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Trust in international news media in partially free media environments A case study of five markets in Africa and South Asia

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PREFACE: This report is the third stage of a three-phase project on 'International News: Provision, Consumption and Trust in a Rapidly Changing Broadcasting Environment'. The project examines eight countries and aims to explore the increasingly competitive provision of news by international media, changing patterns of news consumption and the ways in which trust may be changing in a world of news abundance as opposed to news scarcity. The project is the first academic study that looks at changing provision, consumption and trust in international media in these countries simultaneously and across the whole population, not just opinion leaders. This working paper presents the findings of the last of three research phases. It examines the changing attitudes to trust in international broadcast news suppliers in five countries: Kenya, Egypt, Senegal, India and Pakistan.

The report collates audience-research findings from fieldwork carried out in these five markets. For each of the five countries and their unique historic, cultural, political and socio-demographic backgrounds, we aimed to examine through this study the role of trust in the perception and consumption of local, domestic and international broadcast news suppliers.

EXECUTIVE SUMMARY: This report is focused on attitudes to trust in international media. It collates findings from 36 focus groups and 11 immersion interviews conducted in Nairobi (Kenya), Cairo (Egypt), Dakar (Senegal), Mumbai (India) and Lahore (Pakistan) in the summer and autumn of 2010. The findings aim to provide an analysis of the attitudes to trust in international media in these five highly competitive markets and an environment of plenty. 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. These changes have resulted in 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. The study suggests that these changes are reflected in attitudes to trust towards international media.

The report explores three core questions for each market. What news are people interested in? Which providers do people trust and why? How does trust affect the consumption of news from different providers and across different platforms? While for each market there are different responses to these questions, the findings also identify a number of overarching trends across the five markets.

In *Kenya*, TV emerged as the most popular and most trusted news medium in the focus groups. This is not surprising since the groups were conducted in the capital city of Nairobi where electricity is widespread. If the study were to cover rural areas, radio would probably be the main medium for news. Urban dwellers mainly use radio when they are away from their homes or travelling in the matatus (main public transportation), and often access it through their mobile phones. Most focus group participants seemed to consume local news most and were only slightly interested in international news. With liberalisation and improved freedom of expression, many of the local news providers have become bolder in their news reporting, thus earning the trust and respect of consumers. This change in attitude towards local providers has affected how international news is consumed. Although international news channels such as CNN, BBC and Al-Jazeera, which are the main international providers, are highly trusted, international media are mainly consumed by a socio-economic and educational elite in Kenya. Generally the respondents felt that international media provided in-depth information in their reporting without holding back information, but that international providers tended to report more negative stories about Africa. The language used in most international stations that are relayed in Kenya (mainly English) was perceived as a hindrance by many focus group participants, as many Kenyans are not comfortable with the English language. There was a mixed reaction towards the partnership between international providers and national providers in the focus groups, as local providers only relay international news late at night when most people are asleep. One of the reasons why Al-Jazeera seemed to be popular amongst the participants was because it is broadcast directly on its own terrestrial channel, therefore viewers can watch it throughout the day. Appreciation for local providers seems to have increased also because of the dramatic increase in vernacular radio stations in recent years. The vernacular stations are mainly relayed through FM technology which has penetrated both rural and urban slums in Kenya. It was evident in the focus groups that the level of awareness of these stations was high. The local providers were mainly appreciated and trusted because of the local language used, which makes it easy to comprehend. The responses of the focus group participants further suggest that the vernacular stations have gained popularity amongst various ethnic communities because of the language and through reporting stories that are of greatest interest to the people. However, local providers are limited by their restricted network coverage and sometimes superficial stories. Word of mouth through family members emerged as the most trusted source of information. Politicians were the least trusted source of information.

In *Egypt*, TV emerged in the focus groups as the most popular and the most trusted medium. TV was followed by the internet, which was particularly popular and trusted amongst young participants across the socio-economic groups. While many of the focus group respondents were generally not or only marginally interested in international news in general, unless there was an international sporting event or a crisis, many respondents were following news on the Middle East and the neighbouring countries. International news channels such as BBC or CNN were trusted but mainly watched by a socio-economic and educational elite. Most respondents were wary about the trust and credibility levels of local TV channels and newspapers, but some of the domestic private and state-owned TV channels were trusted more because of specific, popular presenters, who have earned their audience's trust by being outspoken and by challenging unpopular politicians. While pan-Arab channels such as Al-Jazeera or Al-Arabiya were very popular amongst the focus group respondents, local and domestic media continue to be preferred by most due to two factors: the lack of in-depth coverage of local news stories in international media, and the perceived unfair portrayal of Egypt by international media, particularly in the case of Al-Jazeera, which was viewed favourably by most participants in the past, but whose reputation seems to have taken a hit due to negative coverage of Egypt in early 2010. It is unclear how long this phenomenon will last. Most respondents also felt that there was a lack of transparency from government-controlled media. They appear to trust established international media players like the BBC because of their lack of political restrictions, supported by advanced technological and journalistic professionalism.

In *Senegal*, the majority of the focus group participants stated that they would consume private local media more than international media. The majority of the focus group participants reported that they had only a limited interest in international news, and that they were mainly interested in local and national current affairs. International media were mainly consumed by the socio-economic and educational elite, with the exception of RFI (Radio France International) which had a broader appeal. This trend is partly explained by a degree of media liberalisation of the media that has strengthened and improved the quality of private domestic broadcasters; it may also be due to the fact that most international channels are delivered through local suppliers which charge relatively high subscription fees. Senegal is a developing country with 42.6% of households living below the poverty line. This makes accessibility to foreign TV basically out of reach for half of the population. TV and radio emerged as the most popular and the most trusted media in the focus groups. International providers, particularly RFI, were trusted for their independence, objectivity, reliability, professionalism and punctuality, but were repeatedly blamed in the focus groups for portraying a negative image of Africa. In addition, as Senegal is predominantly a liberal Muslim society (95% are Muslim), a number of the respondents suggested that international media were part of Western governments' desire to discredit Islam and equate it to terrorism.

In *India*, which has the most competitive and the most liberal of the five media environments, the focus group participants reported that they would use international news providers on the following occasions only: to access international news and to get extra information or an independent take on some critical domestic events. Generally, respondents expressed a greater interest in national and local news than in international news. Interest in international news and international news providers is, according to the respondents, at its highest when there are sports events or at the time of a disaster or calamity. The choice of international news providers is limited. BBC and CNN were the best known international providers in the focus groups, with the BBC being better known. Judging by the participants' responses, the availability of local English news channels like CNN-IBN, NDTV 24/7, Times Now, and Headlines Today – has reduced the need for international news providers. A significant number of participants felt that the amount of international news provided on

these local English news channels was sufficient most of the time. TV emerged in the focus groups as the main and most trusted medium through which news is accessed – followed by newspapers. The internet is still a relatively young medium in India, but is viewed as a trusted source. For most focus group participants their regular news channel was a local Hindi channel. Aaj Tak, followed by Star News and Zee News were the popular news channels. Most participants stated that they would switch between two to four news channels. Several factors were identified in our fieldwork that foster trust in news providers in India: with local Hindi channels it is the familiarity, likeability and perception of being ‘one-of-us’ (i.e. Indian identity, familiar language and mannerisms) that helps to build trust. With international news channels it is the competence, professionalism and experience associated with them that evokes trust. Participants felt that the emotional connection with these international channels is low (they are seen as unapproachable, elite and foreign) – but their expertise and professionalism is recognised.

