.0
13	MBC 4	5.9	19.2
14	Dubai TV	5.5	16.3
15	Showtime	5.2	12.3
16	Nile TV	4.9	13.8
17	LBC	3.9	13.1
18	Alhurra	3.0	11.1
22	BBC Arabic	1.5	4.8

Table 3.1: Most watched television channels in Egypt (red = pan-Arab channels, yellow = Egyptian channels, green = international channels based outside the Middle East) (Source: Intermedia National Survey Egypt 2009; N = 2006).

In the Intermedia National Survey Egypt 2009, 48.1% of participants stated that Al Jazeera was the most important source for information and news for them, and 13.8% stated that the Egyptian Channel 1 was the most important source. International channels such as France 24 or BBC Arabic were only watched to a marginal degree, and in fieldwork carried out for this project in July 2010 in Cairo, hardly any of the young participants had heard of the BBC, nor knew from which country the broadcaster came.

However, while Al Jazeera was on the top of the ranking list in 2009, its popularity may have suffered in recent months, following a dispute between Egypt and Algeria after a World Cup football qualification match in Sudan on 18 November 2009, after which Al Jazeera was accused by many Egyptians of biased reporting. Judging by

comments made by some of the consumers during our fieldwork in Cairo in July 2010, many Egyptian consumers resented Al Jazeera’s coverage of that conflict, and said that they no longer felt that they could fully trust Al Jazeera as a news source. In June this year, Al Jazeera Sport’s World Cup football broadcasts carried by Egypt’s NileSat operator and Arabsat of Saudi Arabia (Wall Street Journal, June 2010⁴⁴) were disrupted, and some sources suggested that Al Jazeera Sport’s transmissions had been deliberately jammed. Whether and how this dispute has affected viewership and trust by Egyptian consumers of Al Jazeera in the long run remains to be seen.

Most people watch more than one channel per session, and interviews with television consumers in Egypt suggest that their watching habits are guided by presenter personalities and content rather than brand loyalty (Figure 3.17).

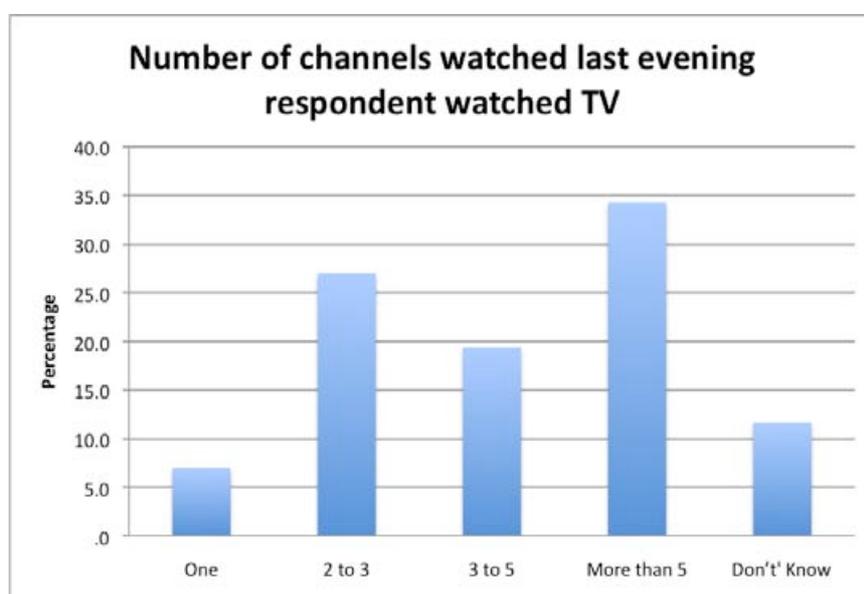


Figure 3.17: Number of channels watched last evening respondent watched television, Egypt (Source: Intermedia National Survey Egypt 2009).

For example the news talk show *Al Ashira Masa'an* (10 o'clock) on Dream 2 channel, in which the highly popular presenter Mona El-Shazly interviews Egyptian and foreign politicians, was spontaneously mentioned in most of the focus group discussions during fieldwork carried out for this project, as was the current affairs show of the outspoken presenter Moataz Al-Demerdash, *Teseen Dakeeka* (90 Minutes) on the El Mehwar satellite television channel, or indeed the highly popular *El Beit Beitak* (Feel at Home), which was recently renamed to *Masr Inaharda* (Egypt Today),

⁴⁴ The Wall Street Journal Online, 'Al Jazeera Criticized for Flawed Cup Broadcasts', http://online.wsj.com/article/NA_WSJ_PUB:SB10001424052748703650604575312410215672840.html, 18 June 2010, accessed 23 August 2010.

presented by Mahmoud Saad and colleagues on Egypt’s Channel 2 (previously on Channel 1).

However, as in the Algerian media market, considerable differences exist between the general Egyptian public and opinion leaders in Egypt in terms of which channels they watch.

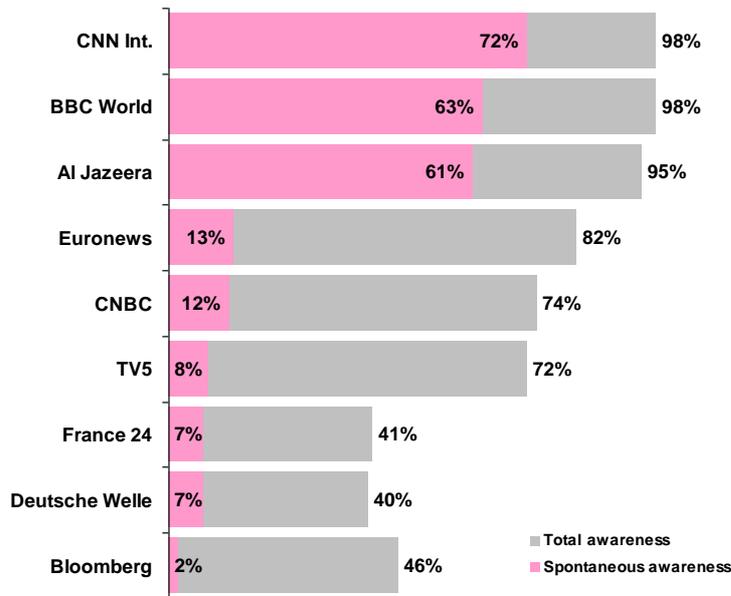


Figure 3.18: Awareness of international television channels by opinion leaders, Egypt (Source: TNS SOFRES / Oct. – Nov. 2009, 112 opinion leaders in Egypt; Base: Opinion Leaders – All respondents; France 24).

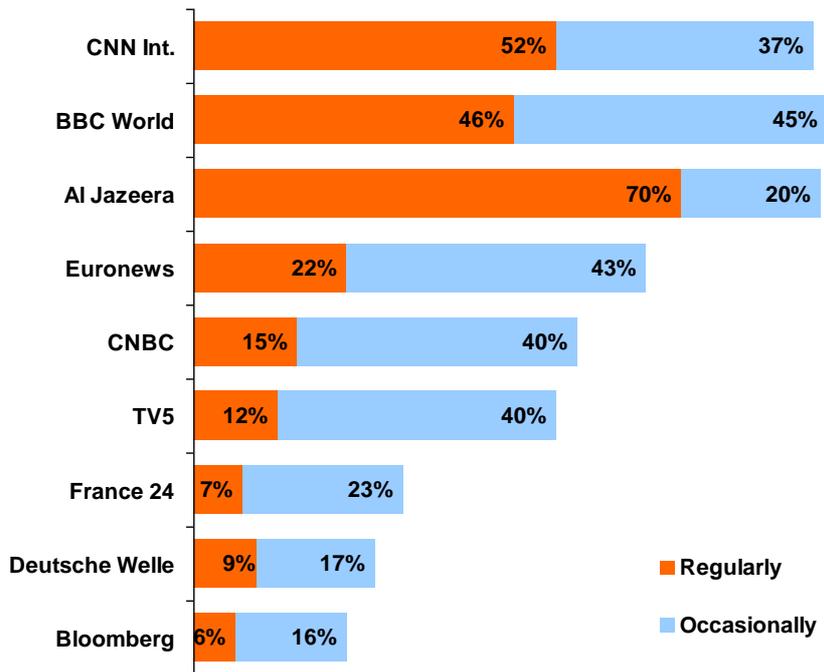


Figure 3.19: How often do you usually watch...? Regularly /occasionally, Egypt (Source: TNS SOFRES / Oct. – Nov. 2009, 112 opinion leaders in Egypt; Base: Opinion Leaders – All respondents, France 24).

CNN International, BBC World and Al Jazeera seemed to be the channels of which most opinion leaders were aware, and also the most frequently watched international channels, according to a study carried out by France 24 in 2009 (Figures 3.18, 3.19).

3.4 Senegal

Section summary

Senegal enjoys, compared to other African states, a relatively liberal media environment, and the constitution guarantees media freedom. The government does not practise censorship, but there are laws in place which prohibit reports that discredit the state, incite disorder or disseminate 'false news'. However, the private media frequently criticise the government. Radio is the most influential medium, at least in rural areas, and commercial and community stations have increased rapidly since the 1990s. Many people access RFI on the radio, which is highly popular. In urban areas such as Dakar, private television is the most influential medium for current affairs. The most important and dominant providers are private channels, although international channels such as TV5 or France 24 enjoy popularity, too. Private channels such as 2STV or Walf Info are highly popular. It seems that these private channels provide a balance to the government-owned RTS channels, which are seen as the mouthpiece of the government by many.

Senegal has one of the most liberal media environments in the region. Senegalese radio is the most important medium in rural areas, but Senegalese private television is the most popular source of information for any type of news in urban areas such as Dakar. In a study carried out by France 24 in 2009, 57% of the survey participants indicated that they would first turn to Senegalese private television to get more information if a news event occurred in Senegal, while only 4% stated that they would turn to Senegalese state television (Table 3.2).

	<i>Media first turned to when a news event occurs ...</i>		
	<i>in Senegal (% of total)</i>	<i>in Africa (% of total)</i>	<i>in the world (% of total)</i>
Senegalese radio	32	15	13
International radio	5	18	18
Senegalese print	2	1	1
International print	0	2	2
Senegalese state TV	4	7	7
Senegalese private TV	57	42	38
International TV	1	14	22
Internet	0.4	1	1

Table 3.2: Media first used for current affairs and news, Senegal (Dakar) (Source: Africascope 2009, Dakar March 2009, TNS SOFRES. Base: Population 15+ – All respondents/Universe = 1,473,000; France 24).

Radio consumption in Senegal

32% of the participants stated that they would turn to Senegalese radio for news about Senegal. However, more participants (18%) suggested that they would turn to international radio for news about Africa than to Senegalese radio (15%). The most spontaneously named radio stations in the same survey were Walf FM (87% of

participants), RFM (63%) and Sud FM (51%). 33% of participants spontaneously named RFI (Radio France Internationale), 10% Africa No. 1, and 6% of participants the BBC. Though BBC can be picked up locally via the FM band, in our fieldwork in Dakar in July 2010, only few of the focus group discussion participants indicated that they had listened to it. Those who did saw in the BBC an opportunity to learn or improve their English. The majority of the people interviewed stated that they would not listen to the BBC due to the language barrier. Many do not know that the station has a French service section and some of those who had heard the name before assumed that the BBC was a music station. As reflected in Figure 3.20, the most spontaneously named radio stations are also among those with the widest daily reach in Dakar, together with Radio France Internationale, which in our fieldwork also turned out to be highly popular among radio listeners in Dakar.

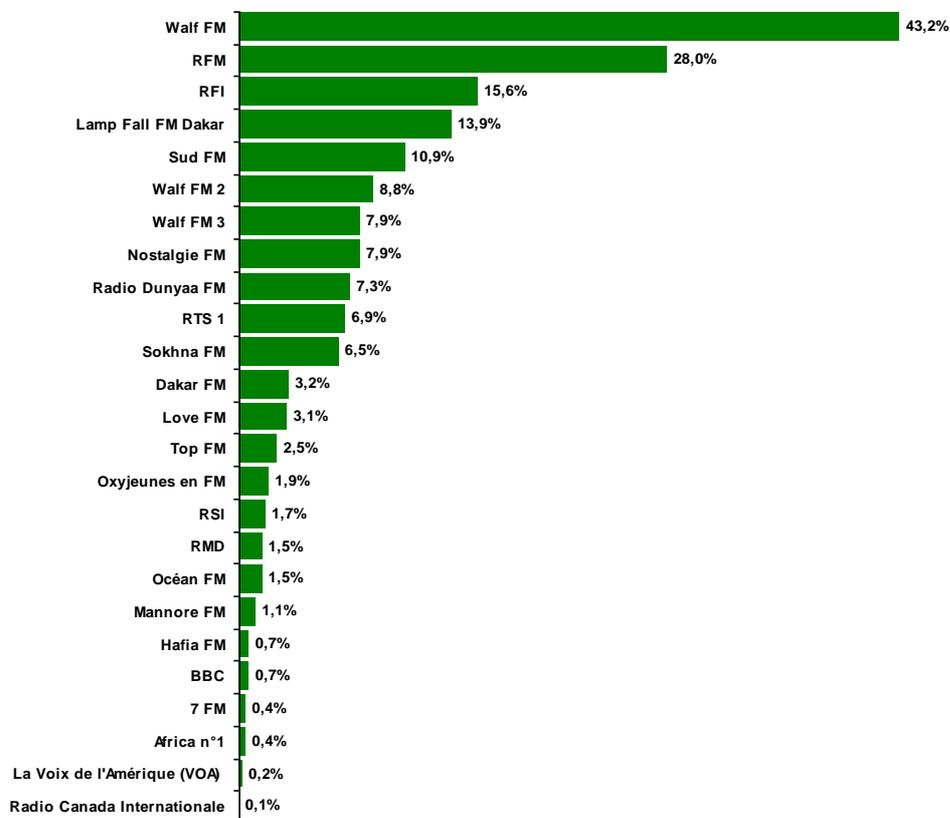


Figure 3.20: Daily reach of radio stations, Dakar, Senegal (Source: Africascope 2009, Dakar March 2009, TNS SOFRES. Base: Population 15+ – All respondents/Universe = 1,473,000; France 24).

Television consumption in Senegal

Domestic private television is highly popular among Senegalese viewers, particularly Canal info, Walf info and 2STV (as measured in Dakar). Not surprisingly, Walf info and the state-run channel RTS1 were the channels of which most people were spontaneously aware of in a study carried out by France 24 in 2009 in Dakar (Figure 3.21).

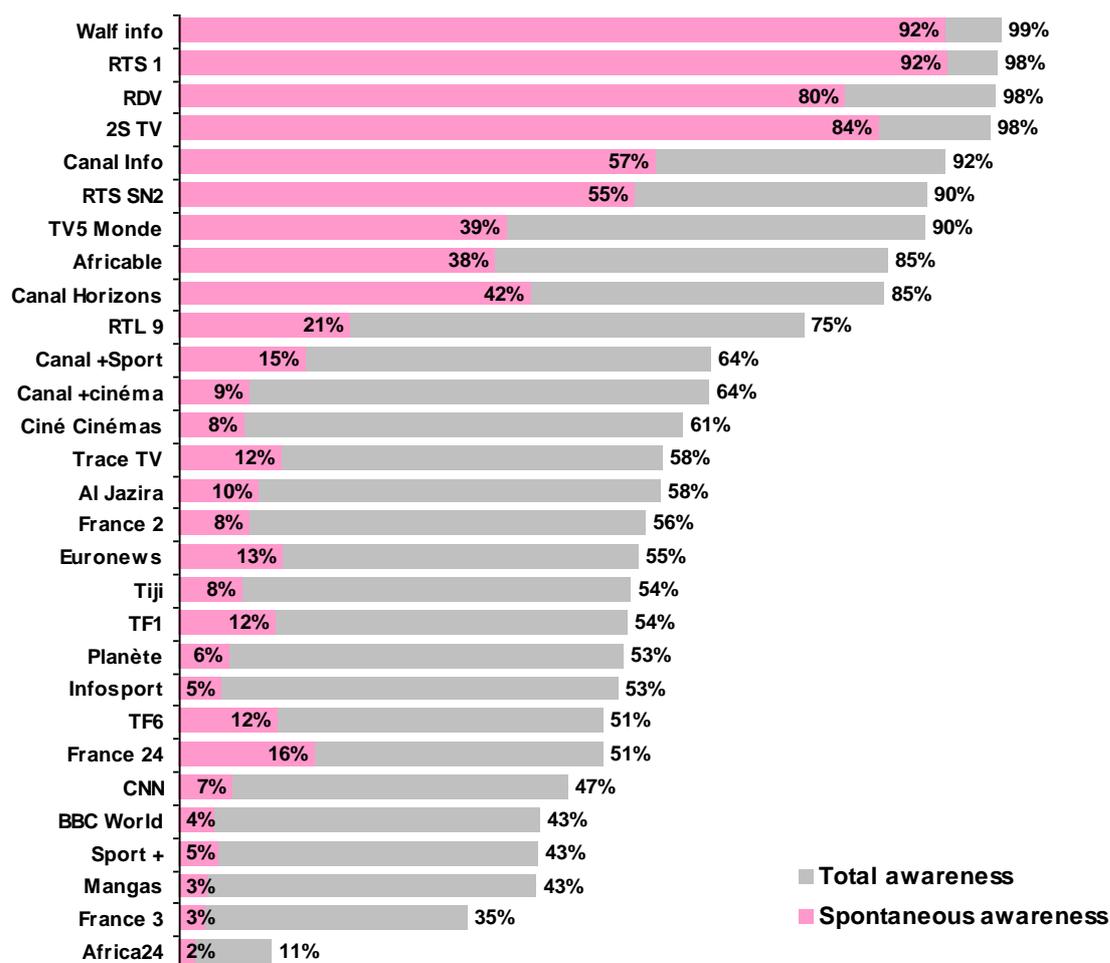


Figure 3.21: Awareness of television channels, Senegal (Source: Africascope 2009, Dakar March 2009, TNS SOFRES. Base: Population 15+ – All respondents/Universe = 1,473,000).

Canal info, a local television station in Dakar, turned out to be the station with the widest weekly reach (46%) in the same study, followed by the state-run RTS 2 channel, which achieved a weekly reach of 43%, and RDV, which reached 40% (Figure 3.22). Although the state-run television channels, RTS1 and RTS2 are seen as the mouthpiece of the government by many, many people still watch them, presumably because it was, for a long time, the only television channel available in Senegal.

Among the most popular international news providers in Dakar are TV5, France 24, and Euronews, besides the highly popular sports channel Canal + Sports, which airs European football league matches, notably matches of the English premier league. TV5 has been present in Senegal for many years and access is free, though people need to buy a special antenna to be able to receive TV5. Senegalese television consumers are generally aware of international broadcasters because domestic media buy in media content from international media outlets, so that during the news hour, some of the images that stem from international media carry their corporate names or logos in one corner of the screen.

In addition, some international channels use domestic providers as partner channels. The local television channel RDV for example airs France 24 at certain hours of the day, while 2STV gives viewers the opportunity to watch Euronews at certain times.