News media in *Pakistan* have evolved in the past few years, and TV channels have mushroomed, offering more variety to the Pakistani TV audience. Focus group participants considered the media in general to be much freer today than a decade ago. TV emerged as the most trusted and used medium, followed by the internet, mobile phones, radio and newspapers, which were considered secondary by respondents as they require some sort of effort or attention from the user. BBC Urdu emerged as the most popular radio news station and respondents reported tuning in particularly when there is no access to television (i.e. during power cuts, etc.). The internet was used by many focus group participants to access information which is banned from local channels. Many participants also reported that they would use their mobile phones to listen to the radio for news or to receive text messages with news updates from friends and family. Only a few of the participants stated that they would subscribe to news alerts from their mobile service providers. There is a general awareness of international channels but viewership is limited mostly to BBC and CNN. International TV channels were trusted amongst the focus group participants because of their accurate, unbiased reporting. However, language was considered a key barrier when it comes to consumption of news from these international providers. Local channels such as Geo and Express emerged as the most popular and most trusted TV channels, as they were perceived as the fastest and most up-to-date channels on national and local affairs. According to the participants, Geo, Express, BBC and CNN are trusted because they were the first few channels in the market to provide detailed and unbiased news. However, focus group participants emphasised that they would turn to international channels only if domestic channels were not providing information on a particular story of public interest, such as the trial of Dr Aafia Siddiqui or the threat to burn the Qur’an in the United States in autumn 2010.

Several trends result from these individual developments that transcend the cultural and geopolitical uniqueness of these five markets:

- Private channels and private radio stations in the five markets are generally more trusted than state broadcasters, which are seen as ‘mouthpieces’ of the government and viewed with some suspicion.
- International providers are highly trusted and regularly used by the socio-economic and educational elites in the five markets.
- Pan-African networks were more trusted than international providers in Kenya by the majority of the focus group participants. This was also partly the case in Senegal, although there, RFI, as an international broadcaster, is highly trusted by elite and mainstream consumers alike. Similarly, in Egypt, pan-Arab broadcasters are

generally more trusted than international broadcasters by all consumers. In India, which is the freest of all markets and has a high degree of local and domestic provision, international providers are perceived as trustworthy, but are mainly watched by an elite.

- People across the population tend to watch news from international providers in times of national or international crises.
- People rely on word of mouth and family for information and 'news' that they trust in everyday life. They then follow this information up via the media. Where people have access to social networking sites, they trust the information of friends.
- Consumers trust information from 'traditional' media such as TV, the printed press and the radio more than they trust the internet across the five countries.
- Consumers in all five markets turned out to be media literate, in the sense that they could make relatively sophisticated judgements about the bias and reliability of different media sources, even people from lower socio-economic classes who were not necessarily educated.

These findings confirm the necessity of international providers as reliable resources for accurate information in times of national and international crises, but at the same time encourage an assessment and discussion about the strategic positioning of individual international broadcasters as elite versus mainstream media in an increasingly competitive media environment. At a time when in some countries local and pan-Arab broadcasters are succeeding in reaching mass audiences, there may be opportunities for traditional international broadcasters to reach beyond the elite, but this in turn adds new challenges of securing regular access from and connecting to mass audiences in a much more competitive and polarised media environment.

1 Introduction

The study investigates the role of trust in the consumption and provision of news from international providers in five countries in the context of globalisation. The five countries investigated are: Kenya, Egypt, Senegal, India and Pakistan.

1.1 Purpose of the study

The goal of this study is to explore the changing ways in which people living in Kenya, Egypt, Senegal, India and Pakistan define, encounter and evaluate news from international broadcasters in the context of increased competition between news providers, as well as intensified media interactivity and global connectivity. Studies on media and trust can generally be divided into offering two types of explanations: those studies that focus on the qualities of the media and those that focus on the characteristics of the audience (Gunther, 1992). No studies so far have looked at trust and the consumption of news across the whole population in the context of increased media competition.¹ This report addresses this void by looking at attitudes to trust in domestic, international and regional news media across the whole population, not just opinion leaders, in the context of globalisation. Trust in media can be defined in countless ways. As a working definition, we started out with a very unrefined conceptualisation of trust as *the product of the perceived fulfilment of a promise and expectations over time*. This provisional conceptualisation helped us to develop semi-structured, open-ended questions for the discussion guide that would allow participants rather than researchers to define trust and news, similar to Coleman *et al.*'s (2009) study. This constructivist approach was adopted in order to detect potential cultural differences in conceptualisations of trust and news across the five countries.

1.2 Research questions

Against the background of these developments and on the basis of the findings of the second research phase of this project, the following research questions were asked in each of the five markets with regard to their individual culture and unique media environment:

1. What type of news are people interested in?
2. How do audiences perceive different international providers in the different countries, and which providers do they trust, and why?

¹ Previous reports commissioned by broadcasters, like the report on trust in the BBC conducted by Human Capital, focused on elite audiences, and exclusively on consumers of BBC services.

3. How does trust affect the consumption of news from different providers and across different platforms?

1.3 Background

With the exception of India, none of the other four countries investigated in this study were fully democratic (see Tables 1.1 and 1.2). As outlined in the previous report (Geniets, 2010), in *Egypt*, there are two state-run national TV channels and six regional channels, but many viewers turn to pan-Arab channels for their news. Egypt is a big force in satellite TV. 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 TV 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. In urban areas such as Dakar, private TV 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 by many as the mouthpiece of the government.

Kenya enjoys a relatively free media environment. While international providers are seen by consumers as essential in offering an alternative, less biased view than the national private and state-owned media, the consumption of international media generally has gone down, particularly in the case of radio. The steep increase in 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 TV providers are mainly used by the middle and upper classes as access is costly. While the TV 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.

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 very popular, only the public radio station All India Radio is authorised to broadcast news. TV is the most popular medium in India, and private domestic TV channels both in Hindi as well as English enjoy great

popularity. However, the leading channels are mostly Hindi news channels. The distinction between news and entertainment on most domestic channels is often blurred, and many consumers are keenly aware and at times 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 for TV. International providers are seen as setting the gold standard for domestic providers by many, but are viewed with some scepticism as they are perceived as 'foreign' and therefore potentially biased against India.

Finally, *Pakistan* has a very restricted media environment. Most people in urban areas watch private TV 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 cable TV and FM stations are rarely available in rural areas, there remains a need for reliable news not influenced by domestic pressures and sectarian tendencies. 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 relays of international radio stations or TV channels off-air whenever they like. This makes life difficult, both for international broadcasters operating in Pakistan via partner stations, as well as for Pakistani media consumers in need of free, accurate and reliable information in times of increased political tension and insecurity.

	Egypt	Senegal	Kenya	India	Pakistan
Freedom of press ¹	Partly free, 60	Partly free, 57	Partly free, 57	Partly free, 33	Not free, 61
Population (total in millions) ²	83	12.5	39.8	1200	180.8
GNI per capita (in US\$) ³	1800	970	770	1070	980
Adult literacy rate ⁴	71.4	39.3	85.1	61	49.9
Gross school enrolment ⁵	70	44	59	63	42
Urban population (% of total)	43	42	22	29	36

Table 1.1 Country comparison by economic, social and political context

¹ Freedom House, <http://www.freedomhouse.org/template.cfm?page=251&year=2010>, accessed Oct. 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 Aug. 2010.

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

⁴ % of ages 15 and older, total population: CIA World Factbook, <https://www.cia.gov/library/publications/the-world-factbook/geos/ag.html>, accessed Aug. 2010.

⁵ % of primary, secondary, tertiary enrolment: 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 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 Aug. 2010.

	Egypt	Senegal	Kenya	India	Pakistan
Sector performance¹					
Telephone lines (per 100 people) ²	12.4	2.2	1.6	3.0	2.2
Mobile phone subscriptions (per 100 people) ²	66.6	55.0	48.6	43.8	56.9
Personal computers (per 100 people)	3.9	2.2	1.4	3.3	x
Households with a TV set (%)	97	43	19	46	56
Number of TV broadcast stations ³	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-run Radiodiffusion Television Senegalaise (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	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 about 70 stations belonging to 8 networks; 2 privately owned radio stations operational (2008)	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	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)	144	x	52	440	164
Internet users (per 100 people) ²	20.0	7.3	10	5.1	11.2
% of pop. covered by mobile-net	95	85	83	61	90

¹ Data from ICT statistics of the Worldbank as of 2008, <http://web.worldbank.org/WBSITE/EXTERNAL/DATASTATISTIC/0,,contentMDK:204p87483~menuPK:64909262~pagePK:64909151~piPK:64909148~theSitePK:6950074~isCURL:Y,00.html>, accessed May 2010. Numbers in *italics* specify years other than 2008

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

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

Table 1.2 Country comparison by sector performance

Despite their individual historical, cultural and political backgrounds, in each of these markets the consumption of news from international broadcasters has undergone unprecedented change during the past few years, stimulated by increased competition between news broadcasters both domestically and internationally, new trends and technological advancements in the development of media platforms, and the (relative) liberalisation of these five media environments. As the findings on consumption of news from

international broadcasters of the previous research phase of this project suggested, which looked at eight different markets across Africa and South Asia (Algeria, Egypt, Cameroon, Senegal, Kenya, Nigeria, India and Pakistan), these developments have led to changes in the consumer behaviour, which are also reflected in the five markets investigated in this study. The findings of research phase two (Geniets, 2010) suggested that local provision is increasing in part because of the rise of commercial local channels, which are often seen as more reliable than state-controlled national channels. Research phase two also found that regional broadcasters are becoming increasingly important. In Egypt for example, pan-Arab satellite channels are very important players drawing large audiences. But there are also signs of the popularity of non-national regional broadcasters in other countries elsewhere in Africa. News from traditional international TV broadcasters generally is more consumed by educated elites, who can afford to pay the often costly access fees, than by the general population. The study further identified 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. The findings of research phase two also pointed to the fact that mobile phones are used widely to listen to the radio – a trend that is set to increase further with the improved coverage of mobile phone networks. Finally, it was suggested in research phase two that 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 behaviors from older media consumers. This has led to a generational shift in the consumption of news from different media platforms (Geniets, 2010).

1.4 Methodology

The study was designed as a comparative, mixed-methods study. Thirty-six focus groups with a total of 184 participants were conducted across Kenya, Egypt, Senegal, India and Pakistan, together with 11 immersion interviews. In each country, six to eight focus groups consisting of six to eight participants were conducted, together with two to four immersion interviews per country (with the exception of Pakistan, where no immersion interviews were conducted). The immersion interviews were primarily intended to add additional insight to the data collected during the focus groups and to provide anecdotal material. In order to be able to draw parallels, the same discussion guide, consisting of roughly 25 semi-structured questions, was used across the five countries, although some of the questions had to be

slightly adapted to fit the cultural and media-environmental specificities of each market, as well as to account for recent events in the case of the floods in Pakistan.² In each country, a research agency was identified which recruited participants for the immersion interviews and the focus groups. The focus groups and in-depth immersions were conducted between July and September 2010 in Nairobi (Kenya), Cairo (Egypt), Dakar (Senegal), Mumbai (India) and Lahore (Pakistan) (see Appendix A for detailed schedule). Only big cities were selected for the fieldwork, to get a variety of participants from different social backgrounds, and to get a sufficient number of people who had been exposed to international providers of news. Since all of the five countries are developing countries and TV reception is higher and more common in urban areas than in rural areas, big cities were chosen.

The focus groups consisted of an initial screening of all participants by means of a short screening questionnaire (see Appendix B). The purpose of this screening questionnaire was to allow recruiters to gauge the suitability of participants for the purpose of this study.³ The screening was followed by the focus group discussion, which lasted around two hours and was moderated in all countries by an experienced local moderator who worked for the subcontracted research agency. The moderator was thoroughly briefed prior to the first discussion and was instructed to ask the questions detailed in the provided discussion guide (Appendix C). At the end of each focus group discussion, participants were asked to fill in a short questionnaire with standard socio-demographic questions and a few open-ended questions about their favourite media channels (see Appendix D) (see Table 1.3). For those participants who were illiterate, additional assistance was provided for their completion of the screening questionnaire at the beginning of the focus group discussion and the socio-demographic questionnaire at the end of the focus group discussion.

² In July 2010, shortly before the scheduled fieldwork in Lahore, heavy monsoon caused devastating flooding in the Khyber Pakhtunkhwa, Sindh, Punjab and Balochistan regions of Pakistan and affected the Indus River basin. An estimated 20 million Pakistanis were affected by the floods, and the international community pledged aid to help the victims. However, by mid-Nov. 2010 and with winter closing in, many of these funds have dried up, food rations had to be halved and an estimated 7 million flood victims are still even without a tent. Many areas are still under water (BBC, 28 Oct. 2010, Pakistan Floods, http://www.bbc.co.uk/news/special_reports/pakistan_floods/, accessed Nov. 2010). Because of the heightened security risk during the floods, it was impossible for me to travel to Lahore to observe the fieldwork. Instead, I listened in to the focus group discussions by phone. Questions were adapted to reduce potential bias against Western media (caused by the slow disaster relief response of the international community).