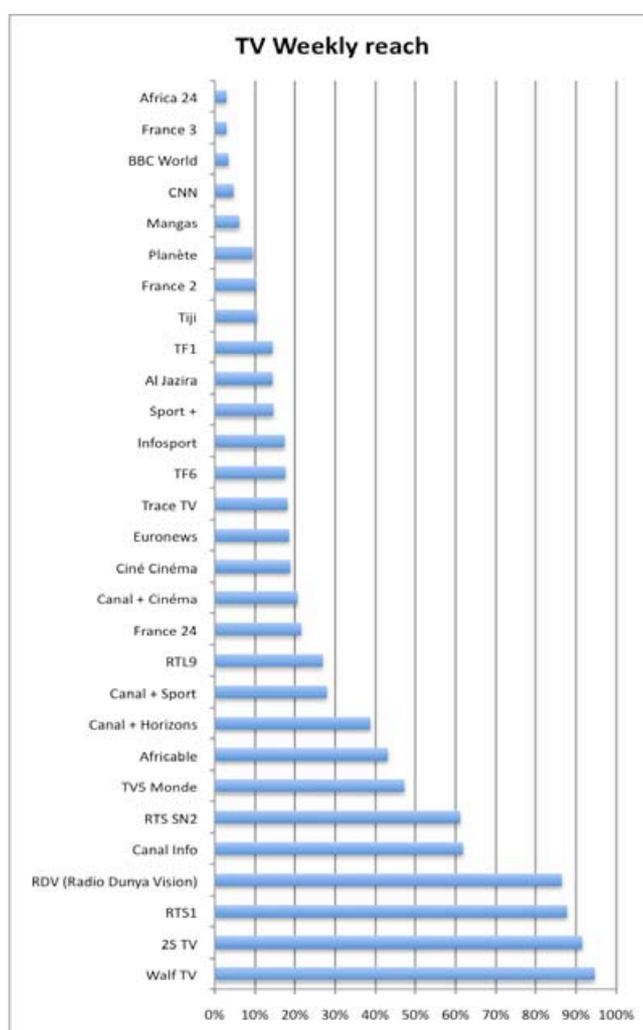


Figure 3.22: Weekly reach of television channels, Dakar, Senegal (Source: Africascope 2009, Dakar March 2009, TNS SOFRES. Base: Population 15+ – All respondents/Universe = 1,473,000).

However, most Senegalese viewers prefer to watch the national channels as they are accessible and people don't need to pay for them. The data analysed does not allow conclusions with regard to whether international providers have improved their position or not. However, since private channels are seen by many as a healthy balance to the state-owned RTS and many of the international providers are only accessible by subscription, on balance (with a few exceptions such as TV5 Monde) it seems that these channels have taken a niche market place commonly occupied by international channels in more restricted media environments. It seems, however, that international providers are perceived by those using them as an important supplement, giving profound and detailed objective international information in times of international crises or national tensions.

In our fieldwork, it emerged that many viewers, as in other countries, believe that the way international providers report on Africa is negative and biased by a European or Western view. International channels are not seen as 'home-grown' or 'close by' and therefore are generally less trusted than private channels.

3.5 Cameroon

Section summary

Cameroon has a tightly controlled media environment. State-run CRTV operates national television and radio networks and provincial radio stations. State television's monopoly was broken with the arrival in 2001 of TV Max, Cameroon's first private television station. Radio Nationale CRTV is the most widely recognised and used radio broadcaster and encompasses a wide network of local and regional FM stations. Dozens of private radio stations sprang up following a liberalisation of telecommunications in 2000, yet most of them operate outside the law because of high licensing fees and are therefore subject to closure at any time. Today, private radios compete strongly with CRTV at regional level. International radio stations and television channels are very popular, particularly French stations such as RFI on the radio, or France 24, TV5 or Euronews. On balance, due to tight regulations, state-run CRTV has a strong position in the market. International and pan-African television channels are highly popular. Private domestic television channels are highly popular but are struggling to survive. Private domestic radio stations provide stiff competition to the state-run CRTV radio network at a local and regional level, as do international and pan-African radio stations.

In a study carried out by France 24 in 2009, more than half of the people interviewed indicated that they would first turn to Cameroonian private television to learn about

events in Cameroon, followed by Cameroonian radio. 51% of the participants would turn to international television stations to access news about the world, followed by 25% who would access international radio (see Table 3.3). Hardly any of the participants indicated that they would turn to Cameroonian state television to learn about any news. While only 4% of the participants stated that they would access international television for news about Cameroon, 25% indicated that they would access international television for news about Africa.

	<i>Media first turned to when a news event occurs ...</i>		
	<i>in Cameroon (% of total)</i>	<i>in Africa (% of total)</i>	<i>in the world (% of total)</i>
Cameroonian radio	16	4	2
International radio	12	36	25
Cameroonian print	2	1	0.3
International print	0.1	1	0.4
Cameroonian state TV	7	4	2
Cameroonian private TV	58	28	18
International TV	4	25	51
Internet	0.3	1	1

Table 3.3: Media first turned to for current affairs and news, Cameroon (Source: Africascope 2009 Douala / Yaounde, December 2008 – TNS SOFRES; Base: Population 15+ All respondents, Universe = 2,237,000; France 24).

Nearly the same percentage of people, 28%, indicated that they would access Cameroonian private television to learn about events in Africa. While – perhaps not surprisingly – a majority of people access domestic private channels for national news, and a small majority accesses international providers for international news, international radio is the unlikely medium accessed for transnational news about Africa (followed by Cameroonian private and international television). The appeal of international radio seems remarkable, and may partly be linked to the popularity of international stations such as the French station RFI and the pan-African station Africa No. 1.

Radio consumption in Cameroon

Radio is the most important medium for most of the population (Mbaktu, 2005; Freedom House Index, 2009⁴⁵) and dozens of private radio stations sprang up following a liberalisation of telecommunications in 2000 (BBC Monitoring, 2010⁴⁶). Secessionists in the mainly English-speaking southern provinces have used pirate radio broadcasts to spread their message. BBC programming in English, French and Hausa is available across much of the country via FM relays (BBC Monitoring, 2010⁴⁷).

⁴⁵ Ibid.

⁴⁶ BBC Monitoring, 'Cameroon Country Profile', http://news.bbc.co.uk/1/hi/world/africa/country_profiles/1042937.stm#media 12 August 2010, accessed 20 August 2010.

⁴⁷ Ibid.

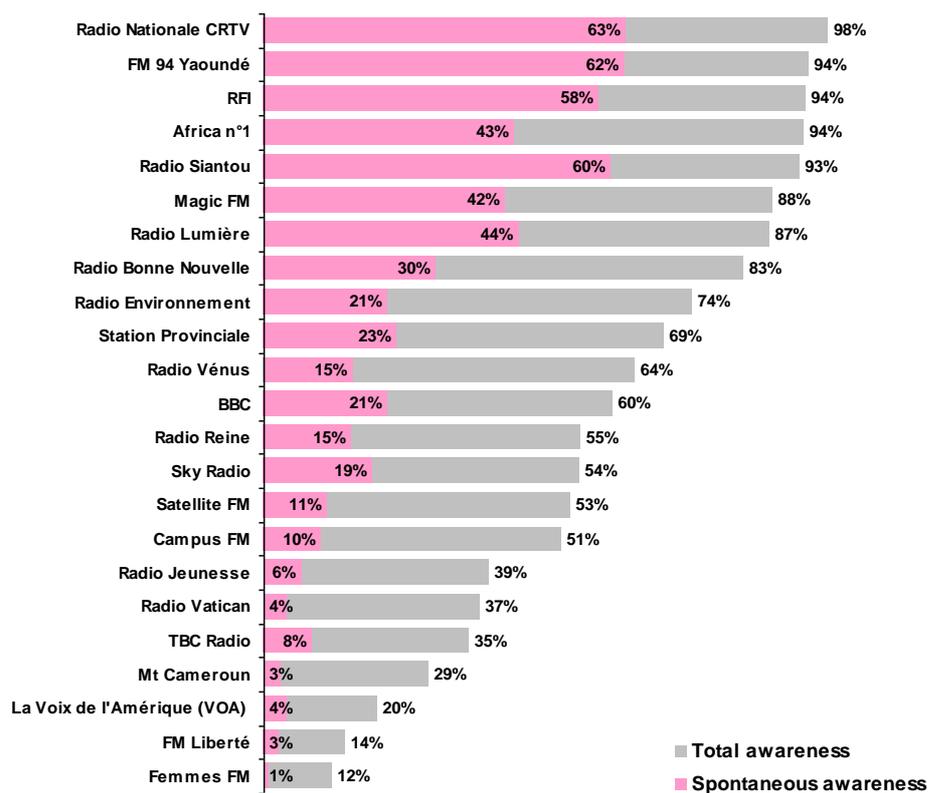


Figure 3.23: Awareness of radio stations, Yaoundé, Cameroon (Source: Africascope 2009 Douala / Yaounde, December 2008 – TNS SOFRES; Base: Population 15+ All respondents, Universe = 2,237,000; France 24).

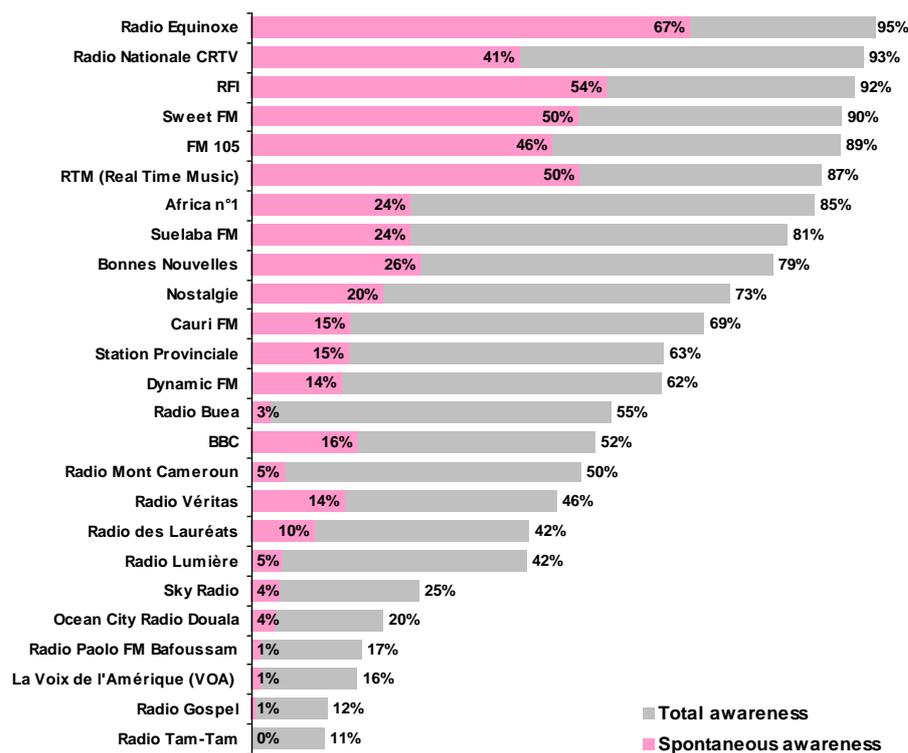


Figure 3.24: Awareness of radio stations, Douala, Cameroon (Source: *Africascope 2009 Douala / Yaounde, December 2008 – TNS SOFRES; Base: Population 15+ All respondents, Universe = 2,237,000; France 24*).

As Figures 3.23 and 3.24 indicate, perhaps not surprisingly given the government’s longstanding broadcast monopoly that was broken only in 2007, state-owned Radio Nationale CRTV is one of the most widely recognised stations both in Douala and Yaoundé (Africa Scope 2009). RFI, Africa No. 1 and the BBC are the most widely known international broadcasters in these cities. Radio Nationale CRTV has with 64.9% the widest weekly reach in Yaoundé (Figure 3.25) followed by the state-owned commercial station FM 94 Yaoundé. However, in Douala, private radio stations such as Radio Equinoxe and Sweet FM have the widest weekly reach (Figure 3.25). The French broadcaster Radio France Internationale (RFI) is reaching weekly 52.2% in Yaoundé and 53.5% in Douala, compared to other international broadcasters such as Africa No. 1, a pan-African broadcaster⁴⁸ which reaches weekly 37.6% in Yaoundé and 27.2% in Douala, and the BBC, which reaches weekly 17.1% in Yaoundé and 15.4% in Douala.

⁴⁸ Africa No. 1 is a pan-African broadcaster that was founded in 1981 in the Republic of Gabon. It claims to reach daily more than 30 million listeners worldwide. From: <http://www.africa1.com/spip.php?rubrique26> , accessed 7 June 2010.

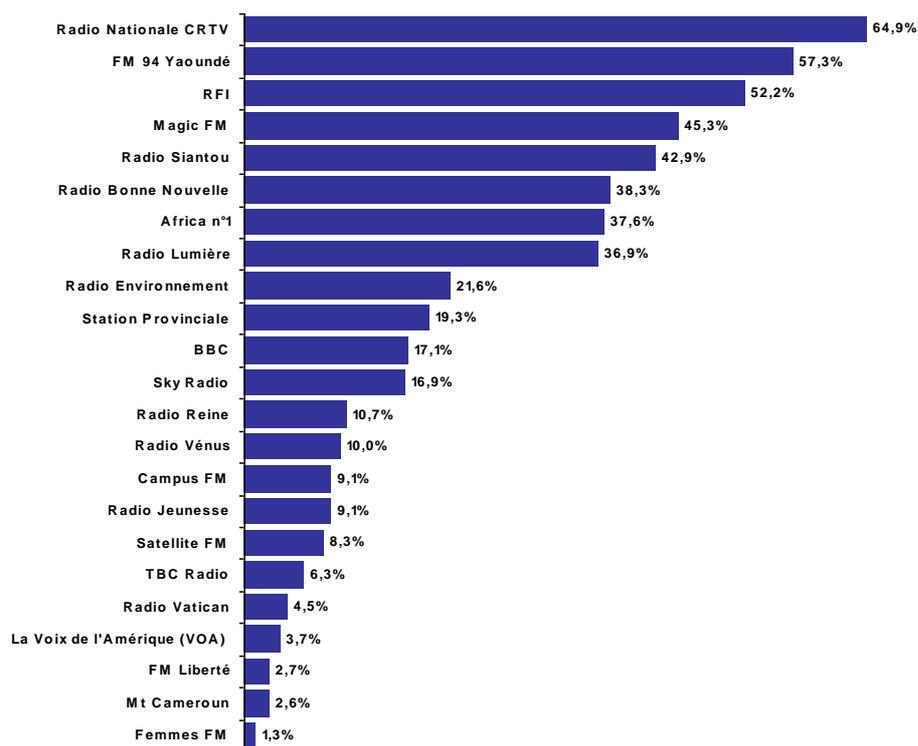


Figure 3.25: Weekly reach of radio stations, Yaoundé , Cameroon (Source: Africascope 2009 Douala / Yaoundé, December 2008 – TNS SOFRES; Base: Population 15+ All respondents, Universe = 2,237,000; France 24).

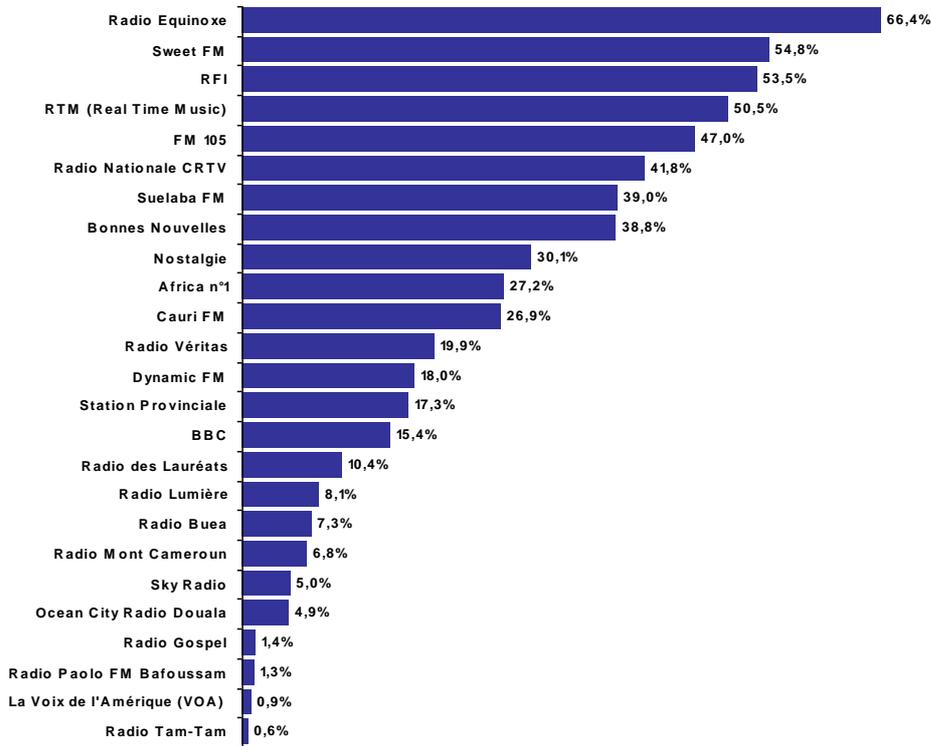


Figure 3.26: Weekly reach of radio stations, Douala, Cameroon (Source: Africascope 2009 Douala / Yaoundé, December 2008 – TNS SOFRES; Base: Population 15+ All respondents, Universe = 2,237,000; France 24).

The popularity of these stations is further reflected in the daily reach, which shows a very similar ranking, but puts RFI with a daily reach of 27.6% in second place just behind the Radio Nationale CRTV in Yaoundé, and behind Radio Equinox in Douala, where RFI reaches 22.4% on a daily basis. The daily reach of the BBC is at around 4% in both cities.

Television consumption in Cameroon

The government's television monopoly was broken with the arrival in 2001 of TV Max, Cameroon's first private television station. Today, there are, besides the satellite stations, already more than 15 private television stations and the number is steadily increasing. Canal 2 is most widely recognised by consumers, according to findings of a survey of France 24 in 2009 (Figure 3.27), followed by the state-owned CRTV. French and European channels such as TV5 or Euronews are widely recognised, too.

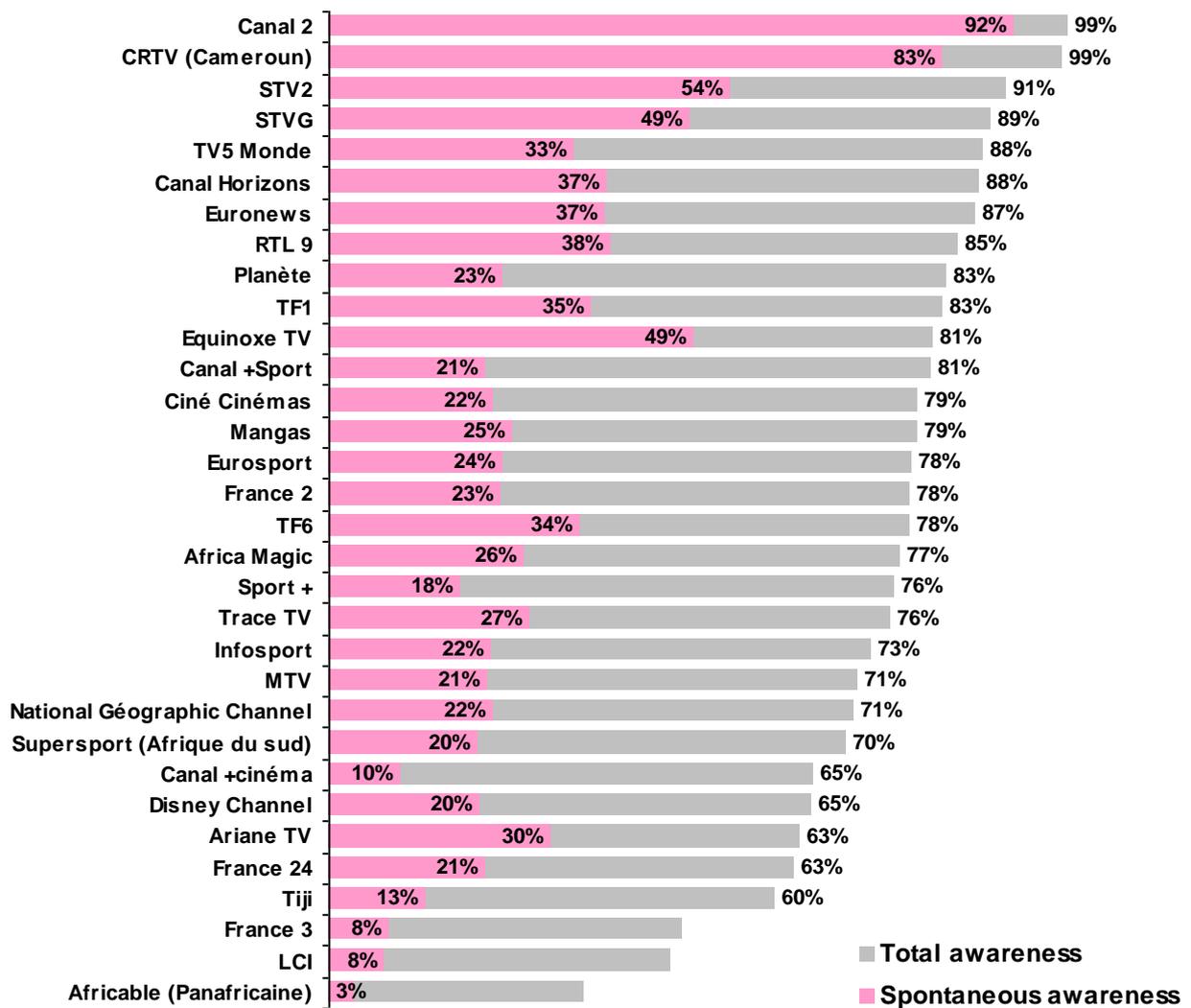


Figure 3.27: Awareness of television channels, Douala / Yaoundé, Cameroon (Source: Africascope 2009 Douala / Yaoundé, December 2008 – TNS SOFRES; Base: Population 15+ All respondents, Universe = 2,237,000; France 24).