³ As findings from our previous reports (Rotheray, 2010; Geniets, 2010) suggested that in certain countries international broadcasters are accessed and used across the whole population, not just by opinion formers, the project included consumers across all socio-demographic spheres, gender and age. The criterion for the participation in focus groups was that participants be aware of international broadcasters, even if they did not necessarily watch or listen to them daily.

<i>Before the focus group discussion</i>	Screening questionnaire	<i>duration: approx. 5 mins</i>
	Focus group discussion	<i>duration: approx. 2 hrs</i>
<i>After the focus group discussion</i>	Socio-demographic questionnaire	<i>duration: approx. 5 mins</i>

Table 1.3 Structure of the focus group discussions

In each country, focus groups were structured by socio-economic class, age and gender, in order to allow for as broad a representation of viewers as possible (Table 1.4). In the focus groups consisting of participants from lower socio-economic classes, it was not always possible to find people who regularly watched news from international broadcasters. This in itself is a finding and confirmed findings from research phase two, which suggested that international broadcasters are regularly watched mainly by elites. The number of focus groups varied between either six groups (in Senegal and Kenya) or eight groups, depending on the cultural and religious feasibility to have gender mixed focus groups. In those countries, where religious customs or cultural tradition did not allow men and women to be interviewed together, eight groups were conducted instead of six. This was the case for Egypt, India and Pakistan.

Focus group	Socio-economic status	Age	Gender
1	ABC1	18–34	Women
2	ABC1	18–34	Men
3	ABC1	34+	Women
4	ABC1	34+	Men
5	C2DE	18–34	Women
6	C2DE	18–34	Men
7	C2DE	34+	Women
8	C2DE	34+	Men

Table 1.4 Composition of focus groups

Note: The social classes A, B, C1, C2, D and E were for the focus group participant recruitment collapsed into ABC1 ('middle class') and C2DE ('working class'), along the 'Index of Multiple Deprivation' for England 2004, <http://www.swo.org.uk/imd2004/index.asp>.

Based on the working definition of trust adopted at the outset of the study (see section 1.1), which was based on the perceptions and expectations of different broadcasters by consumers, rather than only asking the focus group participants whether they would trust different broadcasters, the discussion started with questions about news consumption, provider awareness and usage, and then slowly moved towards trust. To elicit the participants' perceptions of different news providers and in order to detect potential bias towards certain providers, projective techniques were used. One of the most common projective techniques used in market research to elicit information is the personification of a brand, as it is often easier to describe something through images and action words ('If broadcaster XYZ were a person, what type of person would it be ...?'). In order to gauge potential cultural differences in circles of trust in everyday life, participants were asked towards the end of the focus group discussions to sort cards with pictures of 13 different sources of information⁴ in everyday life according to their levels of trust.

All focus groups were video- and tape-recorded and transcribed. The immersion interviews were tape recorded and summarised. Once transcribed, the focus group discussions were analysed and interpreted through meaning condensation (Rubin and Rubin, 2005) and multi-level coding (Miles and Huberman, 1994).

Ideally, more immersion interviews and focus groups would have been conducted. However, based on the limited resources available for the study and its ambitious timeframe, we had to accept the limited scope. The decision to conduct fieldwork in only five of the eight countries was also dictated by resources and we chose to do fieldwork in one of each of the three Francophone, Arab-speaking and Anglophone countries in Africa, as well as India and Pakistan. Given the volume of the data and the number of countries investigated, the findings presented in this report therefore ought to be understood as a contribution to the ongoing investigation into trust in broadcasters of news internationally.

1.5 Structure of the report

The report is divided into five chapters. Following this introduction, chapter 2 elaborates on the interest in news in the five markets and the usage of different media to access the news. Chapter 3 continues by outlining the differences in the awareness and usage of national and international

⁴ These depicted sources were: family, friends, work colleagues, neighbourhood, religious leaders, local political leaders, national political leaders, international organisations, mobile phone, internet, newspapers, TV and radio.

providers in the five countries. Chapter 4 presents the different conceptualisations of trust and links the concept to consumption of news and trust in specific providers. Finally, chapter 5 synthesises the findings and concludes by mapping out challenges and opportunities for international providers of news and their consumers.

2 The cultural life of news

Generally when I come home from office I move to some masala news, some light-hearted things that I want to watch... (India, male, SEC B2C, 18–34 yrs)

2.1 Introduction

This chapter examines news and the news media that audiences consume in the five different markets. The core questions asked are, first, what type of news is of interest in the five markets examined? And second, which media do people consume to fulfil their needs for information and news in these different countries?

2.2 News stories and interest in news across the five markets

A decade ago Tomlinson observed that ‘as the technological capacity and sophistication of the global media expand, news coverage of foreign events on television seems to be shrinking’ (1999: 71). In the countries we studied, the growth in international news channels meant that coverage has increased, but audience interest has not kept pace with that expansion.

In *Kenya*, the majority of people did occasionally watch international news, but indicated that they were mainly interested in sports and national news. Salient examples that are reflective of the kind of news stories the respondents followed included sports news about the World Cup, political news about the Kenyan Prime Minister’s health, crime news, particularly about a national serial killer, and international news about the BP oil spill. Similarly, in the focus groups in *Egypt*, recent local news was considered more relevant than regional and international issues. Respondents reported feeling more closely involved in local and national news as these would impact their everyday lives directly. News stories recalled among the participants varied from stories about the Israel–Palestine conflict (mentioned across all the groups), to the Egypt water crisis (discussed among men of all socio-economic groups), to news stories on the increase of prices of daily commodities (discussed among men of all socio-economic groups, as well as older women from the lower socio-economic group), to news stories about the desperate state of the Egyptian education system (discussed among women of all socio-economic groups) and crime stories (discussed among respondents of all socio-economic groups). Most of the news stories recalled somehow touched the respondents in their everyday lives, and therefore evoked their emotional involvement. As one participant noted:

And the price increase ... everything is now increased in price and people cannot afford it any longer. I am a driver and my income is limited. Tell me, how can I afford to pay for everything with this low income and high prices? (Egypt, male, SEC C2D, 35+ yrs)

The more local the news, the more involved and engaged the participants were, as Figure 2.1 illustrates.

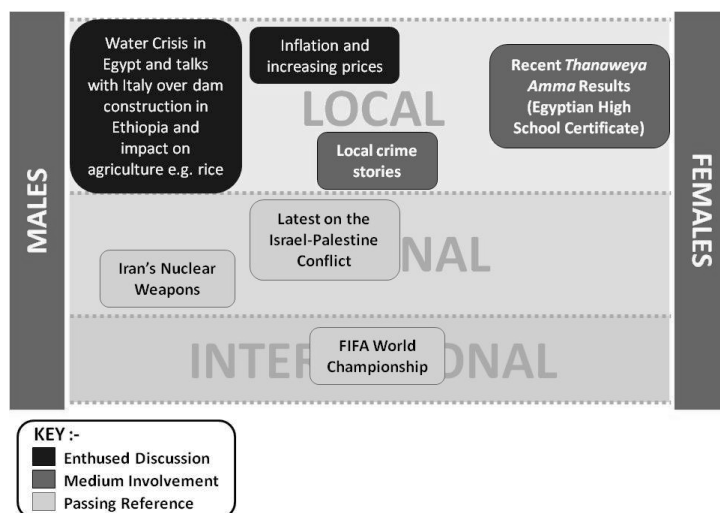


Figure 2.1 News stories consumed in Egypt on local, national and international levels (AMRB research report commissioned for this project)

From a theoretical point of view, these findings are not that surprising. Silverstone (2006: 11) has argued that

there is a simple point to be made, and that is that the media, as indeed other technologies, enable the stretching of action beyond the face-to-face, and consequently undermine the expectation of responsibility and reciprocity that action and communication in face-to-face settings conventionally require. Technologies disconnect as well as connect. The distance they create between interlocutor, between subject and subject, is a precondition, as many have argued, for the erosion of any sense of responsibility that individuals would be expected to have for the other. The media function as technologies in this respect, but they do so paradoxically. For in establishing and maintaining a material disconnection they simultaneously create a symbolic connection. Distance and presence coincide in ways that fundamentally challenge the necessary proximal relations that are assumed to be a precondition for an ethical life. How the media choose to represent, or conventionally find themselves representing, the other, the other who is otherwise out of reach, becomes a fundamental issue for any kind of project seeking a more virtuous, more ethical public sphere.

As the examples of recalled news stories in our focus groups across all countries suggest, people consume and get involved with news about events that touch their everyday lives. Successful broadcasting in that sense is not just about transmitting information and about closing the geographical distance between people, but, as Tomlinson (1999) has argued, about the closing of a moral distance, too. It is about connecting emotionally. The way events are *represented* is therefore crucial to make this *emotional*, as well as an *intellectual* connection to the audience. The findings of our fieldwork suggest that at least four (connected) factors in news stories are of particular importance in establishing this emotional connection: *locality, tone, language and format*.

Locality is invoked by the representation of 'everyday life': in the street, in pubs, at workplaces, at home, as the following example from a focus group participant in India illustrates:

On one channel they showed a cat that was stuck in a tree. To rescue it, the fire brigade was called. There were so many photos of it ... I thought this happens near my house so often – why didn't I ever call the photographer? I mean – this is not news! And you are giving it coverage for two hours! They show all this for TRPs and to fill in the time. (India, female, SEC AB1, 35+ yrs)

In Dakar, where we conducted our fieldwork for Senegal, people recalled news stories linked to the power cuts in the city that had troubled citizens since late spring. These news stories covered planned protests, reported on communities across the countries affected by the power cuts, as well as government reactions linked to the civil unrest caused by the power cuts. While the respondents reported that they were used to power cuts every year during the rainy season from July till October, they emphasized that this year's power cuts were particularly bad compared to previous years, and were making life very difficult. Similarly in India, people prefer to watch local and national news. As one participant explained:

Yes we are interested [in international news] – but not to the level that we are interested in Indian news. ... Now there was a flood in Pakistan ... ok, it happened – we see a bit and move on. If there is something in our country – there is a feeling of 'apnapan' (connectedness). (India, female, SEC AB1, 18–34 yrs)

Different news stories were recalled across genders in India. On the whole, the men displayed greater interest in and involvement with news, while the women by their own admission (particularly the older age segment) were less

interested in news than their husbands were. While participants across gender, age and socio-economic groups were interested in crime, celebrity news, the floods in Pakistan and news on cricket, more men than women were interested in technology news and political news, including the news coverage of a corruption affair.

The level of the focus group respondents' interest in international news turned out to be much lower than the interest in what was happening within India. Respondents did not seem to actively seek international news – unless it involved some major event or calamity.

I want news about my country – it's not that I am not interested in international news – it is just that I am more interested in knowing what is happening in my own country as compared to what is happening in other countries. (India, male, SEC AB1, 18–34 yrs)

One should be interested in international news – because what happens in other countries can impact our country too. (India, male, SEC AB1, 18–34 yrs)

While there is a much greater level of connectedness and interest in local and national news events, keeping actively and regularly abreast of international events was viewed as an indicative attribute of an opinion leader and a member of the elite in India.

When it comes to news coverage – what constitutes news and how news should be reported – respondents differed in what they desire and prefer. A majority enjoyed the coverage of celebrity lives and other 'light-hearted' news items and also a slightly dramatic mode of reporting, a type of news that was summarised as *masala news* (*masala* being the Indian term for spicy, shocking or dramatic).

Aaj Tak is a little dramatic, whereas Star News and NDTV are to the point, but I personally like the drama. (India, male, SEC AB1, 18–34 yrs)

In a channel like Headlines Today – there is a little bit of masala and a little bit of serious news too – it's a mixture of everything. ... masala up to a certain level is okay. (India, female, SEC AB1, 18–34 yrs)

All this, they felt, would make for a more entertaining news experience. Other participants however found the excessive coverage of celebrity lives and the presentation of non-news as news annoying.

I like Star News – they don't talk nonsense and stick to the news item. They show only news that people want to know. It is very professional. But I was watching Aaj Tak yesterday – it was so dramatic about the floods in Delhi; whereas Star News said it professionally and to the point. I feel Aaj Tak and India TV are over the top. (India, male, SEC AB1, 18–34 yrs)

Another very frustrating thing is the presence of entertainment-related programmes on news channels – programmes on movies and celebrities. We really don't need to know what celebrities eat, what they wear and where they go. (India, male, SEC B2C, 35+ yrs)

However, the popularity and spread of *masala news* seems to be mainly confined to the Indian market. In Pakistan, the examples of news stories recalled by the participants in our focus groups mainly fell into the categories of sports and local news, and covered issues such as the match-fixing scandal in cricket, in which the Pakistani cricket team was involved, as well as the murder of a renowned Pakistani political figure in London. However, and not surprisingly, the floods and issues connected to it featured most prominently in the focus group discussions.

2.3 Types of media used to access the news

Media connect events with audiences. They mediate everyday life. Tomlinson has argued that mediation is about 'overcoming distance in communication' (1999: 154), geographically, intellectually and emotionally, while Chouliaraki has suggested that 'mediation' is 'the concept that connects the media as discourse and text with the media as institution and technology' (2006: 3). In that sense, media play a crucial role not only in how we perceive and understand the news, but how we perceive and interact with the world around us.