As Figure 3.28 illustrates, Canal 2 is with a weekly reach of 94% the most successful television station, followed by the state-owned CRTV (67%). Euronews is the most successful international broadcaster, reaching weekly 48%, followed by the French TF1 (43%).

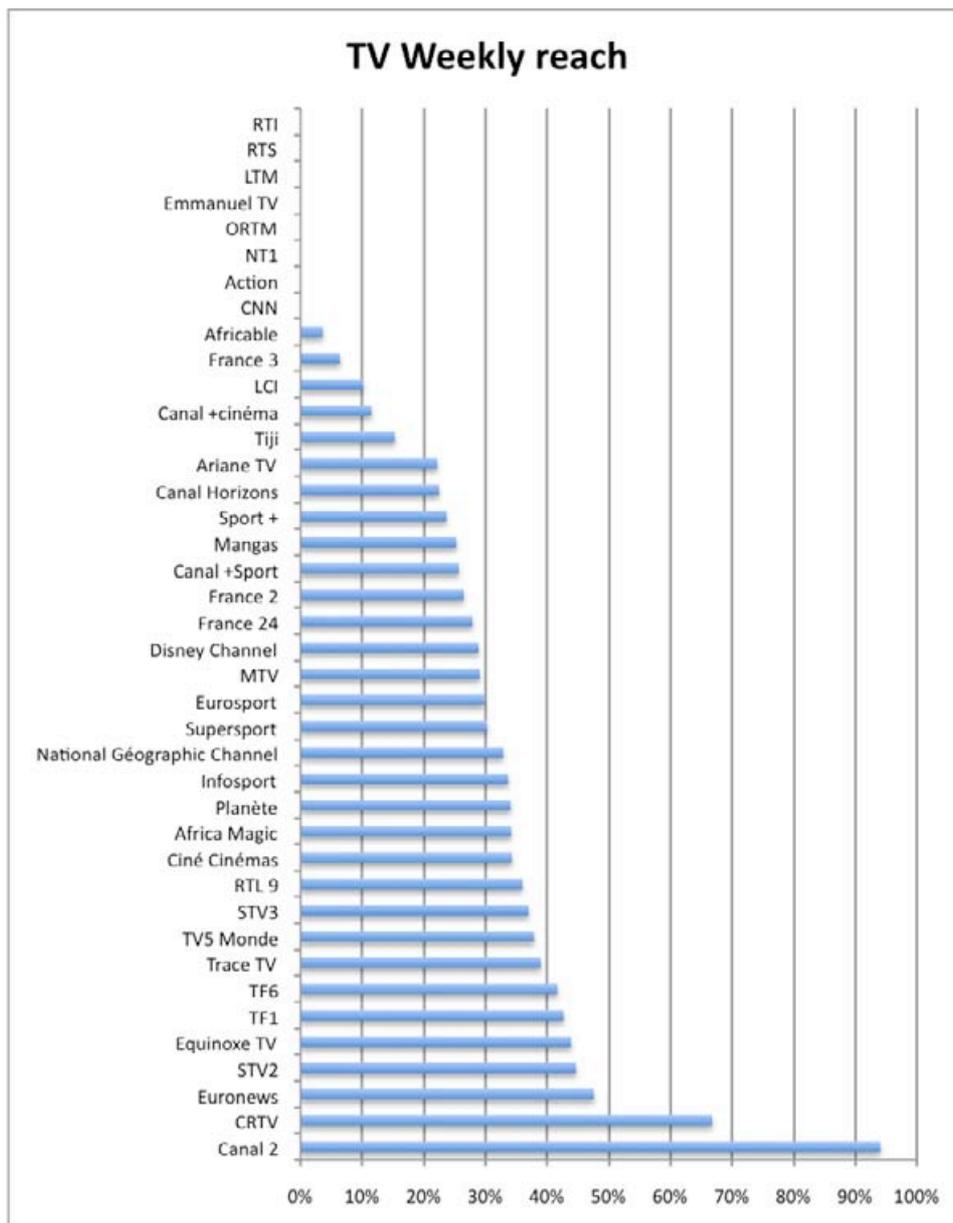


Figure 3.28: Weekly reach of television channels, Douala / Yaoundé, Cameroon (Source: *Africascope 2009 Douala / Yaoundé, December 2008 – TNS SOFRES; Base: Population 15+ All respondents, Universe = 2,237,000; France 24*).

While radio is more widely used in Cameroon, international and private television channels are popular, too, particularly in urban areas. It is difficult to judge whether this popularity is a consequence of the relatively recent liberalisation of the television market, or whether this is a necessity brought about by a restrictive environment that encourages people to watch broadcasts of international providers in order to get a more objective and reliable view of unfolding events both within and outside Cameroon.

3.6 Kenya

Section summary

Kenya enjoys a relatively free media environment. The main providers are the state-owned television channels KBC, as well as the private KTN, NTV (Nation TV) and Citizen TV. Most of these privately owned channels also hold stakes in the radio and the newspaper business. While international providers are seen by consumers as essential as they offer an alternative view to the national media which is less biased, the consumption of international media generally has gone down, particularly for radio, though the figures presented here show that the BBC remains the leading international provider. The steep increase of vernacular radio stations in the past few years and only limited media regulation and monitoring of media are seen by some as potentially fostering underlying ethnic tensions. International television providers are mainly used by the middle and upper classes as access is costly. As of 2009, CNN, BBC World and Al Jazeera were the most popular international providers in Kenya. Al Jazeera seems to be one of the very few international television channels that is consumed by all classes, partly because it is free-to-air for nearly 24 hours a day, while other internationals, such as CNN or France 24, rely on partner stations such as the state-owned KBC (France 24) or KTV and NTV (CNN), which air the international broadcasters at often unpopular times. While the television market is dominated by English and Kiswahili providers, the radio market is dominated by many vernacular stations, reflecting the ethnic and cultural diversity of Kenya. Regional providers are very strong and colonial providers are viewed with some scepticism.

Kenya is an ethnic melting-pot, with 42 different ethnic tribes, immigrants from Somalia and many citizens of South Asian heritage. This ethnic diversity is strongly reflected in media consumption habits and, at times, loyalty to certain media outlets owned by people of the same tribe. Television, radio and mobile phones are by far the most frequently owned and used media in Kenya. Considerable differences in ownership and usage exist between geographical regions. As Figure 3.29 illustrates, radio and, to a slightly lesser degree, mobile phones are the most frequently owned media appliances in rural and urban areas. Television ownership has increased substantially over the past few years, is at 34.5% on a national level, and as high as 77.3% in Nairobi (IBB, 2009⁴⁹). Access to cable or satellite television has grown from 24% to 42% (BBC, 2009), although only 1.4% of the satellite television viewers nationally have access at home, compared to 8.3% of satellite television viewers in

⁴⁹ IBB (2009), [Broadcasting Board of Governors] 'International Audience Research Project – IBB New Media Technologies Study: Kenya', February–March 2009.

Nairobi (IBB, 2009) (we assume that the remaining 41.6% watch satellite television outside their homes). Generally, satellite television is out of the financial reach of most Kenyans, and the availability of cable television is very limited (BBC, 2008⁵⁰).

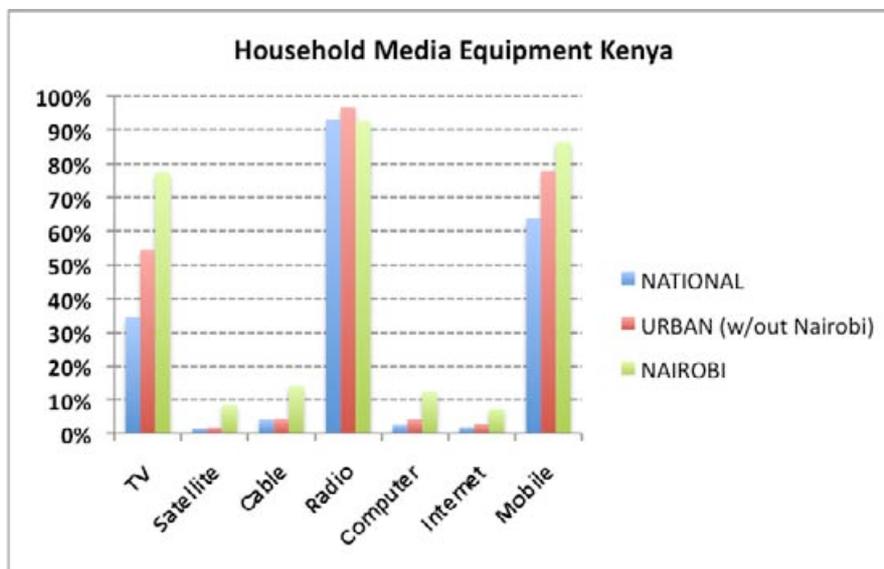


Figure 3.29: Household media equipment, Kenya (Source: Intermedia National Survey Kenya 2009).

There exists a marked difference in accessibility and usage between radio and television in rural areas as well as urban areas. According to a BBC survey, 87% of Kenyans access the news daily, with 4% accessing it on an hourly basis. Most Kenyans rely on the broadcast media, particularly radio, for news (BBC, 2009⁵¹). As the following figure indicates, most Kenyans access the news via radio, television and indirectly through chatting with friends and family.

⁵⁰ BBC, 2008, 'Kenya's vibrant and critical media', <http://news.bbc.co.uk/1/hi/world/africa/7171372.stm> 4 January 2008, accessed 24 August 2010.

⁵¹ BBC 2009, 'Kenya – Performance at a Glance', April 2009, Source: BBC GND/IPSOS.

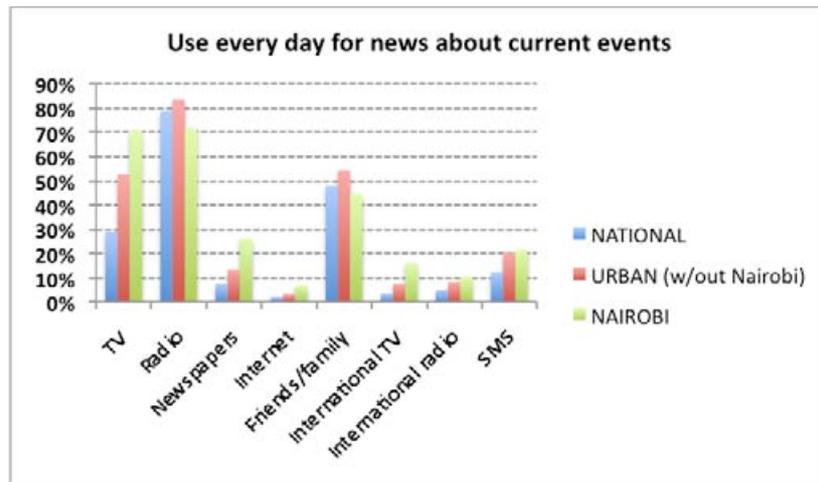


Figure 3.30: Media used daily for news about current events, Kenya (Source: Intermedia National Survey Kenya 2009).

Findings from the National Survey in Kenya in 2009 suggests that interest in domestic news dominates (Figure 3.31), and a survey by the BBC in 2009 found that the number of people saying they were extremely interested in regional and international news was at its highest level since 2003.⁵²

⁵² However, these findings may have been biased due to the US elections taking place at the time of the survey research, which is likely to have boosted interest in international news. Also, around the same time, the Waki report was released, which received a lot of press (the Waki commission was charged with investigating post-general election violence in the aftermath of the Kenyan elections of December 2007) (BBC, 2009).

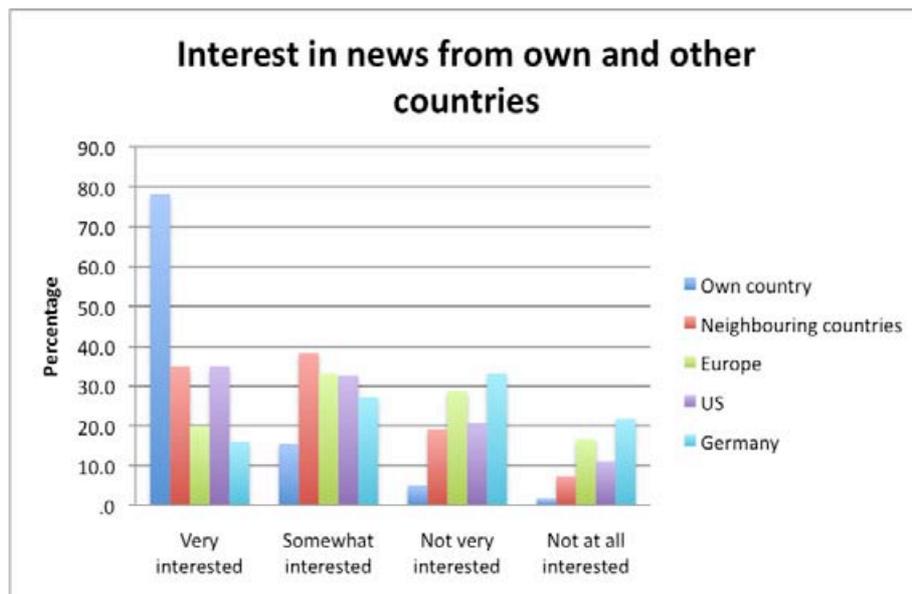


Figure 3.31: Interest in news from own and other countries, Kenya (Source: Intermedia National Survey Kenya 2009).

Ratings for most international broadcasters continue to be much lower than in other African countries. Figure 3.32 indicates a high level of use of the BBC, but most of the international providers in Kenya, with the exception of VOA, have not gained audience share over the past three years, while the domestic media seem to have maintained their audience numbers or even gained new audiences. This trend seems to have started around 2005 and 2006, when there was a big move to associate with anything Kenyan (BBC, 2009).

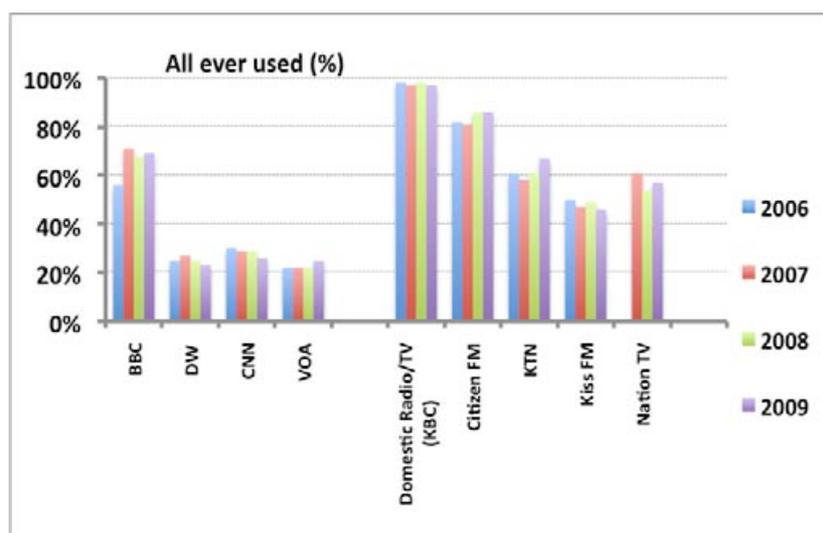


Figure 3.32: Broadcasters ever used , Kenya (Source: BBC 2009).

Being easy to understand has become a crucial requirement of news providers (BBC, 2009) – a trend that is reflected in the increased audience figures for vernacular radio stations, as the next section outlines.

Radio consumption in Kenya

According to a BBC survey (BBC, 2009), the Kenyan media market has been dominated by radio over the last few years and continues to be so, with 92% of adults listening weekly to the radio. Of the total audience, 8% listen to the radio via a mobile phone – a proportion that is set to increase over the next few years with falling mobile phone service costs (BBC, 2009). In the south-western province of Nyanza and in Nairobi the percentage of people listening to the radio via mobile phones is particularly high. Nairobi also has a high prevalence of people listening to the radio via internet (BBC, 2009). Figure 3.33 shows the top six radio stations in Kenya.

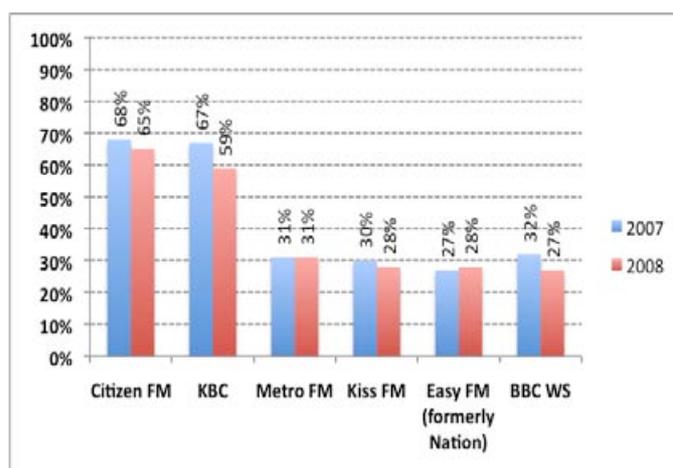


Figure 3.33: Weekly use of radio stations, Kenya (Source: BBC 2009).

Citizen FM, KBC, Metro FM, Kiss FM and Easy FM (formerly Nation) are the main domestic stations in Kenya. Domestic radio stations continue to dominate, and there have only been slight fluctuations in weekly listening, despite a general trend of a decline in radio audiences. The biggest drop among domestic broadcasters in 2008 was reported for KBC, which experienced a decline in its audience of 8% since 2007 (Figure 3.33) (BBC, 2009). Audiences for Kiswahili stations have fallen, with listeners switching to local vernacular stations. For example, the BBC Swahili audience among Kalenjin speakers has fallen from 46% listening weekly to 27%. Meanwhile, stations that broadcast in vernacular languages, such as Change FM (a Kalenjin station), have seen an increase in their audience, with Change FM growing from 80% to 86% in 2008 (BBC, 2009). This shift has happened as these local vernacular

stations are often closely affiliated with local tribes and tend to reflect their political views. Citizen FM was in 2009 the most popular radio station in most of rural Kenya (BBC, 2009). Some of the other FM stations can be heard in the country, but they often play pop music, urban hip-hop and discussions on issues that do not necessarily resonate with the millions of listeners in rural Kenya. This has given Citizen FM, which also reports on criticism of the government, the advantage in filling the gap in the rural market. In addition, Citizen FM's radio signal is clearer than that of its main competitor, KBC (in English and Swahili) which has a similar reach nationally (BBC, 2009). Finally, Citizen FM's increased popularity potentially can also be traced back to a change in its staffing structures: in the past, the firm mainly hired staff from central Kenya (i.e. from the Kikuyu tribe), an approach that has changed over the years and led to the hiring of many well-known journalists from respected media houses and different ethnic backgrounds. This change is reflected in an increased level of impartiality of its stories.⁵³

Against this background of the growing popularity of vernacular stations, international radio stations are fighting to keep their audiences. BBC WS weekly audiences have fallen by 5.1% from 2007 to 2008, reaching 27.4% of adults weekly (some 6 million adults) (BBC, 2009). Listening in Swahili has dropped by 4.2% from 2008 to 2009 (global audience estimate) and by a further 1.8% to 22.5% (i.e. 5.1 million of a total population of 22.5 million). Meanwhile, the BBC's English audiences remained stable from 2007 to 2008, which may be linked to an increase in the number of partner stations. For the BBC, FM remains the key medium for delivery: 47% of weekly listeners listen on FM relays, 32% on partner stations and 31% on SW. SW listening is more likely to be done in Swahili than English and is highest in the Nyanza region. While listening via FM and SW has fallen in Kenya from 2008 to 2009, audiences listening via partners have stayed steady (BBC, 2009). Voice of America saw an increase of its audience figures from 7% to 9% in 2008. This growth is down to VOA's partners, which account for 52% of weekly listening (up from 41% in 2007). VOA has new partnerships with Radio Lake Victoria in Kisumu and Frontier FM in Nairobi and in 2008 co-produced a US election night special with Citizen FM. Meanwhile, Radio China has seen its audience more than halve, its reach dropping from 17% to 8% listening weekly (BBC, 2009).