In the focus groups conducted in Kenya, TV turned out to be the most important medium in everyday life, while radio was the second most important. The findings pointed to certain factors, especially location (which affected programme reception), literacy levels and age categories, that seem to determine which media are used to access news. TV was used across the whole population and was mostly watched at home, although other places such as pubs and workplaces were also mentioned, particularly by people from lower socio-economic backgrounds. The responses were similar across all the groups. Generally, the media through which the respondents access news are TV, radio, newspapers, mobile phones, internet and word of mouth (friends, relatives or even strangers).

Maybe you are sitting next to people in the matatu and then they are talking about something. (Kenya, participant SEC BC1, 18–34 yrs)

If someone else does the talking and you just put your eyes (watch) – even the newspapers, the daily papers are equally good but it requires a lot of energy. You might not have the time to buy the newspapers in the morning and end up arriving home without having looked at it. So it's easier on TV and radio. (Kenya, participant SEC AB, 35+ yrs)

Meanwhile, although radio emerged as the second most important media source, few respondents in our fieldwork stated that they would listen to the radio in order to access news. It was also observed that most of the respondents rarely listened to it at home. Radio listenership occurred when the respondents were moving from one place to another either in the *matatus*, through their mobile phones or played in the *matatus*. Interestingly some respondents thought that international news is broadcast less through the radio platform.

As for me I listen to BBC on radio but I do agree most of the news is local. (Kenya, participant SEC BC1, 18–34 yrs)

I mostly listen to the radio on my way to work. (Kenya, participant SEC AB, 35+ yrs)

Many of the respondents confirmed that they watched or listened to more than one channel or station in a typical evening, a finding that emerged across the five markets investigated. Respondents said that they watched an average of 4–10 channels per evening. This is probably because most lower and middle-class households have one TV set which is shared by members who have different interests.

As many times as possible. Like I come home in the evening I watch news in NTV then I want to watch a movie or a programme that I want to watch on Family TV and if am not asleep at midnight I can watch BBC.⁵ (Kenya, participant SEC C2D, 18–34 yrs)

Reasons that prompted the behaviour of switching from one channel/station to another were mainly curiosity, the perceived difference in the quality of news on different channels/stations as well as a thirst to get ‘satisfying’ news.

I think it is the curiosity to know if the station you are watching has left out some news so you switch to the others to see if they have additional news it could be for your country or internationally. (Kenya, participant SEC BC1, 18–34 yrs)

Another thing that will make me switch from one station to another is if I have seen that that particular piece of news is not in-depth. Some stations have more in-depth news than others, if you listen to this and you are not satisfied you move to the next for information and then you can be able to compare notes and catch up with what you missed. (Kenya, participant SEC BC1, 18–34 yrs)

⁵ In Kenya, international TV channels are relayed terrestrially via local partner stations, often during the night.

There is this thing about specific channels who bring too much of local and less of international while others bring too much of international and less of local so I would switch through them to capture both.
(Kenya, participant SEC BC1, 18–34 yrs)

Presenters of the news also seemed to affect consumption of news from different channels, with certain outspoken presenters being perceived as particularly popular.

Similarly in Egypt, while traditional media like radios and newspapers are still accessed, most respondents prefer to tune into their television sets for news broadcasts. Internet and mobile phones provide easy access to instant news updates. However, out of 64 participants, only 39 stated that they would use the internet on a regular basis, and 20 participants had never used the internet. Thirty-seven respondents stated that they would access news about their country online, while 22 follow developments in other countries online. Young respondents from middle- and upper-class backgrounds, representing a tech-savvy Egyptian youth, seem to be particularly frequent users of the internet, accessing it either in cybercafés or at home. Respondents were asked about the various media through which they access the news. Most preferred television, newspapers, mobile phones, radio or the internet. But word of mouth from friends, relatives or even strangers is still relied on for information on local issues, domestic concerns and public opinion.

Rumors are very effective and it gets passed on from person to person. For example, people say sugar will be more expensive so the majority of people will buy too much sugar before it becomes more expensive.
(Egypt, male, SEC ABC1, 35+ yrs)

Television enjoys the highest usage across all participants, marking it as a clear favourite among the respondents.

We get the news in the newspapers but TV is the media that is mostly used by everyone. (Egypt, male, SEC C2D, 35+ yrs)

Television in other words is a way of life. In the evening, sometimes you watch a programme or movie and then the news comes after it.
(Egypt, male, SEC ABC1, 35+ yrs)

Because that means that we had lunch and finished all our chores and are free to sit down and watch everything we want to. (Egypt, female, SEC C2D, 18–34 yrs)

While newspapers are a traditional and trusted medium, they have a lower access rate than television. Internet is the growing favourite, particularly among young people, together with mobile phones. News updates are

available through mobile phone subscriptions, providing news headlines, sports or weather updates. This service is highly popular, particularly among men of all ages.

I subscribed to this service for news and they deduct five pounds⁶ from my balance for the whole month. (Egypt, male, SEC C2D 35+ yrs)

There is this instant messaging service with a subscription that gives us the latest sports news. I am a member and they send me sports news and also weather updates. (Egypt, male, SEC ABC1 18–34 yrs)

You pay for a specific company and it sends you news from around the world ... it's very cheap, three pounds per month for all kind of news. It's news of two lines ... if you want to know more you can search online or in the newspaper. (Egypt, female, SEC ABC1, 18–34 yrs)

While television and newspaper consumption are confined to a particular time of day, radio and internet usage is distributed throughout the day. However, radio is primarily an ambient medium with very low involvement, unlike others.

In Senegal, due to the power cuts at the time of the fieldwork, many participants could not watch TV or listen to their radios, the most popular and most frequently used media in Senegal besides newspapers. But respondents reported that they had started using other platforms instead in order to continue their news consumption. Mobile phones and the internet in particular gave people the chance not being restricted to a scheduled bulletin to catch up with the latest news.

I use my mobile phone when there is a power cut. (Senegal, participant SEC C2D, 18–34 yrs)

However, accessing the internet via mobile phones was considered too costly by nearly all of the participants, and not as many participants as in other countries, like in Kenya for example, indicated that they would listen to the radio on their mobile phones.

Some of the respondents noted that word of mouth was still one of the most common means of getting information. Family members, friends or neighbours were the most likely sources to give further news. In our focus groups, the internet was mostly used by the age group of 18–34 years and generally young people from higher socio-economic backgrounds (SEC ABC1). The respondents declared that they used the internet to read news articles, listen to radio stations or even watch a few TV stations which are online (France 24 for example).

⁶ Equivalent to approximately 0.55GBP.

Before, there was a problem of accessibility. I was in Kolda before and there you have to wait till the following day to have a newspaper. But now there is internet so we can access news more. And also then there was only one community radio but now more radios and possibility to pick up more TV channels. (Senegal, male, SEC ABC1, 18–34 yrs)

Due to the various platforms available and an increasing number of news providers operating in the Senegalese media environment, people have a much wider choice these days than a few years ago. Most of the respondents, even though they claim some loyalty to a particular news provider, also acknowledged the fact that in a day, they usually watched or listened to more than one TV channel or radio station.

In India, across all the focus groups, TV emerged as the prime medium used to access news, followed by newspapers and then radio as distant third.

The advantage of TV is that you can listen to all the details and watch the pictures as well – whereas in the newspaper you actually have to make an effort to read. (India, SEC B2C, 35+ yrs)

For women, TV is often the only media source used for news.

On the radio, news doesn't seem very interesting. When we are watching it on TV we can see what is happening. The reality is shown on TV – can actually see it. (India, female, SEC B2C, 18–34 yrs)

The internet and news updates on mobile phones emerged in the focus groups as the new and growing platforms for accessing news. Like in the other countries, respondents reported that they would switch between three to four news channels, a behaviour that the Indian participants described as *Channel surfing*. Participants reported that they would commonly switch channels when there was a commercial break between the news, if a channel is spending an inordinate amount of time on (or repeating) a particular news story, or to verify that the news is broadcast on other channels too (in other words, that it is indeed news, and not just a an overly dramatised story).

We keep changing channels – because the repetitions get boring. (India, female, SEC AB1, 35+ yrs)

We want to check on other channels to see whether he is saying right or wrong; whether the news flash is there too – do they have the breaking news there too. (India, male, SEC AB1, 35+ yrs)

Finally, in Pakistan, too, TV was the most frequented medium for news across all focus groups, followed by the internet, the radio, and news updates on mobile phones. Newspapers were also read, but to a lesser degree, which is probably linked to the low literacy rate in Pakistan (49.9% of the whole population⁷). Word of mouth was still considered one of the most important sources for news.

2.4 Connecting the dots: media, everyday life and the closing of moral distance

So what type of news are people interested in and do they consume across the five markets, and across gender, age and socio-economic classes? And which media do they use to access these news, to connect the dots and make sense of events affecting their everyday lives? Our findings suggest that news to a certain degree is culturally influenced, determined by the political and historic background of each market. This became particularly evident with the example of *masala news* in India, but was also illustrated at the example of the highly popular political satire show *Hasb-e-Haal* in Pakistan. In all of the five markets, a majority of the people across gender and age and socio-economic groups is mainly interested in local and national news. While they do seem to consume news from international providers, too, this mainly seems to happen during times of national or international crises. The exception was in all countries focus group participants and interviewees from higher socio-economic classes, who reported that they consumed news from international providers more regularly, and who consumed news on international affairs on a regular basis, too. Most people in the urban areas where we carried out our fieldwork consume news through TV. These findings may vary in all of the five markets for rural areas. An increasing number of participants in all countries said they would use their mobile phones to access news, be it to listen to the radio on the mobile phone on the *matatu* in Kenya, or to receive news updates on mobile phones in Egypt. But it was mainly the more affluent and the younger participants who stated that they would access the internet (in cybercafés, at work or at home) for news. The facts that most people are mainly interested in national news, and that locality, as well as language, tone and format, seemed to be decisive factors in how authentic, trustworthy and favourably respondents across the five countries perceived different news stories, suggest that at least a part of responsibility of how people connect the dots between their own lives and the wider world lies with the broadcasters. As Silverstone (2006: 28) has argued:

⁷ CIA World Factbook, 'Pakistan', <https://www.cia.gov/library/publications/the-world-factbook/geos/pk.html>, accessed Dec. 2010.

... we live in a world with others who are not like us, but also in a world in which, precisely, it is the commonality of difference that is shared. This is what constitutes the world as plural. Our everyday lives were not necessarily lived in ways that forced the issue, at least on a scale beyond the face-to-face of village or community. But now they are. The mediated globe involves lifting the veil on difference. ... The problem is that while global media have lifted the veil, they have provided few or no resources to understand and respond to that difference, nor do they necessarily represent it adequately.

Trust therefore, it seems, is not only evoked by a message, but by the messenger, too. The following chapter investigates the perceptions of different media providers by consumers, and examines how editorial values reflected in news coverage shape consumers' attitudes to and perceptions of the different providers in the five markets.

3 Awareness, usage and perceptions of different local, national and international news media

This chapter investigates the question of how consumers perceive different international providers in the different countries, and which providers they trust.

3.1 Kenya

The findings from our fieldwork in Kenya suggest that different attributes determine choice and trust in different local and international providers. The following reasons seemed to be paramount to the success of a provider in terms of high viewership or listenership:

- Whether the programmes were repeated or not

Some other stations bring news that has already been aired by another station, so you would go for the one that brings the fastest news. (Kenya, participant SEC BC1, 18–34 yrs)

An interesting channel is one that doesn't repeat programmes. (Kenya, participant SEC BC1, 18–34 yrs)

- Presenters

Some (presenters) are boring. [But] e.g. Swaleh Mdoe always talks about the stories that his grandfather told him. I like his way of presenting. (Kenya, participant SEC BC1, 18–34 yrs)

I like the news presenter Vincent Makori ... I like the way he talks, it is very easy to understand everything, it is not like CNN's Zain, she is fine but I like VOA because of Makori. (Kenya, participant SEC AB, 35+ yrs)

- Language used

Apart from BBC you find that Al-Jazeera at times broadcast in Arab, France 24 in French and some providers in German. For people who don't understand this language it is hard for them. (Kenya, participant SEC BC1, 18–34 yrs)

To get a feeling of the respondents' appreciation of the channels and stations, the participants were asked to make a comparison between local and international providers they had been exposed to. Table 3.1 shows the aspects that emerged.

Local	International
Positive aspects	
Live coverage	Live coverage
Where information is lacking, they collaborate with international partners	Have presenters in many countries
Language: News can be consumed by the majority of the population because they use local understandable language	News had accurate/in-depth information
Cover local news, as illustrated in this comment made by a participant	Expose hidden information
	Use advanced technology
	The news is presented in unpredictable format (spontaneous)
Negative aspects	
Do not expose all information- sometimes reporters are denied access to certain information	Poor values/morals e.g. dress codes
What they report is borrowed from international channels thus not updated, delayed	Eroding local language
Poor technology – frequencies do not reach some rural areas	Information is not accurate (sometimes) & negative
Reporters or station centers not present everywhere	Competition against local stations/ channels
The flow of the news is predictable –	Language: Alienates a segment of the population particularly illiterate people (who do not understand the English language)
	Perceived to be pre-occupied with terrorism news or war stories
	Local news shown in international channels was often perceived as patronising

Table 3.1 Differences between local and international providers in Kenya

The level of awareness of news providers was high amongst the respondents across all of the focus groups. The preferred TV providers that emerged across the focus groups were Citizen and KTN (local) and Al-Jazeera and CNN (international). Although all the participants were aware of the state-

broadcaster KBC, most participants perceived it as a mouthpiece of the government.