⁵³ According to BBC Monitoring, explanations that can account for the plummeting of the station around 2003-2006 was the perception that it was a pro-Kibaki, and therefore a pro-Kikuyu station (Kibaki has been president since 2003). During the November 2005 constitutional referendum Citizen FM was accused of ethnic bias, targeting only central Kenya, and that it was pro-Kibaki in its reporting. Since then it has diversified and now covers various issues (BBC Monitoring, 26 April 2010).

Television consumption in Kenya

In Kenya 58% of adults watch television weekly (BBC, 2009). The main peak in viewing is in the evening between 7 and 9 p.m. Domestic channels are very popular and frequently watched (Figure 3.34). The state-owned broadcaster KBC, whose Channel 1 claims to cover 90% of the country, is widely seen as the mouthpiece of the government. However, in the 2009 National Survey in Kenya, 64% of respondents said they had watched KBC 1 in the last 12 months. KBC Channel 2 targets urban viewers with an entertainment-based format (BBC, 2008). In 1990, Kenya Television Network (KTN) became the first station to break the state broadcasting monopoly. It turned out to be popular among consumers in our fieldwork carried out in July 2010 in Nairobi, as its lively style contrasts strongly with KBC's output. In the Kenya National Survey 2009, 48% of respondents indicated that they had watched KTN in the last 12 months. But while KTN is highly popular in urban areas, most of the country is out of the range of its signal (BBC, 2008).

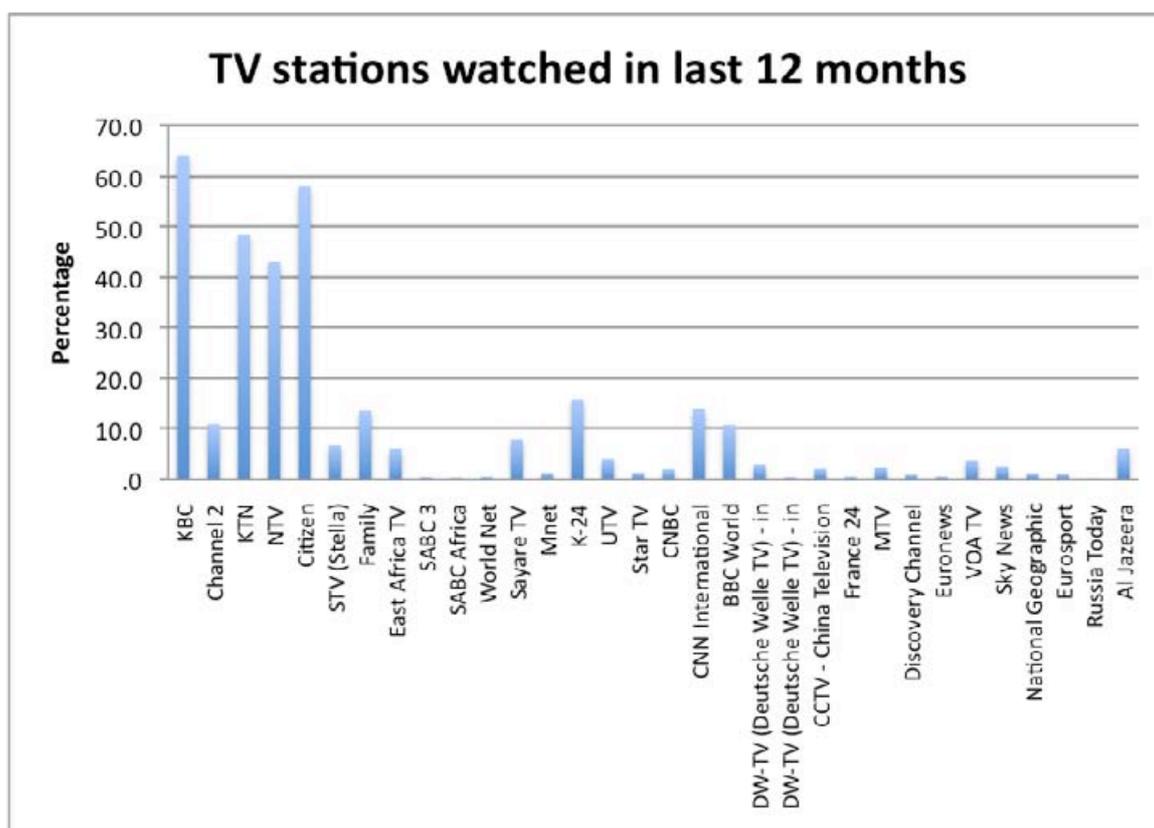


Figure 3.34: Television channels watched in last 12 months, Kenya (Source: Intermedia National Survey Kenya 2009).

Despite its near nation-wide coverage, KBC saw audience figures fall in 2008 and 2009 but it remains the most watched broadcaster, with 42% watching weekly (down

from 46% in 2007) (BBC, 2009). Citizen TV has increased its viewership from 32% in 2007 to 40% in 2008 (BBC, 2009). Nation TV (now NTV), which launched in 1999, was one of the most popular channels in our focus groups, together with the highly popular Citizen TV, which targets rural Kenya but was associated with a pro-government stance in the past (both Citizen TV and Citizen FM belong to the same media group) (BBC, 2008). Privately owned K24 launched in November 2007 and took on a pro-government stance. It positions itself as a 24-hour news and features channel. While many of these domestic channels are highly popular, international channels are watched to a much lesser degree, partly because they are not easily accessible. BBC World News maintained its audience in 2007 and 2008 at 11% of adults watching weekly (BBC, 2009). BBC World News was mainly viewed on a local partner channel, with only 28% of viewers watching on the BBC World News channel directly. The BBC used to be aired by the state-run KBC channel in the past, a slot that is now taken by France 24. Meanwhile, the popular domestic channels KTN and NTV air CNN, while Citizen TV airs Al Jazeera. According to BBC figures (BBC 2009), CNN's audience remained stable from 2007 to 2008, having 11% of adults watching it weekly. Al Jazeera English, Sky News and DW TV have all seen a slight decrease in their audience figures, while VOA saw a slight growth in its audience in 2008.

3.7 Nigeria

Section summary

Nigeria is the most populous African country. It has a vibrant and diverse media environment, but state control and tough legislation make it difficult for international broadcasters to compete with the many domestic broadcasters. The state-run NTA is the dominating force in the Nigerian media market, but private domestic broadcasters have become strong competitors in recent years. International providers such as the BBC Hausa Service are trusted and popular. CNN International and BBC World are the main international broadcasters competing for audience shares in the biggest African country. On balance, Nigeria is a competitive environment, with a strong and lively domestic media landscape. While state-run and private domestic providers both for radio and television are popular and successful, international broadcasters enjoy popularity, too, albeit to a lesser degree. The data analysed does not allow for conclusions on whether the consumption of content from international providers over the past few years has gone up or down.

Nigeria has a comparatively liberal and highly vibrant media environment. State radio and television have near-national coverage and operate at federal and regional

levels. All 36 states run their own radios, and most of them operate television stations. Findings of the Nigerian National Survey 2009, a study carried out by Intermedia, suggest that Nigerians are generally very much interested in news of their own country, and, to a lesser degree, in international news (Figure 3.35).

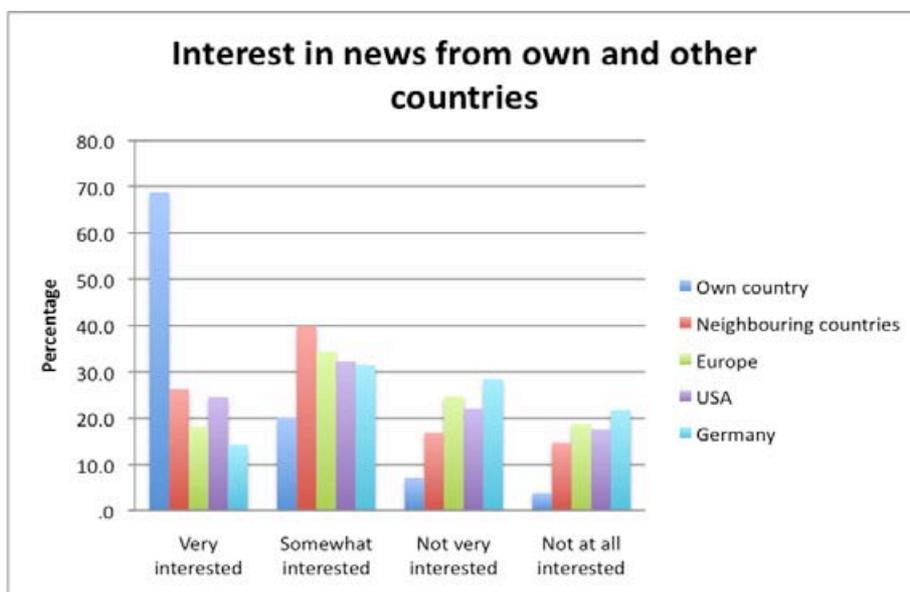


Figure 3.35: Interest in news from own and other countries, Nigeria (Source: Intermedia National Survey Nigeria 2009).

While 91.7% of the respondents in the Nigerian National Survey 2009 indicated that they had a working radio in their household, only 58.2% had a working television in their house.⁵⁴ Unsurprisingly, radio is the most frequently used medium in Nigeria and was used every day by more than half of the participants in the National Survey 2009 (Figure 3.36).

⁵⁴ This is at variance with the figure of 25% provided in Table 2.2 above. We assume that the Intermedia survey is the more reliable source.

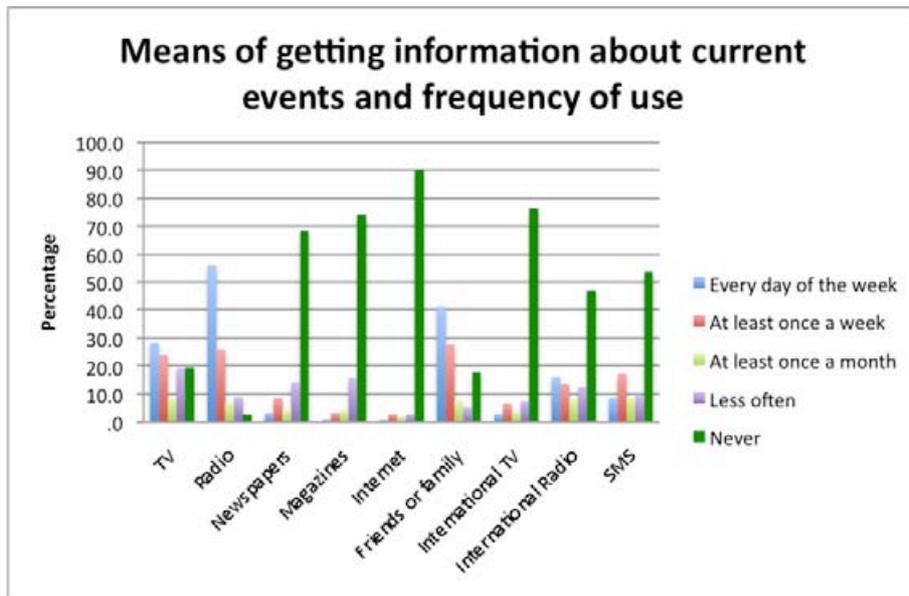


Figure 3.36: Use of sources of information about current events, Nigeria (Source: Intermedia National Survey Nigeria 2009).

Radio consumption in Nigeria

Federal Radio Corporation of Nigeria (FRCN) is the state-run radio broadcaster that operates Radio Nigeria stations in Abuja, Lagos, Ibadan, Kaduna and Enugu. For the Nigeria National Survey 2009 sample, the private domestic station Freedom FM was the most popular station, followed by FM Kano (Figure 3.37).

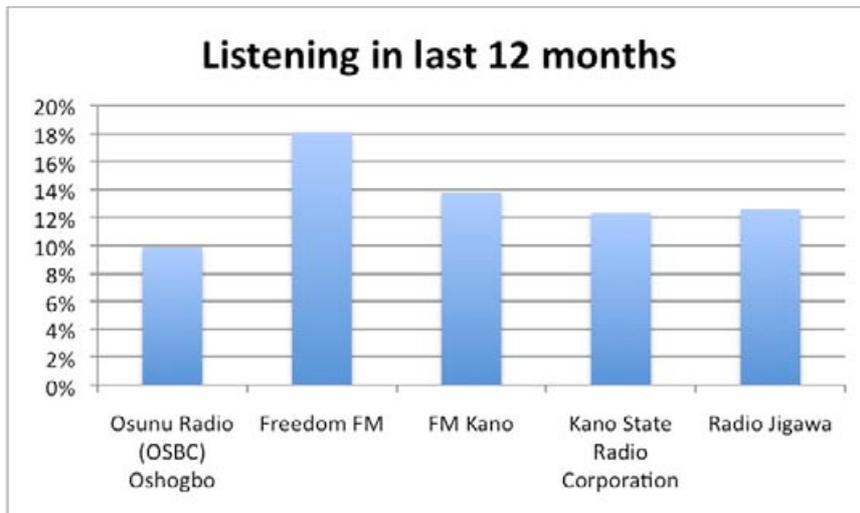


Figure 3.37: Radio stations listened to in last 12 months, Nigeria (Source: Intermedia National Survey Nigeria 2009).

In terms of international stations, the BBC, VOA and Deutsche Welle are among the most popular stations, with the greatest awareness of the BBC, and these were the three stations of which most consumers were aware of in the Nigerian National Survey 2009 (Figure 3.38).

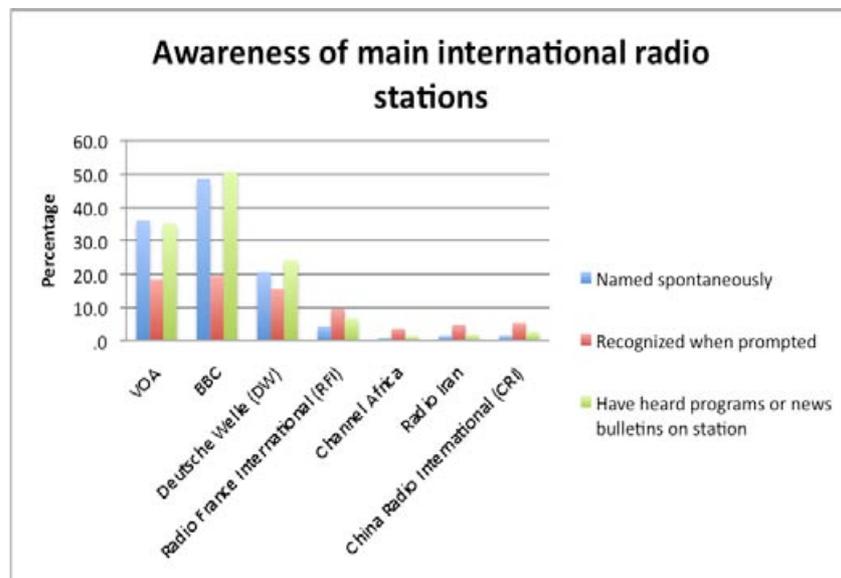


Figure 3.38: Awareness of main international radio stations, Nigeria (Source: Intermedia National Survey Nigeria 2009).

Broadcasts of international stations, particularly the BBC Hausa service, are highly popular (Figure 3.39), but rebroadcasts of foreign stations are banned (BBC

Monitoring, 2010⁵⁵). This popularity and trust in international providers is particularly important for consumers in times of national crises and political tensions, as became evident shortly before the death of the late President Umaru Yar'Adua. President Umaru Yar'Adua, after speculation about the state of his health, chose the BBC Hausa service to address these speculations in an exclusive interview (BBC, 2010⁵⁶). This interview subsequently played a central role in the country's constitutional debate (Horrocks, 2010,⁵⁷ see also Rotheray, 2010).

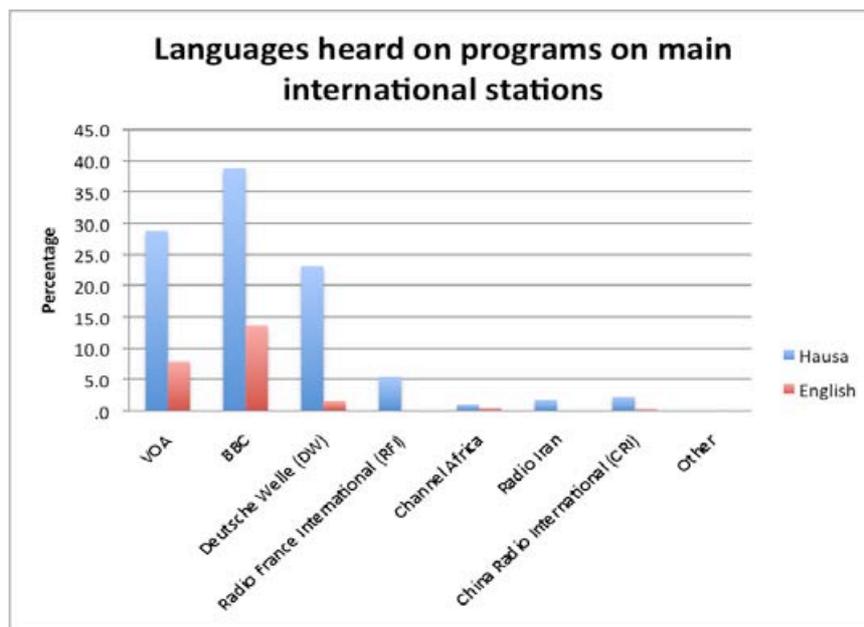


Figure 3.39: Languages heard on international radio stations, Nigeria (Source: Intermedia National Survey Nigeria 2009).

⁵⁵ BBC Monitoring, 'Nigeria Country Profile', http://news.bbc.co.uk/1/hi/world/africa/country_profiles/1064557.stm#media, 6 May 2010, accessed 20 August 2010.

⁵⁶ BBC, 2010, 'BBC Hausa interview with President Yar'Adua', http://www.bbc.co.uk/blogs/theeditors/2010/01/bbc_interview_with_president_y.html, 12 January 2010, accessed 17 September 2010.

⁵⁷ Horrocks, P. (2010), 'BBC World Service – Rising to the global challenge', http://www.bbc.co.uk/worldservice/lg/institutional/2010/06/100626_annual_review_2010_global_challenge.shtml, accessed 31 July 2010.

Television consumption in Nigeria

The state-run Nigerian Television Authority (NTA) operates scores of national and regional stations, and national services generally broadcast in English.

Private television stations have been licensed, and there is substantial take-up of pay-TV. However, as in other markets explored in this study, private television channels are dogged by high costs and scarce advertising revenues, and legislation requires that locally made material must comprise 60% of output. Viewing is mostly concentrated in urban areas (BBC Monitoring, 2010). Some of the main private domestic channels are AIT, which broadcasts in Lagos, Abuja and internationally via satellite; Minaj TV, which broadcasts in eastern Nigeria and via cable or satellite; Silverbird TV, which broadcasts in Lagos and Port Harcourt; and Galaxy TV, which broadcasts in Western Nigeria.

As findings from the National Survey of 2009 in Nigeria further suggest, international channels are popular, though not as popular as some of the domestic channels. However, particularly CNN International and BBC World News enjoy popularity and dominate among the international providers in the Nigerian media market (Figure 3.40).

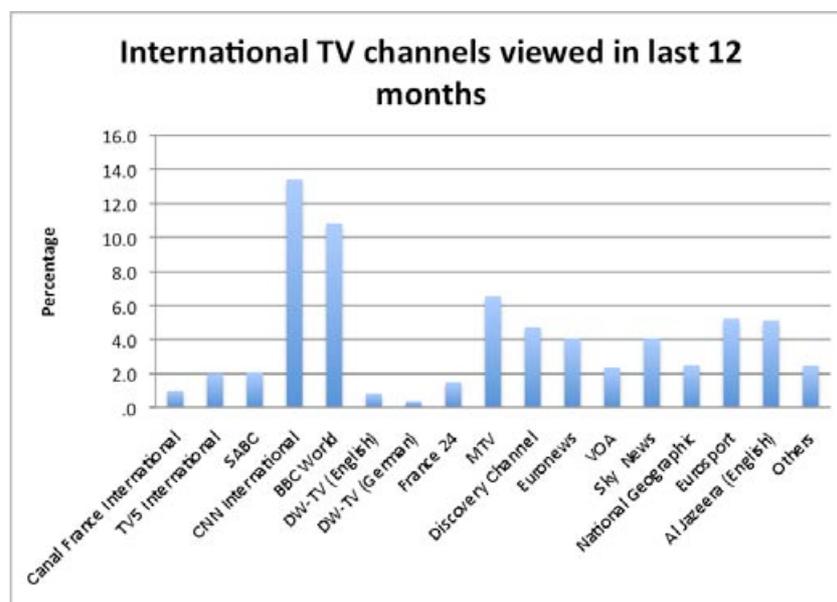


Figure 3.40: International television channels watched in last 12 months, Nigeria (Source: Intermedia National Survey Nigeria 2009).

3.8 India

Section summary

India has a very lively and diverse, autonomous media market that is difficult for international broadcasters to tap into. While music-based FM stations are highly popular, only the public radio station All India Radio can broadcast news. Television is the most popular media in India, and private domestic television channels both in Hindi as well as English enjoy great popularity. However, the top channels with the widest reach are mostly Hindi news channels. The distinction between news and entertainment on most domestic channels is often blurred, and many consumers complain about the 'sensationalist' tone of some of the content of domestic providers. The Hindi 24-hour news channel Aaj Tak reaches most people. The public broadcaster Doordarshan is perceived as boring by many, but has a wide reach. The two main international providers are BBC World News and CNN I, which are more or less equal in terms of weekly or even monthly reach. On balance, domestic private channels are the strongest providers in the market, both for television and for radio. International providers are seen as setting the gold standard for domestic providers by many, but are viewed with some scepticism.

Of the eight media markets studied in this project, India is probably the most complex. This complexity is based on a multi-layered distribution system in the broadcast sector, and is further complicated by a hardly legislated media environment. As Kohli-Khandekar describes:

'While there are several regulatory issues, most of them stem from one single factor – ad hocism. Media regulation is dependent on the moods of the government of the time. While TRAI, the broadcast regulator, comes up with some of the finest consultation papers and recommendations on issues to do with broadcasting, the Ministry of Information and Broadcasting (MIB) either pays no attention to them or often changes them beyond recognition. There is no overarching legislation that evens out the playing field, either in terms of investment or technology norms, for segments across the broadcasting value chain.'

(Kohli-Khandekar, 2010, pp. 59ff.)

The Indian broadcast market has experienced unprecedented growth over the past few years and new private television channels have proliferated since the state television monopoly was broken in 1992. Their number is still growing. By 2009, 461 channels were operating, of which 44 broadcast in English (FICCI-KPMG, 2010). This *de facto* makes India one of the world's largest English-language television markets. Media are generally widely trusted in India. Of a total of 229.3 million households in

India in 2008, 136.3 million had at least one television (Kohli-Khandekar, 2010). Television is by far the most frequently used medium, as findings of a survey carried out by the BBC in 2009 confirmed (Figure 3.41).

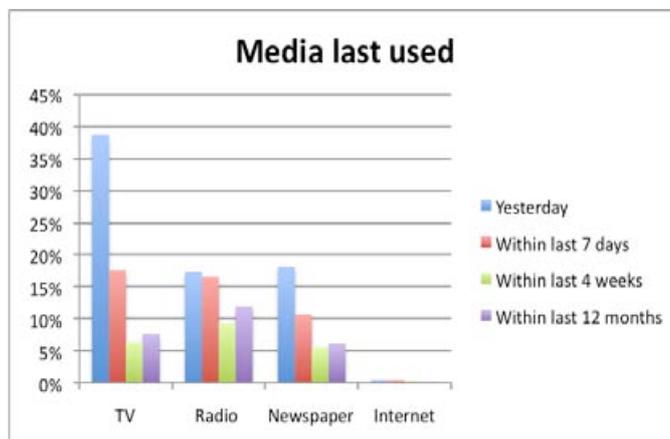


Figure 3.41: Media last used, India (Source: BBC 2009).

Indians are avid news consumers, and many people access news media at least once a day (Figure 3.42).

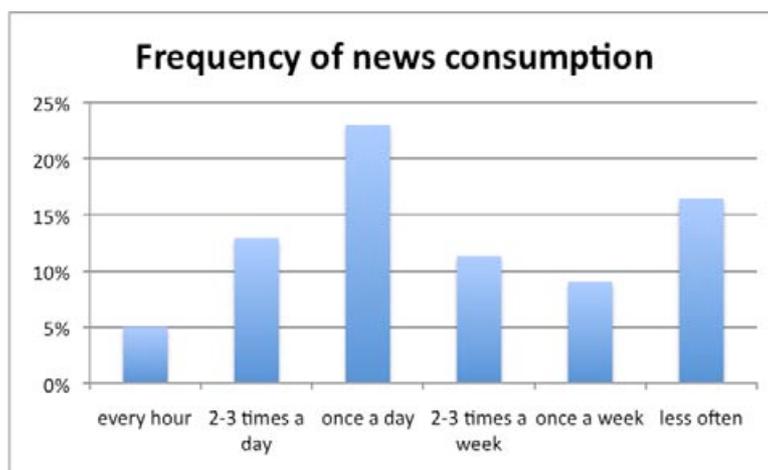


Figure 3.42: Frequency of news consumption, India (Source: BBC 2009).

Yet, while Hindi news genres, business news and regional news genres have stayed stable or grown considerably over the past few years, as Table 3.4 details, English news genres have started to decrease since 2007 after a period of increase. However, overall, the total percentage of news genres compared to the overall programming genres is still comparatively small.

<i>TV programming genres</i>	2004 (%)	2005 (%)	2006 (%)	2007 (%)	2008 (%)
Business news	0.1	0.4	0.5	0.5	0.5
English news	0.3	0.3	0.5	0.7	0.6
Infotainment	1.2	1.0	1.0	1.0	0.8
Hindi news	3.7	4.2	4.5	4.8	4.8
Regional news	1.2	1.5	1.7	2.4	2.7

Table 3.4: Growth of television broadcasting, by programme genres, India) (Kohli-Khandekar, 2010, p. 71).

Radio consumption in India

Radio broadcasting in India started during British colonial rule, when the authorities allowed the establishment of an amateur radio club in 1924 in Madras (Viswanath and Karan, 2000). Therefore, historically, international broadcasting had a significant influence in India. For example, the BBC World Service enjoyed some of its largest audiences in the country. Since then, much has changed, and the media deregulation in the 1990s together with an increasing choice in the domestic market have led audiences for international radio broadcasters to melt away. While broadcasters such as Voice of America have dropped their broadcasting in Hindi completely, other international providers, such as China Radio International, Deutsche Welle, Voice of Russia and the Japanese radio external service continue to broadcast. The statistical data available does not allow us to draw conclusions on how well these international broadcasters are doing. Some of these operators will have small audiences, but BBC World Service radio still achieves considerable audiences.

The picture looks slightly different for private domestic providers. Since they were given permission to broadcast in 2000, music-based FM radio stations have flourished in urban areas and enjoy great popularity, judging by the comments in focus groups conducted in Mumbai during our fieldwork. Radio Mirchi, a commercial network with stations in Mumbai, Delhi and other cities, is one of the most popular stations in India, besides Radio City, a commercial news network run by News Corporation, and Red FM, a commercial station owned by the India Today

Group. These networks broadcast mainly music (BBC Monitoring, 2010⁵⁸). Yet current regulations do not allow a radio company to own more than one radio station in a city, which limits variety and competition (Kohli-Khandekar, 2010). Only the public broadcaster All India Radio can broadcast news on FM. However, it is expected, as with the changed regulation of music-based FM radio stations, that the government might lift the news ban in the near future (Kohli-Khandekar, 2010). All India Radio's monopoly on radio news broadcasting is an obstacle to international broadcasters in establishing rebroadcasts through local partners.

Television consumption in India

Private cable and satellite stations command large audiences. News programmes often outperform entertainment shows, although the intersection between the two is often blurred (Thussu, 2007). Many 24-hour news channels are up and running and more are planned (Table 3.5).

⁵⁸ BBC Monitoring, 'India Country Profile', http://news.bbc.co.uk/1/hi/world/south_asia/country_profiles/1154019.stm#media 7 June 2010, accessed 20 August 2010.

<i>Channel name</i>	<i>Language</i>	<i>Reach</i>
Star News	Hindi	International
NDTV 24 × 7	English	International
CNN/IBN	English	International
CNBC-TV18	English	International
Sun News	Tamil	International
Asianet News	Malayalam	International
TV9 News	Telugu	International
Tara Newz	Bangla	International
DD News	Hindi/English	International
Times Now	English	National
Aaj Tak	Hindi	National
NDTV India	Hindi	National
Zee News	Hindi	National
NDTV Profit	English	National
Sahara Samay	Hindi	National
Headlines Today	English	National
India TV	Hindi	National
Janmat	Hindi	National
Tez	Hindi	National
IBN7	Hindi	National
CNBC Awaaz	Hindi	National
Zee Business	Hindi	National
Teja News	Telugu	Regional
ETV2 News	Telugu	Regional
Udaya News	Kannada	Regional
Star Anand	Bangla	Regional

(Source: Data from news channel websites, 2007)

Table 3.5: 24/7 news channels, India (Thussu, 2007, p. 97).

The public TV Doordarshan operates 21 services, including its main channel DD1, which reaches some 400 million viewers (BBC Monitoring, 2010).

Domestic channels Aaj Tak, a commercial 24-hours news channel in Hindi, Star News, India TV and NDTV are among the most popular channels in the wider population (Figure 3.43), as a recent report produced for the BBC⁵⁹ confirms.

⁵⁹ BBC World News, India Monthly Report, June 2010.

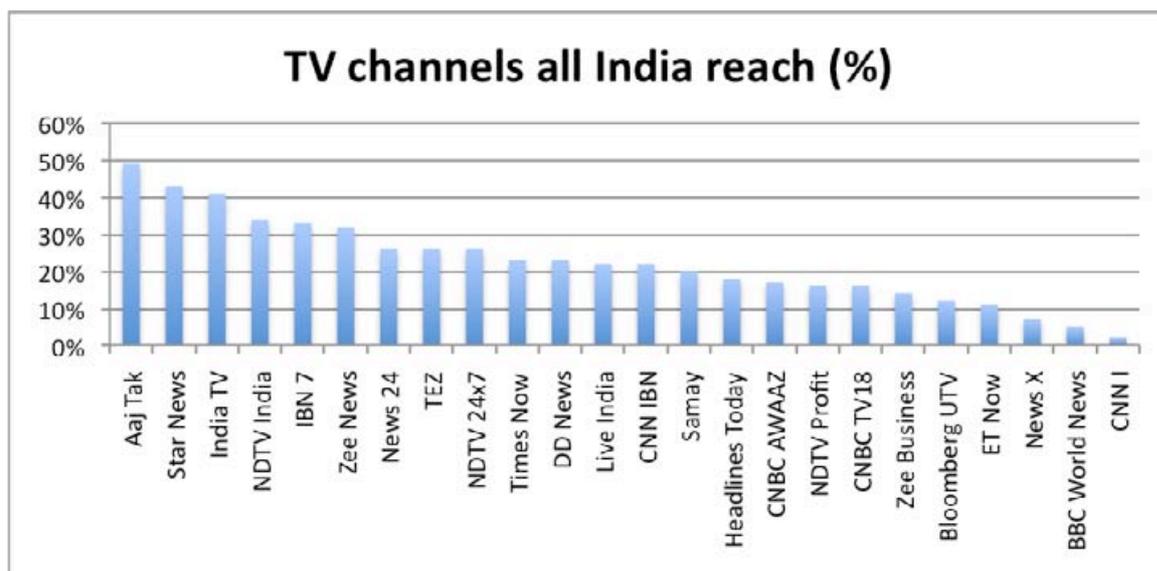


Figure 3.43: All-India reach of television channels for June 2010 (Source: BBC, 2010; all based on people with cable).

While these statistics cover all of India, the top three English news channels – NDTV 24x7, Times Now and CNN IBN – have a higher reach in the major cities than in India as a whole. The picture for Hindi news channels looks inconclusive, with the reach for top channels like Aaj Tak, Zee News, CNBC Awaaz and NDTV dropping over the past four years, while staying steady for channels such as News 24 and India TV. Among international broadcasters, BBC WN has a monthly reach of 7.7 million people, while CNN I reaches 3.2 million. However, consumers on average spend more time watching CNN I (12 minutes) than they do watching BBC WN (9 minutes)(BBC, 2010). Overall, these figures suggest that while Hindi news channels compete for the masses, English news channels compete for high-end audiences.

Our fieldwork carried out in Mumbai in August 2010 arrived at similar conclusions. Preliminary findings from the focus group discussions suggest that the average Indian media consumer has a very limited knowledge and usage of international news providers. Interest largely lies in news that is exciting/sensational and delivered quickly, promptly and without too much detail. Television channels are generally perceived as trustworthy and factual with no difference between domestic and international providers. However, in contradiction to this, BBC and CNN were recognised in our focus groups as more accurate in their reporting (even regarding national news). Domestic channels are accessed both for national and international news. It further emerged in the group discussions that international providers are perceived as being an important medium for measuring India’s advancement compared with the rest of the world.

3.9 Pakistan

Section summary

Pakistan has a very restricted media environment. Most people in urban areas watch private television channels such as Geo News or Express News, or watch the state-owned PTV channels (particularly PTV1) as opposed to international channels. Private FM radio stations have in recent years started to broadcast a wider spectrum of opinions, but they are not allowed to broadcast their own news programmes. Since there rarely are cable television or FM stations in rural areas, the need for reliable news not influenced by domestic pressures and sectarian tendencies persists. In urban areas, Pakistani media consumers are restricted by strict government rules and powerful broadcasting regulators who jeopardise their access to international broadcasters, as they can choose to take international radio stations or television channels off-air whenever they like. This makes life difficult, both for international broadcasters operating in Pakistan, and for Pakistani media consumers in need of accurate and reliable information in times of increased political tension and insecurity.

As in most of the other seven countries investigated in this study, in Pakistan there is a big discrepancy in media consumption between rural and urban areas due to poor infrastructure in rural areas. In many rural areas there is no cable television or FM radio, not to mention internet access. Around 50% of the population in rural areas do not have a mobile phone, and those who do often only have access to a very basic one. Internet access in rural areas only exists to a limited degree. Television is the most widely owned media equipment in Pakistan, followed by mobile phones and radio (Figure 3.44).

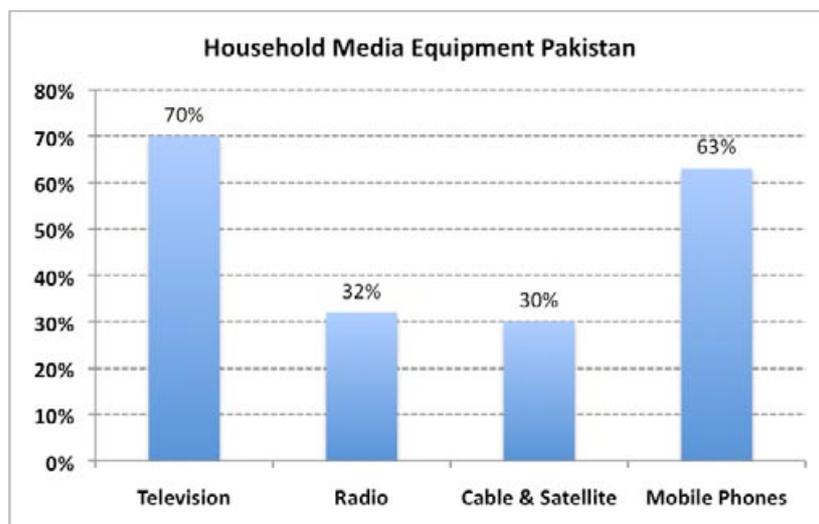


Figure 3.44: Household media equipment, Pakistan (Source BBC 2009).

Pakistani media consumers live in an environment of extreme social, political and economic pressure in a daily life characterised by insecurity and unpredictability. In this context, news about local and national events that is immediate, unbiased and accurate is highly important. Focus group participants in a study carried out by the BBC perceived domestic media as controlled by either the government or the army, and saw international media as portraying Pakistan in a negative manner (BBC, 2009⁶⁰). Overall, domestic Pakistani media, particularly radio and television, have become more independent in recent years. While in the past only the print media voiced a range of opinions, now private cable television channels and, to a growing degree, FM radio stations are providing a widening spectrum of information (IBB, 2009⁶¹). Television, newspapers and radio, as well as family or friends, are the most frequented sources for news and information, for both weekly and daily use, while international media, text messages and internet are used to a much lesser degree. In 2008 only approximately 10% of the population used international television and radio weekly as sources for news and information, and even less than 10% used international radio and television daily (Figure 3.45).

⁶⁰ BBC (2009), 'Pakistan – Fieldwork Report', December 2008 to January 2009.

⁶¹ IBB (2009), [Broadcasting Board of Governors] 'International Audience Research Project – New Media in Pakistan: Summary Report', March–April 2009.

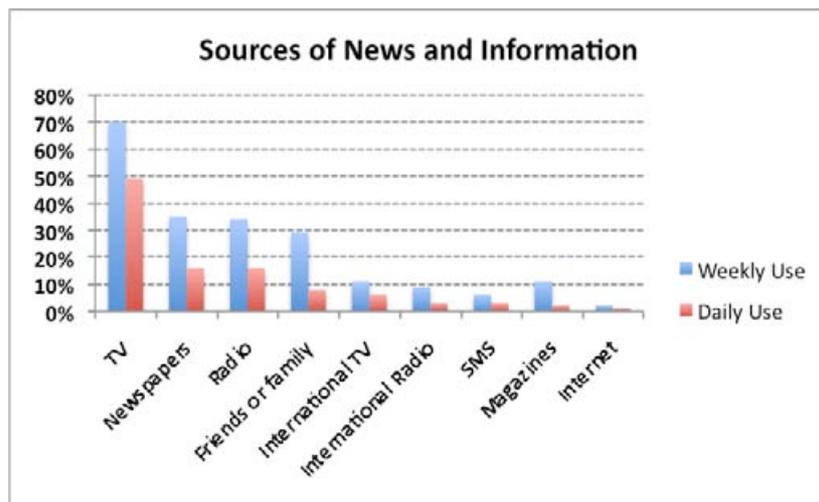


Figure 3.45: Sources of news and information, Pakistan (Source: Intermedia National Survey Pakistan 2009).

A study of young Pakistani media users carried out by Intermedia at the request of IBB in 2009 suggested that in such an environment of insecurity and political uncertainty the potential power of new media in collecting and disseminating news and information is very strong. However, at the moment both internet access and mobile phone are still comparatively high costly and therefore not accessible to the majority of the population (IBB, 2009). According to the IBB study, television is considered the best source for news in Pakistan as it is live and easy to access, and watching it is a popular family activity (IBB, 2009). Since there are no cable television or FM stations in rural areas, the need for reliable news not influenced by domestic pressures and sectarian tendencies still persists, constituting potentially an opportunity for international providers of news. This seems of particular relevance considering that many of the domestic providers, according to the young consumers interviewed in the IBB study, provide poor coverage of international news.

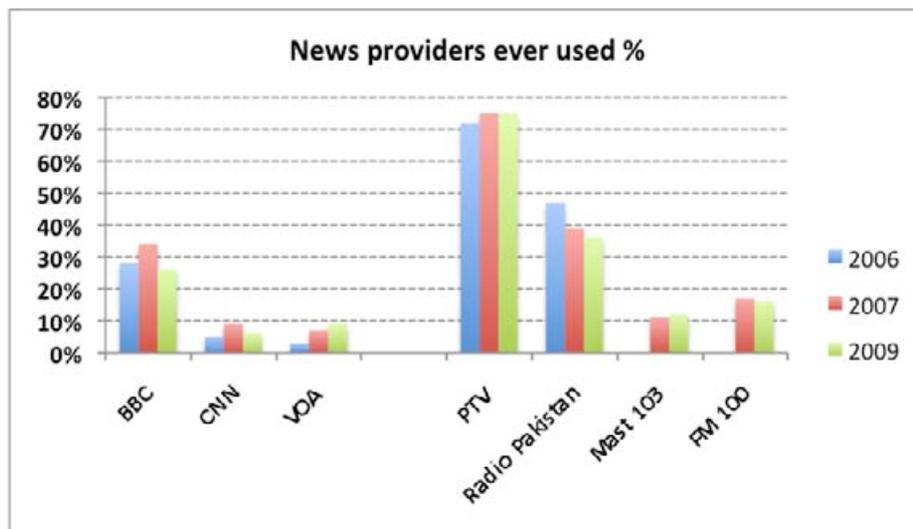


Figure 3.46: News providers used, Pakistan (Source BBC 2009).

As Figure 3.46 illustrates, as with trends in most of the other eight countries investigated, international providers of news have been considerably less used over the past few years in comparison to the domestic providers. However, the level of use of the BBC remains quite high. Overall, though, the audience decrease seems to have been universal, affecting international providers as well as some of the domestic providers. Of all the media available, Pakistan TV (PTV) is particularly popular. While VOA has gained new audience share since 2006, albeit from a low base, there has been a decrease in gaining new audiences for the CNN and the BBC since 2007.

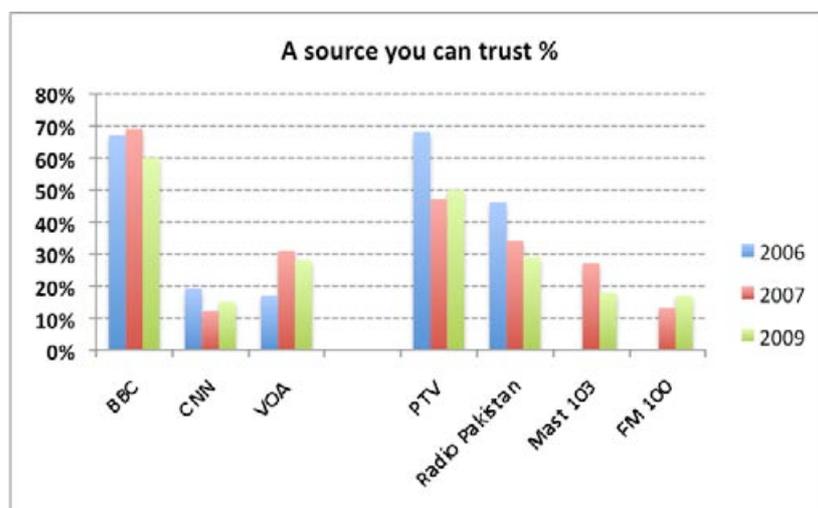


Figure 3.47: Trust in news providers, Pakistan (Source BBC 2009).

While the reputation of international providers seems on a comparable level to that of domestic providers, considerable differences exist *between* the international providers, with the BBC being by far the most trusted source compared to the CNN and VOA. In 2007 and 2009 the BBC was alone among international broadcasters in being more trusted than any of the main Pakistani stations. However, trust in VOA has also grown, though from a much lower base, from 17% to 28% (BBC 2009).

Radio consumption in Pakistan

More than 100 private FM radio stations have been licensed. However, FM stations are not allowed to broadcast their own news programmes (BBC Monitoring, 2010⁶²), as was outlined in section 2.4. However, and despite this prohibition, while the score of new FM channels have, to date, been primarily music and entertainment orientated, some of them have started to broadcast their own news (IBB, 2009). If this trend continues, FM radio may soon become as popular for news as it is for music. A considerable number of unlicensed FM stations are said to be operating in tribal areas of the North-West Frontier Province. They are often operated by clerics and some of them are accused of fanning sectarian tension through hate speech (BBC Monitoring, 2010). International broadcasters, such as the BBC, are on- and off-air on their partner stations, depending on the broadcasting regulator's inclination to restrict or grant access to the broadcaster's news or not. This can change from week to week and is often unpredictable. It also makes it very difficult reliably to estimate audience figures for individual broadcasters. Figure 3.48 therefore needs to be understood as a snapshot of radio consumption at a particular point in time, rather than as providing absolute figures.

⁶² BBC Monitoring, 'Pakistan Country Profile', http://news.bbc.co.uk/1/hi/world/south_asia/country_profiles/1157960.stm#media, 18 August 2010, accessed 20 August 2010.

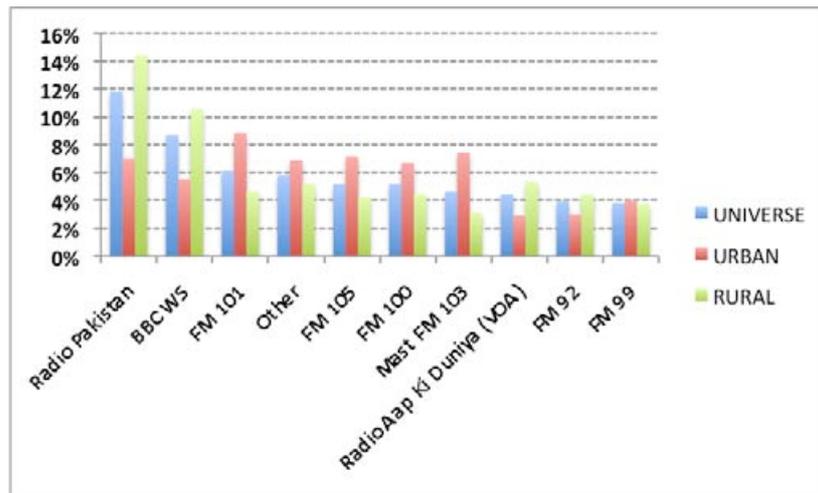


Figure 3.48: Radio consumption, Pakistan (Source: BBC 2009).

Television consumption in Pakistan

Television is the dominant medium in Pakistan and there are around 50 private channels. The majority of viewers receive them via cable. There are no private, terrestrial stations (BBC Monitoring, 2010). To a large degree, the continual reliance on television seems to be a result of the private news channels, led by Geo News (IBB, 2009).

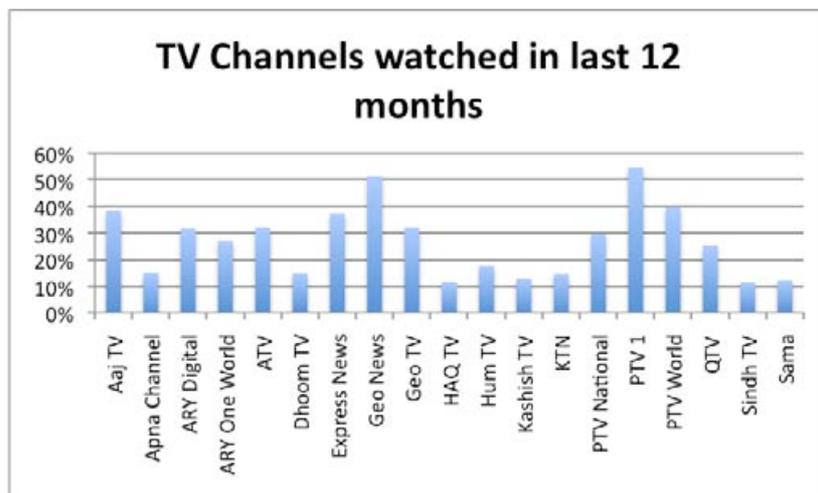


Figure 3.49: Television channels watched in last 12 months, Pakistan (Source: Intermedia National Survey Pakistan 2009).

As Figure 3.49 illustrates, Geo News, which offers news in the nationally spoken language Urdu and is based in Dubai, is the leading private news channel that can

compete with state-run PTV, particularly PTV1. In the 2009 National Survey in Pakistan, 54.6% of participants stated that they had watched PTV1 in the past 12 months as opposed to 51.4% who had watched Geo News in the past 12 months.

With regard to international broadcasters, BBC World fell from 14th position in 2006 to 20th in 2008/9, and viewership fell from 4% to 1.6% (BBC, 2009). However, according to the National Survey 2009, 8.7% of participants indicated that they had watched BBC World News in the past 12 months, while 6.6% stated that they had watched CNN International (Figure 3.50).

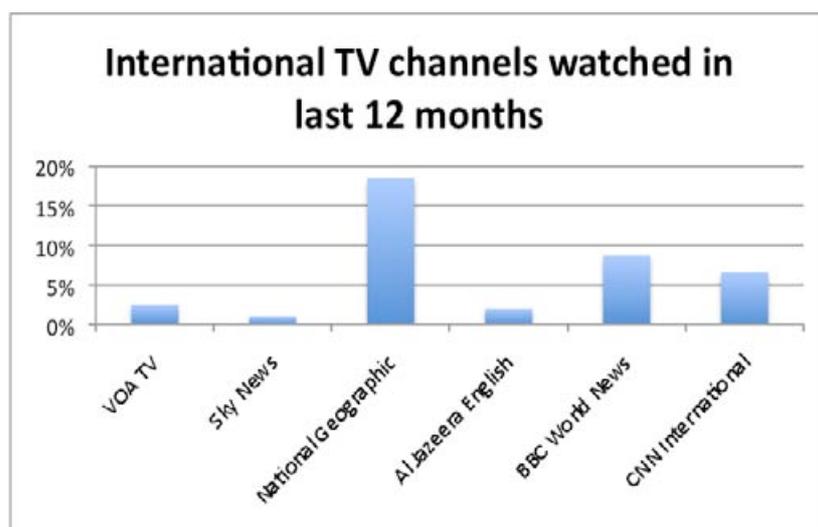


Figure 3.50: International television channels watched in last 12 months, Pakistan (Source: Intermedia National Survey Pakistan 2009).

Pakistan is a desirable but risky territory for international broadcasters. On the one hand, there is a persisting need for reliable news, both for radio and television, from international providers. On the other, permission to be broadcast by partners is subject to the attitude of the broadcasting regulator, which is unpredictable and can change week by week: the broadcasting regulator can order a halt to the carriage of foreign television and radio channels at any point. However, mobile phones are widely used and owned. While only a minority of people have the means to access the internet through their mobile phones, it can be assumed that both mobile phones and the internet in the long run might offer new opportunities to Pakistani media consumers. In the next chapter, current news consumption trends with regard to new media are explored in the eight target markets.

4 Emerging themes on the role of new media in the consumption of news from international broadcasters

4.1 Overview

This section explores the impact of the internet and mobile phones on the consumption of news from international broadcasters, and investigates the research question whether new media have led to new kinds of providers of news being used. So far, it has been established that the most widespread trend across all eight countries has been the growing importance of television. However, it looks as though this dominance of television may be challenged in future, as becomes evident if one has a closer look at the map of undersea data cables planned and already in place in Africa and South Asia. While internet access in most African countries is still low at present (see Table 2.2 in Chapter 2), mobile phone subscriptions in Africa and South Asia have rocketed over the past decade, and it can be assumed that figures for mobile phone usage are presumably even higher, given that most official statistics do not account for the common practice by millions of people of lower socio-economic classes of sharing mobile phone appliances while owning individual SIM cards (which allows them to have their own phone number).

4.2 New media access and usage

Given the infrastructural differences in the countries, there also exist remarkable differences between internet and mobile phone penetration and usage.

- *Algeria*

In Algeria, half of all participants (51.9%) in the 2007 Algerian Urban Survey stated that they had used the internet at home, at work or in internet cafés, but only 42.2% had used it in the last 12 months. Half of those people who had used the internet in the last 12 months had used the internet to find out the latest news (Figure 4.1). Most internet users in Algeria access information online in French (28.8%), followed by Arabic (11%) and English (8.6%).

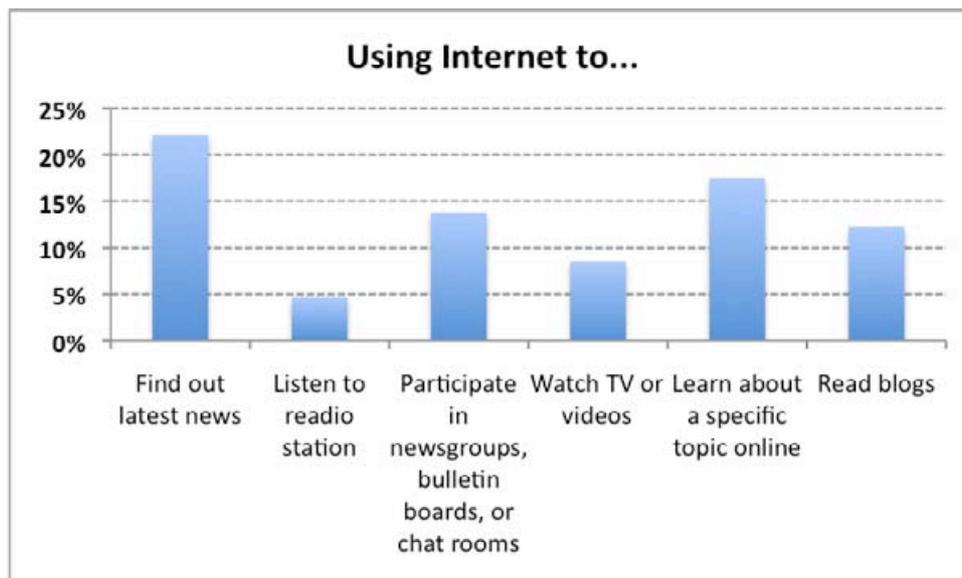


Figure 4.1: Use of new media, Algeria (Source: Intermedia Urban Survey Algeria 2007).

Yahoo!, Google and Hotmail were the websites most frequently visited in the previous four weeks by Algerians. The Al Jazeera TV website was the most frequently visited site (3.3%), followed by the Journal El Khaber website (2.9%) and the El Watan Newspapers website (2.8%) (Figure 4.2).

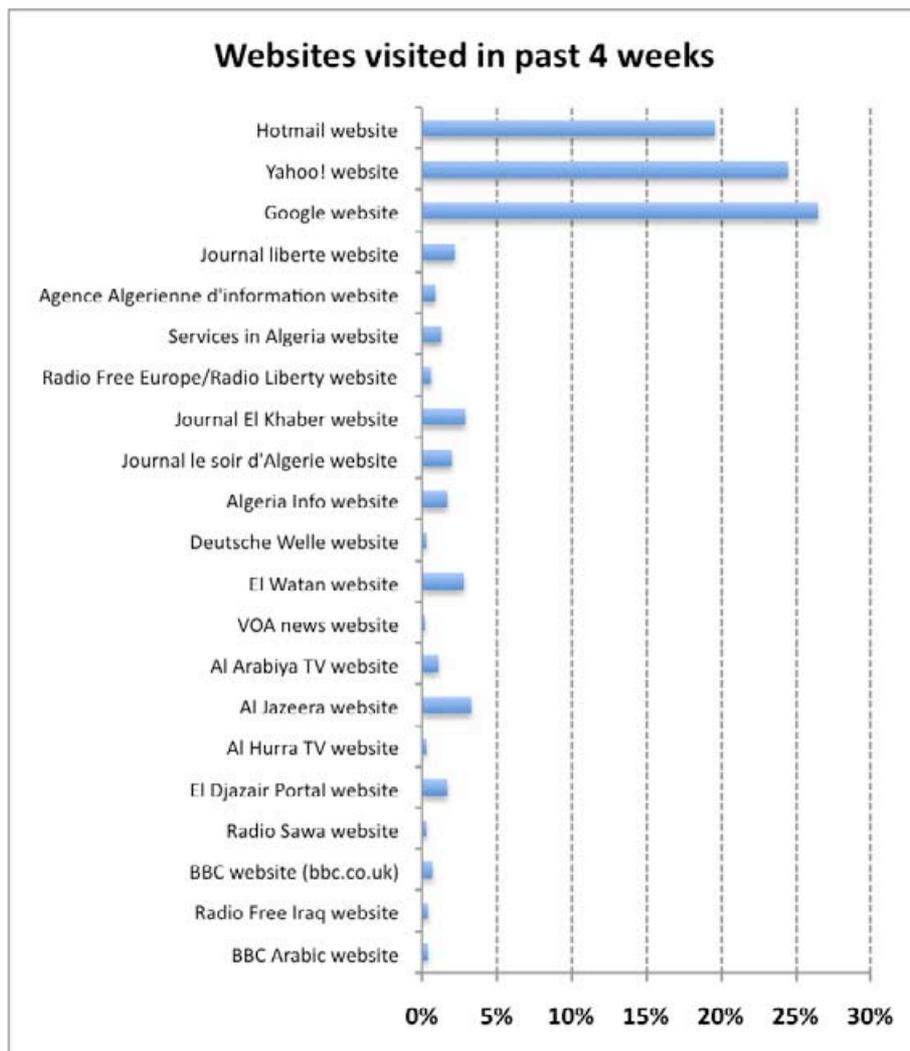


Figure 4.2: Websites visited in previous four weeks, Algeria (Source: Intermedia Urban Survey Algeria 2007).

In the 2007 Algerian Urban Survey, 89.9% of participants stated they had mobile phones available anywhere.

- *Egypt*

In Egypt, the internet market has grown slightly with 14% of adults going online monthly in 2009, compared to 12% monthly in 2006 (BBC, 2009⁶³). Internet penetration is at 21.2%⁶⁴ second highest of the eight target markets investigated in

⁶³ BBC, 2009, 'Egypt – Media Market at a Glance', August 2009, Source: BBC GND/Intermedia.

⁶⁴ Internet World Stats, <http://www.internetworldstats.com/stats1.htm>, as of 30 June 2010, accessed 20 August 2010.

this study. The 2009 Egyptian National Survey found considerable variation in the usage of online news by different age groups (Figure 4.3).

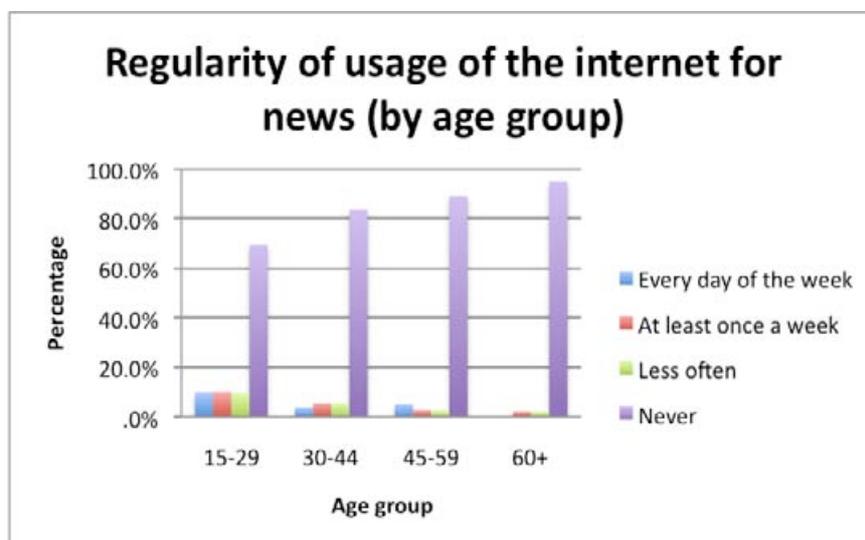


Figure 4.3: Regularity of internet use, by age group, Egypt (Source: Intermedia National Survey Egypt 2009).

Nearly two-thirds of Egyptians owned a mobile phone (up from 43% in 2006). Mobiles were mainly used for phone calls and sending texts, but 7% of adults listened to FM radio on their phones and 2% watched live television on their handsets (BBC, 2009⁶⁵).

According to the National Survey in Egypt in 2009, only a very small percentage of the sample, less than 1.8%, received news updates through text messages from a provider. Those who did were distributed as follows across the providers (with no indication for figures from BBC, CNN or CNBC) (Figure 4.4).

⁶⁵ BBC, 2009, 'Egypt – Media Market at a Glance', August 2009, Source: BBC GND/Intermedia.

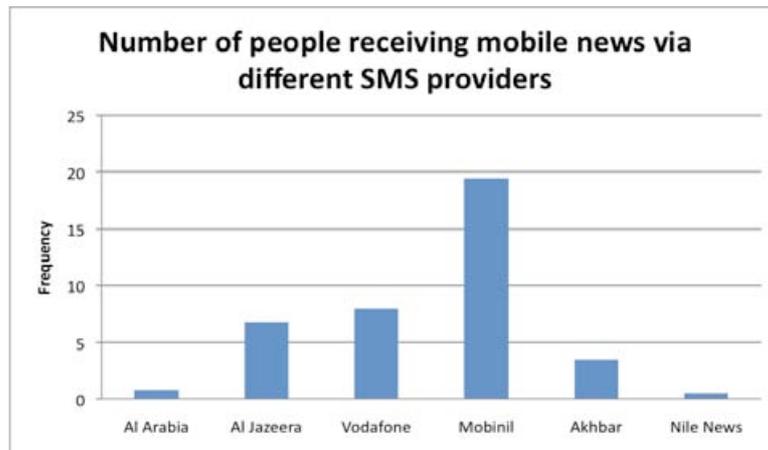


Figure 4.4: Receipt of news updates via text messages, Egypt (Source Intermedia National Survey Egypt 2009).

- *Senegal*

In Senegal, according to a survey of France 24 in 2010, around 1% or less of people access the internet to get information about national events, current affairs in Africa and worldwide. Internet penetration is, at 6.6% of the population, comparatively low (see Chapter 2), and internet access at home is an unattainable luxury for the average Senegalese media consumer. However, internet cafés are popular places to which, particularly, young people tend to flock. In a BBC survey of 2007, 74.1% of participants (unweighted sample) stated that they had never used the internet. 3.6% had accessed the website of the popular newspaper L'Observateur (lobservateur.sn), and 3.7% had accessed the website of Radio France Internationale (rfi.fr) to get information. BBCafrique.com had been accessed by 1.3%. In our fieldwork, a majority of the participants who said they would use the internet to access news stated that they would use websites such as Yahoo! or Google. Mobile phone usage is much higher than internet usage in Senegal, and 11.2% of participants in the above-mentioned BBC survey of 2007 stated that they received text alerts from a subscriber service. Many Senegalese people use their mobile phone to listen to the radio, but accessing the internet through the mobile phone is too expensive.

- *Cameroon*

Meanwhile, in Cameroon, access to the internet is not restricted by the government, though slow connections and high fees at internet cafés helped to limit access to just

2 percent of the population in 2008.⁶⁶ As of 30 June 2010, internet penetration in Cameroon is up to 3.9% (Internet World Stats⁶⁷). Internet *home access* is, at 1.3%, about as low as in other African states (ITU World Telecommunications data base, 2010, figures of 2008). In a study carried out for France 24, 0.3% of participants said they would access the internet to learn about events in Cameroon, and 1% each stated they would access the internet to learn about events in Africa and the wider world (France 24, 2010). 32.3% of people indicated they had a mobile phone subscription (ITU World Telecommunications data base, 2010, figures of 2008).

- *Kenya*

In Kenya, the penetration of new media and technologies has grown steadily since the start of liberalisation of the telecommunications market in the late 1990s (IBB, 2009⁶⁸). Following a survey by the BBC (2009), access to the internet has grown substantially, with 33% of adults having access anywhere in 2008 (up from 22% in 2007), but internet penetration at home is, at less than 2%, still very low. While in June 2008 the first fibre-optic cable connection was completed (IBB, 2009), at the moment high-speed internet access is still negligible (0.2% in 2008). However, optimistic observers believe that high-speed internet connectivity is going to improve considerably, with several other international cables also expected to go live by 2011. This new network will increase speed and trigger a reduction in costs. But although these infrastructural improvements will make the internet ultimately more widely accessible, it can be assumed that constraints, such as poor electricity supply even in urban settings such as Nairobi, low PC ownership and low digital literacy will persist, at least for the foreseeable future, and will impede the growth of the internet network in Kenya. In other words, internet access at home will remain a privilege only affordable to an affluent minority. Overall, while the internet seems to provide an exciting opportunity, the constraints and hindrances described make the internet lag behind television and radio in importance. Both mobile phone ownership and internet use are much higher in urban areas and especially in the capital. 11% of urban Kenyans and almost 16% of Nairobi residents reported using the internet in the previous week in a survey carried out for IBB (IBB, 2009). Simultaneously with the slow, yet steady, growth of the internet in Kenya, the usage of news sites such as the BBC has increased over the past few years (BBC, 2009).

⁶⁶ Freedom House Press Freedom Index for Cameroon (2009), <http://www.freedomhouse.org/template.cfm?page=251&country=7580&year=2009>, accessed 7 June 2010.

⁶⁷ Internet World Stats, <http://www.internetworldstats.com/stats1.htm>, as of 30 June 2010, accessed 20 August 2010.

⁶⁸ IBB (2009), [Broadcasting Board of Governors] 'International Audience Research Project – IBB New Media Technologies Study: Kenya', February–March 2009.

Around 10% of internet users indicated in a survey conducted by the BBC (BBC, 2009) that they accessed a BBC site regularly. A study of young, affluent and tech-savvy Kenyans found that they prefer a mix of current information and entertainment and follow both local and international news online as well as via traditional media, with a slight preference for international news among males and for domestic news among females. Mobile phone penetration in Kenya is, as in the other African and South Asian countries examined in this study, significantly higher than internet penetration. Although just fewer than 5% of respondents to the 2009 Intermedia national survey had used the internet in the previous week, 46% indicated that they owned a mobile phone themselves, and 64% either owned a mobile phone or had one available in their household (IBB, 2009). There are four main mobile phone operators in Kenya. The two oldest and largest companies, Safaricom and Zain (formerly Celtel) have roughly 16 million subscriptions combined, which is the bulk of Kenya’s mobile phone market. Two additional companies, Orange and Yu, have attracted an estimated 50,000 and 200,000 consumers, respectively, since they were established in late 2008 (IBB, 2009).

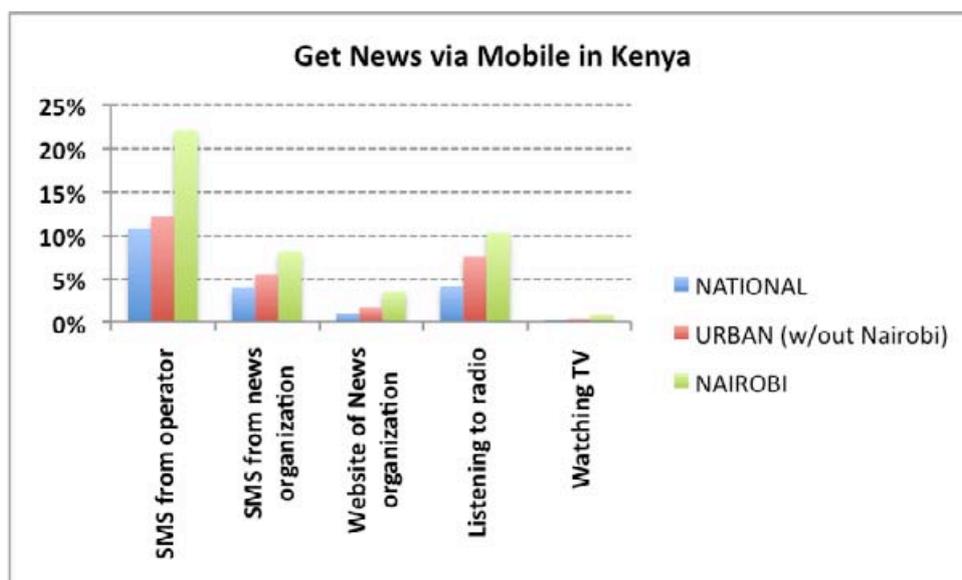


Figure 4.5: Receiving news by mobile, Kenya (Source: IBB 2009).

The above-mentioned IBB survey (IBB, 2009) suggests that obtaining news from media outlets via mobile phone text messages has become popular, at least among young people, although, according to this study, users often complain that the news subscription services are expensive and not always relevant. As Figure 4.5 above illustrates, however, rural areas again seem to lag behind in this development, not least because of poor rural infrastructure and costs – similar to hindrances that jeopardise the growth of the fixed internet market in Kenya.

- *Nigeria*

In Nigeria, internet penetration is, at 28.9% of the population, the highest of all the eight markets investigated. Yet access is very costly, and only a socio-economic elite can afford to have internet access at home. However, the wider population can access the internet in cyber-café's or at the workplace. In the Nigeria National Survey of 2009, 5.3% of participants stated that they access the internet in cyber-café's. Like most of the other seven countries investigated, most participants stated that they access Google or Yahoo! to get information and news about current affairs (Figure 4.6).

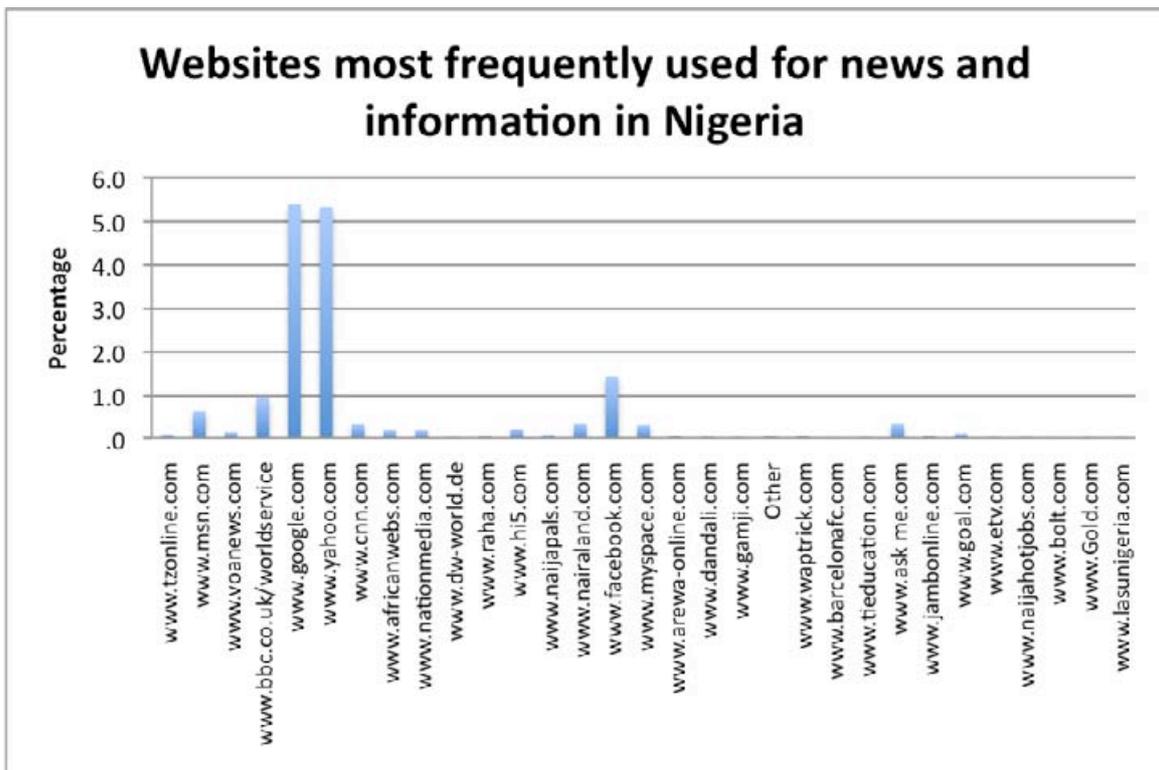


Figure 4.6: Websites most frequently used for news and information, Nigeria (Source: Intermedia National Survey Nigeria 2009).

51.6% of the respondents in the 2009 National Survey in Nigeria stated that they owned a mobile phone, and 15% that they use it to get news. 10.4% stated that they receive text news alerts from mobile operators, 6.3% stated that they use their mobile phones to listen to the news, 1.5% stated that they access news websites through their mobile phones and 1.3% had subscribed to text alerts from a news organisation. 0.5% used their mobile phones to watch television online.

- *India*

At a total 14.05 million subscribers to the internet, and over 70.25 million users, the internet has become a significant media force in India (Kohli-Khandekar, 2010). However, its growth has not accelerated as fast as was predicted only a few years ago, for the biggest challenge for the internet in India is penetration, which remains, at 6.9% of the population (see Chapter 2), consistently low. Key problems are the poor power and infrastructure situation in India, which continue to jeopardise the growth of the internet (Kohli-Khandekar, 2010). By contrast, mobile phones are much more widely used: while only 81 million Indians (7% of the population) regularly use the internet, 507 million own mobile phones. In India, calls from mobile phones cost as little as US\$0.006 per minute. Mobile phone subscriptions have been growing rapidly, and Indian operators such as Bharti Airtel and Reliance Communications sign up 20 million new subscribers a month (*Economist*, 2 September 2010⁶⁹). Whereas not very many Indians subscribe to news alerts, according to our own fieldwork, many use their mobile phones to listen to music radio stations.

- *Pakistan*

In Pakistan, only a small percentage (around 5%) of households have internet access at home, and even fewer households have access to broadband, but on the whole internet access is growing (IBB, 2009⁷⁰). Internet access is primarily confined to urban areas, and within those areas to young, affluent and well-educated Pakistanis (IBB, 2009). An estimated 10% of the best educated elite in Pakistan go online daily (IBB, 2009). According to IBB, however, new media have brought a mini revolution to women, allowing them to get in touch with men online before getting married, and, after marriage when often housebound, to sustain their social networks and to stay in touch with friends and family without physical constraints (IBB, 2009). Recently, and partly due to slow, but increasingly growing, access to the internet, domestic news websites have developed as an alternative to 'traditional' news media such as television and radio. The constitutional crisis in late 2008, when a government ban on private television channels led to an increased reliability of news websites, contributed to this new trend. An IBB study of young Pakistani media users further found that the use of formal news websites seems to be limited to date: news sites run by domestic newspapers and television stations are most popular and referred to throughout the working day for headline updates, but only followed in more

⁶⁹ *Economist*, 'The Next Billion Geeks', 2 September 2010, <http://www.economist.com/node/16944020>.

⁷⁰ IBB (2009), [Broadcasting Board of Governors] 'International Audience Research Project – New Media in Pakistan: Summary Report', March–April 2009.

detail when there is a story of particular interest. International sites used by these young Pakistanis to follow news and events are, according to the IBB study, pages of Yahoo! and MSN or Google and YouTube to search specific stories, rather than BBC, CNN or VOA. Meanwhile, the ownership of mobile phones in Pakistan has increased from just 10% in 2004 to nearly two-thirds of households in 2008. The receipt of delivery of SMS of political events or areas where it is dangerous to go, the use of mobile phone cameras to take pictures or film events and post them online, are all new ways of disseminating and collecting news in a constantly changing, dangerous environment. There has been considerable foreign and domestic investment in Pakistan's mobile telephony infrastructure. According to the IBB survey, most services are ready and on offer, but are just too expensive for the average Pakistani. Literacy levels are related to mobile phone use (IBB, 2009), in that many illiterate people find it difficult to send and receive text messages, and sometimes even have difficulties in deciphering keyboard numbers.

4.3 Complementary use of television, radio, internet and mobile phones to access news

In all of the eight target markets mobile phones are more widely used than the internet. India is adding the biggest number of mobile phone users every month, and Africa is the region with the fastest rate of mobile phone subscriber growth (*Economist*, 26 September 2009⁷¹). Since the mobile phone market is saturated in the developed world, it is the developing world's rural poor who will account for most of the growth in coming years, with a projected reach of 6 billion by 2013 according to GSMA, an industry group, half of them being in India and China (*Economist*, 2009). According to a World Bank study of 2009 (reported in the *Economist*, September 2010), in developing countries every 10 percentage-point increase in mobile-phone penetration yields an extra 0.81 percentage points of annual economic growth. Although internet usage is generally lower, this may change in the near future. In a report called 'The Internet's New Billion', Boston Consulting Group predicts that by 2015 there will be 1.2 billion internet users in the BRICI countries (Brazil, Russia, India, China and Indonesia).⁷² However, these new internet users will mostly log on via their mobile phones, as for most people, computers are

⁷¹ *Economist*, 'Mobile Marvels', 26 September 2009, vol. 392, issue 8650, special section, pp. 3–4.

⁷² Aguiar, M., Boutenko, V., Michael, D., Rastogi, V., Subramanian, A., and Y. Zhou, 'The Internet's New Billion Digital Consumers in Brazil, Russia, India, China, and Indonesia', September 2010, Boston Consulting Group.

unaffordable. Increasing numbers of Indians are expected to start using their mobiles to access the internet from next year when third-generation (3G) services, which allow subscribers to access the web, arrive (*Economist*, September 2010).

But despite these promising infrastructural developments and a new generation of media users confidently accessing and using new media, penetration rates and figures for internet usage remain low in the eight countries, suggesting that the internet at present is only accessible to educational and socio-economic elites.

Numerous obstacles still need to be overcome to make mobile phones and particularly the internet as easily accessible and affordable as news media such as radio and television to people in developing countries. High costs of access, slow connections and expensive services are only some of these jeopardising factors.

Despite all the differences between the markets, a few commonalities seem to exist. Three overarching new media trends were observed that transcended the individual markets.

First, people in developing countries use mobile phones and the internet confidently and across social divides if literacy and income permit access and usage. This is a factor often overlooked by international broadcasters and media developers from developed markets. Media uptake and usage in developing and emerging markets is not linear and does not evolve and progress in the same way as it does in developed markets, moving from landline telephones, to radio, to television, to the internet and mobile phones. Mobile phones and SIM cards in most developing countries are reasonably affordable even to people from low socio-economic backgrounds, and there is wide mobile network coverage. In many developing countries, mobile telephony is even further advanced than in developed markets such as the UK. In Kenya for example, where in the past only a small minority had the privilege to have a phone landline, mobile phone banking is commonplace even among the low socio-economic classes, so that people pay their daily bills through their mobile phones and transfer money to relatives in remote rural areas. This may appear paradoxical, but for people who never had access to computers or even landlines before it is much easier to take up and adapt to new media technology, as they do not have to un-learn or override their traditional media habits and usage patterns before adapting to new media. In other words, as Prahalad (2006) put it, people in developing countries do not have to deal with a 'technological forgetting-curve', but can start to learn immediately and therefore can adapt much faster to new media products.

This leads to the second observation, namely, that news consumers in the eight target markets confidently switch between media platforms and use different media

in a patchwork fashion to consume information about current affairs. Media consumers in the eight countries use the internet as well as the mobile phone to access bits of information outside news hours on television or radio. For example, in all of the countries investigated, most people of any age seem to use their mobile phones to listen to the radio (mostly to music stations), be it on the way to work in a matatu in Kenya, or while waiting in a queue in a grocery store in Lahore. While there is at present no sign that new media such as mobile phones or the internet could 'replace' radio or television, mainly because of the high access costs and infrastructural difficulties, there is a strong sense that the consumption of news has become more complementary.

Finally, while many people seem to listen to domestic music radio stations on their mobile phones, and, to a lesser degree, to the news, the providers of news accessed on the internet across the eight target markets seem to be non-traditional news providers, such as Yahoo!, Google or Facebook, and only to a smaller degree websites of traditional broadcasters, such as RFI, Al Jazeera or the BBC. Our fieldwork suggested that opinion leaders seem to access blogs as well as news websites of international providers more frequently, and generally tended to use the internet more. Whether this is because opinion leaders have more time and resources to access and use the internet, or whether they trust new media more than the traditional broadcast media is a question that will be elaborated in more detail in the third report of this project.

5 Conclusion: A changing demand for news from international broadcasters?

In economically difficult times in the West and an environment of imminent public spending cuts, in which nations such as China or Russia are for strategic purposes increasing, not reducing, their investment in international broadcasting, a great deal is at stake for international broadcasters. Phase 2 of this study set out to investigate the consumption of international news by identifying, in each of eight target markets, news access patterns, the dominant national and international providers, the role of international providers compared to that of domestic providers, and potential changes in media consumption habits over the past few years. The diverse picture painted in the previous chapters tells a story of consumers in eight developing countries who are torn between easily accessible news from domestic providers in their local language (but of varying journalistic quality and reliability) and up-to-date news from international providers (which is not always easily accessible, not necessarily geared to the domestic market or local language, but generally of high journalistic quality and accuracy).

5.1 Market developments

The initial evidence gathered through the collation of audience research findings from fieldwork, reports from the BBC, France 24 and Voice of America, the descriptive analysis of data, and academic literature suggest that there are wide variations between the individual markets in terms of consumption of news from domestic and international providers. These variations are informed by differences in the historic, cultural and political context of each media market, and the liberty thereof.

The evidence gathered in this study also led to the identification of six overarching consumption trends that seemed to emerge across all eight of the target markets:

- *Language-, genre-, and personality-guided consumption.* Most media consumers switch between various channels in the same television or radio session. In the countries investigated, it was not the loyalty towards brands that guided people's media consumption, but content: genres (e.g. sports news) or bits of information in the local languages, as well as charismatic presenters that people follow across different channels and stations. While they may have favorite channels, consumers seem to shop around for content that is easily accessible, understandable, to the point, and entertaining. Among the general population, vernacular languages and regional dialects are preferred to

'standard' languages, such as Standard Arabic or Swahili. This became particularly clear in our fieldwork in Egypt (see section 3.3), where people preferred the Egyptian Arabic spoken on private channels to the Standard Arabic spoken on BBC Arabic for example (see section 3.6). This is different from the attitude of opinion leaders, for whom journalistic quality is paramount, and language issues secondary.

- *Trustworthiness and perceptions of high quality do not necessarily translate into consumption.* While certain broadcasters, as for example the BBC, are perceived as providing high-quality news and are highly trusted brands in countries such as Kenya, Egypt or Senegal, this attitude does not translate into increased usage.⁷³ This may partly be because of obstacles jeopardising consumption, such as costly access that makes international television providers unaffordable to average citizens, unpopular airing times on partner stations, etc. (see section 5.2 for more details). A forthcoming Reuters Institute report covering the third phase of this project will look specifically at trust in international news providers and will elaborate in further detail on this topic.
- *Non-linear media uptake and usage.* The majority of media consumer research is based on the assumption that media markets in emerging economies function in the same way as media markets in developed economies do, and that media uptake and usage would evolve in the same way as it has done in developed markets, i.e. evolving from telephone landlines, to radio, to television, to the internet and mobile phones, with rising standards of living. As our findings indicate, this assumption needs to be reconsidered. People in developing countries use their mobile phones in multifaceted ways and, for example, often listen to the radio on their phones while on their way to work. While accessing the internet through mobile phones is still too costly for most, it can be assumed that this might change in the future, too.
- *New, emerging forms of media consumption: 'TV surfing', cross-verification and complementary media consumption.* The increase of choice and of media platforms available also have led to significant changes in media consumption behaviour. First, especially in the fieldwork carried out in the Indian media market, with its abundance of news channels and a tendency to sensationalising the news, consumers repeatedly stated that they would 'surf' the television to cross-verify information across different channels. This *TV surfing*, similar to browsing the internet for information, was intensified by

⁷³ This finding will be explored in more detail in the third report of this project, which looks at changing levels of trust in international broadcasters

long commercial breaks, according to some of the focus group participants of our fieldwork.

Second, *cross-verification* of information across different channels was observed in India and in other media markets, too. Our observations suggest that cross-verification is a result of increased choice, doubted quality of news (e.g. in India, where news is often sensationalised) and doubtful reliability of information due to controlled media environments (e.g. in Senegal).

Third, consumers across all eight countries access and use media content from different media platforms in a complementary fashion. The resulting picture is that of a news-patchwork deriving from many different sources that is unique for each consumer. While television in most countries has replaced radio as the most consumed medium, with the emerging mobile phone technology that allows people to access text based or audio news-on-the-go at ever lower costs, this may change over the next few years. Already, as revealed in our fieldwork, many consumers listen to the radio on their mobile phones on their way to work, but they do not necessarily listen to the news on their phones, but to music channels (depending on country-specific broadcasting regulations). Those people who have access to the internet at work, at school, at internet cafés (a majority) or at home (a minority in most countries) use new international providers and news-wires that accumulate news 'bits', such as Yahoo!, Google or Facebook to access information on current affairs.

- *A new generation of media consumers relying more heavily on internet and mobile phones.* Unsurprisingly, perhaps, across all eight target markets a generational shift in the consumption of news from different media platforms could be observed. For most young consumers across the eight countries, radio was mostly consumed through their mobile phones. And many of them, regardless of social class, had used the internet in internet cafés to access information. With improving communications infrastructure in the target markets, and media equipment prices falling, it can be assumed that these developments will gather further momentum in the future.
- *New balance of power among domestic, international, and transnational news providers.* Through liberalisation and the lessening of government control in many of the eight target countries, in countries like Senegal and Kenya for example, private media outlets have gained in strength and have succeeded in positioning themselves in opposition to state-run broadcasters, which are perceived by many consumers as mouthpieces of the government. Accordingly, these private media have occupied the niche that previously, in

more restricted environments, was occupied by international broadcasters in these markets. Our research did not find any evidence that new international entrants such as CCTV News or Russia Today had gained substantial audience. However, it was impossible to obtain reliable audience figures for these broadcasters, and no studies on their popularity among African or South Asian audiences or indeed expatriate audiences in the eight target markets were available. By contrast, transnational broadcasters such as pan-African and pan-Arab satellite providers (e.g. Africa No. 1, Africable, etc.) seemed to be highly popular in many of the target markets, together with 'counter-hegemonic' channels such as Al Jazeera (obviously, in many places 'counter-hegemonic' channels and pan-Arab satellite channels are identical).

5.2 Challenges

In the context of these developments, the following challenges were identified across the eight markets that remain as impediments and continue to jeopardise the consumption of news from international broadcasters in developing countries. These impediments are:

- *Restricted freedom of the media and controlled media environments.* In many controlled media environments, as for example in Pakistan, governments have the power to take international providers off air whenever it is convenient and of use for them.
- *Increased competition.* The increase of local provision and the growth of competition from a range of new international and transnational providers is one of the most significant obstacles for traditional international broadcasters in all of the eight target markets.
- *Infrastructure.* This includes frequent electricity black-outs (e.g. Senegal), problems with internet cables (e.g. Kenya), or just generally bad transmission of signals in certain regions of the country (e.g. Egypt or Nigeria).
- *Costly access.* Pay-TV bouquets which contain international broadcasters, or internet access, can be very costly and not affordable for people from lower socio-economic classes or even many of the middle classes. In most countries investigated in this project, domestic television providers are more easily accessible than international television broadcasters. The former are picked up free of charge and even without a special antenna. For the latter, depending on the media company, a specific antenna coupled with a decoder may be needed to gain access to them. Moreover, there is a monthly fee to

maintain the subscription. These fees vary depending on the type of bouquet a subscriber requests. In Senegal, for example, each bouquet contains a certain number of channels with different ratings. The higher the rating, or the more channels requested, the higher the amount of the subscription. For developing countries like Senegal, in which 42.6% of households are below the poverty line,⁷⁴ accessing international providers through legal means is out of reach for nearly half of the population, although, as we have seen, piracy provides an important alternative access route in many places.

- *Reputation of partner stations used.* If international broadcasters are partnering up with state-run broadcasters, such as e.g. KBC in Kenya, which is perceived as the mouthpiece of the government, this can have a negative impact on international broadcasters, or just result in people not tuning in to this channel and therefore not discovering the international broadcaster.
- *Airing times on partner channels or stations* In some countries, such as Kenya or Egypt, some of the slots available on partner channels or stations are during the night, when people do not access the news.
- *Lack of marketing.* In our fieldwork in Egypt and Kenya, younger consumers particularly repeatedly complained that they did not know of, or did not know enough about, certain international channels. This was particularly the case for France 24 and the BBC, of which a remarkable number young participants had never heard. This is a problem for an international brand, as these are the customers of the future.

Many of these obstacles, such as infrastructural difficulties or restricted media environments, are not likely to change overnight. However, hopefully technological progress will drive improvements forward and will make it easier and cheaper for people to access news from international broadcasters across different platforms. However, as access to these providers becomes easier, the level of competition they face from other news providers is also likely to increase.

Given these challenges, it could be concluded that the demand for news from international broadcasters seems to depend on the quality of domestic news provision and/or the degree of infrastructure and media freedom within each country or region. In other words, it is dependent on the political and economic situation in each country, its stability and liberty, as well as the income and means of each individual consumer, that allow people to consume media across different

⁷⁴ Agence National de la Statistique et de la Démographie, 'Situation Economique et Sociale de la Région de Dakar de l'année 2007', août 2008, p. 35.

platforms, including new media, and from pay-TV outlets. In countries with relatively liberal yet not completely free media environments, such as Kenya or India, news from international suppliers seems to be perceived as an additional flavour on an already varied 'news menu' – although the huge Indian market is better placed to meet most of its inhabitants' information needs than is the case in Kenya. In all markets in times of internal political crises, and in politically more unstable countries such as Cameroon or Pakistan which have more restricted media environments, international media serve the important function of bringing accurate and reliable news to consumers.

5.3 Final thoughts

In heavily government-controlled media environments with a scarcity of reliable information, international news providers traditionally had a lot of bargaining power. With the ongoing media liberalisation in many of the target markets, private national providers have gained in strength and have become strong competitors. In this overcrowded, highly competitive environment, scarcity power has shifted from reliable, transparent news content provided by international broadcasters, to the scarcity of the attention of consumers.

While no one disputes the necessity for international broadcasters, the question in these changed contexts needs to be reframed as How can international providers successfully adapt and reposition themselves in this transformed, highly competitive environment? Meeting the needs of most media consumers in developing countries requires a different course than meeting the needs of media consumers in the developed world. Court and Narasimhan (2010) have devised a useful model of strategic choices that can help companies serve consumers in developing markets (Figure 5.1) and, with some adaptations, also be applied to international providers of news. These authors argue that

'by developing a perspective on whether and to what extent consumer tastes are global or local and combining that with a clear view on the affordability and accessibility of a given product, multinationals can go a long way toward determining the strategies and business models that will allow them to gain scale quickly.'

(Court and Narasimhan, 2010, p. 5)

Their model describes four strategic choices related to the category within which a company's product falls, given its affordability and context specificity.

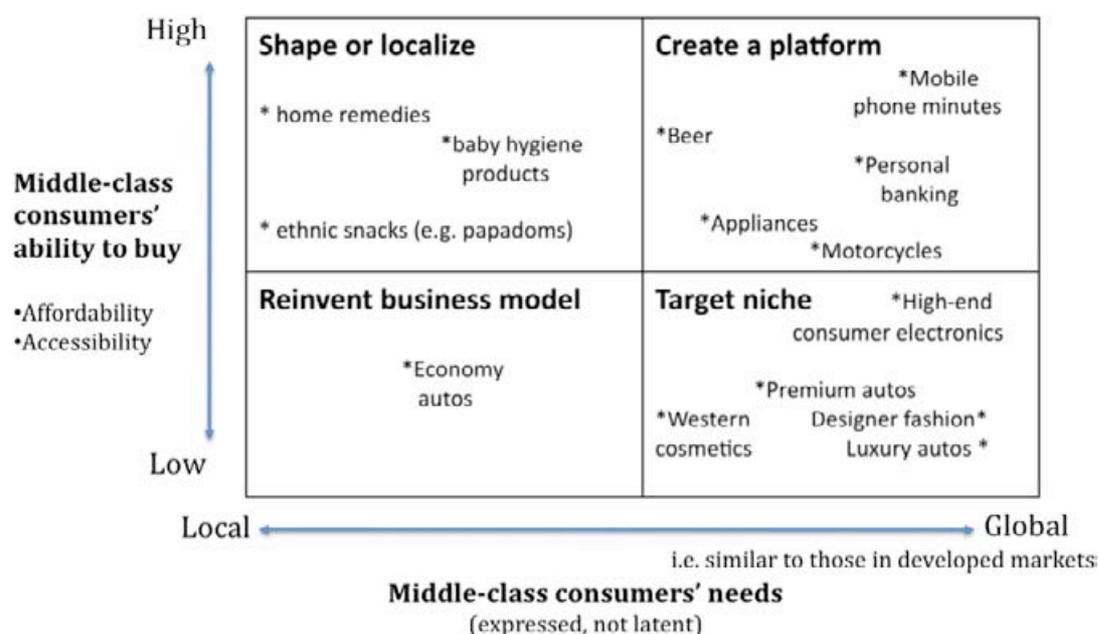


Figure 5.1: Model of strategic choices that can help companies serve consumers in developing markets (adapted from Court and Narasimhan, 2010).

At least three strategic opportunities arise from the target market developments described above:

First, *partner stations* seem to offer a viable solution for a 'shape and localise' strategy: to adapt to current market developments and to counter the challenges concerning vernacular languages and local values. While negotiations with local stations may be difficult and costly, teaming up with the right partner station may give an international broadcaster additional popularity and credibility, as our fieldwork in Kenya seemed to suggest. However, this strongly depends on making the right partnerships, as the wrong choice will have the opposite effect, as illustrated in section 5.2.

Second, a number of assumptions have been outlined upon which most of today's audience research in developing countries still seems to be built, e.g. that population-rich lower classes in developing countries do not access news from international providers or do not qualify as consumers due to their restricted purchasing power; that media uptake is linear; that only affluent people use mobile phones to access news. Examining and questioning such assumptions and recognising that people from lower socio-economic classes are also aspiring media consumers, albeit with lower purchasing power, may unlock new audience segments and potentially open up new, less contested market space for international providers. Further research is needed to understand what products these audiences use and to develop more tailored approaches to reach these audiences.

Third, in conservative markets, long-lasting profitability comes from having a strong brand, in other words, from having some capability that competitors cannot match. In all of the eight countries investigated, international providers are seen as setting the gold standard for news coverage for domestic providers. This gives established strong brands like France 24 or the BBC a potential competitive advantage over aggressive new entrants, both locally and internationally. Focusing on core values such as credibility, reliability and trustworthiness may become the way forward for value innovation of international broadcasters in less conservative emerging markets in the field of new media. Undoubtedly, what people mean by credibility, reliability and trustworthiness in different cultures first needs to be established. This will be one of the topics of our next report on trust in international providers.

Whereas solutions may look different for each individual market, it is the identification and understanding of such values in each unique cultural and geopolitical setting that needs to become a priority (in markets like India, for example, the BBC might focus on becoming a more educative tool and powerful resource for universities and schools). Such adaptation requires profound research and a commitment to ongoing innovation and experimentation with new technology and new media products. And, it may at times require unlikely partnerships and the courage to adopt non-traditional and unconventional new business approaches.

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Appendix

I Data sets analysed for the quantitative data analysis

<i>Country</i>	<i>Year of survey</i>	<i>Source</i>	<i>Title</i>	<i>Conducted by</i>	<i>Coverage and media measured</i>	<i>Sample</i>
Algeria	2007	BBG	Algeria Urban Survey	Intermedia	Urban centres of 10 Northern provinces International and national Radio and TV broadcasters, internet	1,504
Algeria	2009	France 24	Opinion Leaders Barometer 2009	TNS SOFRES	Opinion leaders only International news channels	101
Algeria	2009	France 24	Heads of Households	-	Heads of house only, ABC1 socio-economic background, using satellite dish International and national satellite TV	450
Egypt	2009	BBG	Egypt National Survey	Intermedia	Urban and rural individuals 15+ of 22 governorates across Egypt International and national radio and TV broadcasters, internet	2,006
Egypt	2009	France 24	Opinion Leaders Barometer 2009	TNS SOFRES	Opinion leaders only International news channels	112
Egypt	2009	France 24		IPSOS - Stat	Urban individuals 15+ International and local radio stations	3,030

<i>Country</i>	<i>Year of survey</i>	<i>Source</i>	<i>Title</i>	<i>Conducted by</i>	<i>Coverage and media measured</i>	<i>Sample</i>
Senegal	2007	BBC	National Study	–	Urban and rural individuals 15+ International and national radio and TV, internet	1,548
Senegal	2009	France 24	Africascope 2009	TNS SOFRES	Individuals 15+ living in Dakar International and national radio and TV, print, internet	1,118
Cameroon	2009	France 24	Africascope 2009	TNS SOFRES	Individuals 15+ living in Douala and Yaoundé International and national radio and TV, print, internet	772 in Yaoundé 1,048 in Douala
Kenya	2009	BBG	Kenya National Survey	Intermedia	Urban and rural individuals 15+ of 7 provinces and 25 different ethnicities International and national radio and TV broadcasters, mobile phone, internet	2,000
Nigeria	2009	BBG	Nigeria National Survey	Intermedia	Urban and rural individuals 15+ International and national radio and TV broadcasters, mobile phone, internet	3,011

<i>Country</i>	<i>Year of survey</i>	<i>Source</i>	<i>Title</i>	<i>Conducted by</i>	<i>Coverage and media measured</i>	<i>Sample</i>
India	2009	BBC	Merged data set (merged from 6 BBC data sets)	–	Individuals 15+ of 10 States International radio and TV broadcasters, internet	426,724
Pakistan	2009	BBG	Pakistan National Survey	Intermedia	Urban and rural individuals 15+ of 4 provinces (Baluchistan, NWFP, Punjab and Sind) International and national radio and TV broadcasters, mobile phone, internet	5,010

II Qualitative fieldwork

<i>Country</i>	<i>Date</i>	<i>Method</i>	<i>Sample</i>	<i>Location</i>	<i>Conducted by</i>
Kenya	July 2010	6 focus groups, 3 immersion interviews	Urban individuals 18+, ABCD SEC	Nairobi	TNS Kenya
Egypt	July 2010	8 focus groups, 2 immersion interviews	Urban individuals 18+, ABCD SEC	Cairo	AMRB Egypt
Senegal	July 2010	6 focus groups, 4 immersion interviews	Urban individuals 18+, ABCD SEC	Dakar	PSI Senegal
India	August 2010	8 focus groups, 2 immersion interviews	Urban individuals 18+, ABCD SEC	Mumbai	SHAMAN Market research
Pakistan	September 2010	8 focus groups	Urban individuals 18+, ABCD SEC	Lahore	TNS Dubai