Participants in the focus groups reported a great appreciation for international providers with regard to their in-depth information and morals regarding the protection of underage viewers from certain content. However, some of the respondents suggested that international providers like the BBC and CNN would portray a negative image of Africa.

Al-Jazeera emerged as the most positively perceived and trusted international provider, followed by CNN and BBC. One of the main reasons why Al-Jazeera was preferable compared to other international channels is because it has its own terrestrial channel and is aired 24/7, while the other international channels have specific slots (although the BBC was at the time of our fieldwork not available on any TV partner station). Another important reason why Al-Jazeera was a preferred news provider was because some of the presenters were Kenyan. Al-Jazeera was described as unbiased, focused, up to date, entertaining, independent and reliable.

In Al-Jazeera I heard someone like Kamau reporting and I felt appreciated as a Kenyan. (Kenya, participant SEC C2D, 35+ yrs)

I like Al-Jazeera because it is 24 hours, you don't have to wait for it like CNN. And the best thing with Al-Jazeera is that they repeat their stories so you can catch it any time. It is very common nowadays. (Kenya, participant SEC C2D, 35+ yrs)

CNN emerged as the second most trusted international provider of news. All the respondents were aware of CNN. It was generally perceived positively – evident in the words the participants used to describe it: informative, established, clear, entertaining, independent, trustworthy and reliable. However, a number of participants perceived it as too 'pro-American', thus showing more stories from the USA than African countries, and at times being negative when broadcasting news on Africa.

Meanwhile, the BBC was more identified with radio, but was perceived as a trusted and established broadcaster. BBC radio has wide national coverage in Kenya that reaches people even in the remotest areas. Therefore, to many Kenyans living in rural areas, it is still the main source for international news. BBC radio listenership was particularly high during the pre-liberalisation era when freedom of the press was limited. This seems to be why the level of awareness of the BBC was high among the middle-aged and older respondents, but lower amongst the young participants. The BBC was perceived as one of the oldest providers in the market. Although its long existence made respondents perceive the BBC was established and trustworthy, some respondents felt that the BBC had never changed. The BBC

was described as informative, educative and fair. Interestingly, in the personification exercise, in which people had to describe providers as if they were human beings, the perception of the BBC was very similar across the groups. In the eyes of the respondents the BBC was an older, wealthy man, over 50 years of age.

BBC is on radio but we don't listen to it. BBC ... they do not change. They are the way they were when I was still young. (Kenya, participant SEC C2D, 35+ yrs)

Local news providers have gained popularity in recent years, since liberalisation. It was therefore not surprising that most respondents mentioned local news providers as their main and first choice for news. Free-to-air terrestrial stations which dominate the TV landscape in Kenya were most frequently mentioned. These include KTN, NTV and Citizen. Vernacular radio stations such as Ramogi FM, Inooro, Kameme FM, were mentioned as local sources of news.

I listen to news from Ramogi FM because that is the language I understand most. I also listen to Citizen because I understand Kiswahili too. (Kenya, participant SEC C2D, 35+ yrs)

Citizen TV emerged as the most popular and most trusted local TV provider across the focus groups, closely followed by KTN. Citizen TV is owned by Royal Media, a multimedia house which also owns eight radio stations, most of them local (relayed in vernacular languages) but together covering the bulk of Kenya. Citizen TV began broadcasting in 1998. It broadcasts both current affairs programmes and entertainment. Respondents felt that Citizen TV was the most up-to-date and investigative channel.

The Kenya Television Network (KTN) run by the Standard Group is one of Kenya's eight privately owned broadcasting stations. When it was founded in 1990, it became the first non-pay privately owned TV station in Africa and the first to break KBC's monopoly in Kenya. KTN became famous for activism journalism in the 1990s, branding itself as the 'authoritative and independent' news channel.⁸ The qualitative results from the study support this background information. KTN emerged as one of the preferred local news providers. It was described as clear, having authority, and being very informative due to its investigative style.

⁸ <http://www.ktnkenya.tv/>, accessed Dec. 2010.

On TV I have to watch the 7 o'clock news in the evening especially KTN because they are very good in their coverage and give in-depth stories. (Kenya, participant SEC C2D, 35+ yrs)

In KTN there is a feature that they bring Jicho Pevu I haven't seen other TV stations with such investigative news. (Kenya, participant SEC BC1, 18–34 yrs)

They are always strategic in their planning so for any breaking news they would be the fastest to bring it to you. (Kenya, participant SEC AB, 35+ yrs)

However, based on its investigative style, some respondents perceived it as too biased.

KTN is biased against the government. (Kenya, participant SEC BC1, 18–34 yrs)

KTN's partnership with CNN seems to be beneficial because many respondents said that they watch CNN through it.

Other channels, such as Nation TV, were mentioned by participants, too. However, Citizen and KTN were generally the most mentioned and trusted TV providers.

3.2 Egypt

In Egypt, one of the most competitive markets examined, people are most aware of local and pan-Arab providers. Local providers seem to offer relevant local content on locally salient issues. They touch people's everyday life. However, due to a restricted and controlled domestic media environment, credibility emerged for all of these providers as an issue across the focus groups.

All the respondents were aware of pan-Arab channels, such as Al-Jazeera and Al-Arabiya. They were perceived as providing good-quality, unbiased content and as understanding the cultural aspects of Egyptian society. However, respondents felt they do not always understand local sentiments.

Meanwhile, international media such as CNN or BBC World were perceived as providing an unbiased perspective with depth and quality of news, but were watched or listened to on a regular basis only by the elite. In general, international media were perceived as sometimes not understanding the context and constraints of local Egyptian society. Interestingly for the BBC, hardly any of the focus group participants of the younger generation seemed to be aware of the provider, nor could they say, when they were prompted, which country the BBC was from.

Overall, Al-Jazeera, together with Al-Arabiya, emerged as the most watched and, for some, as the most trusted of the channels, together with the local channels El Mehwar, Dream and the government-owned Channel 2.

Al-Jazeera was the first international Arabic news channel in Egypt and therefore has a special place in the market and in people's awareness. Among the participants, it was praised for its extensive network and the speedy coverage of news, as well as quality programming, featuring an impressive panel of experts.

Al-Jazeera is fast and shows us the event before any other channel. And it is near all events so it airs the news even before any Egyptian channel. (Egypt, female, SEC C2D, 35+ yrs)

Most importantly, in contrast with other international news channels, participants repeatedly stressed that they feel they can relate to the content.

It is an Arab channel and so its concern is the same as ours, besides we can understand everything they say not like with the CNN. (Egypt, male, SEC ABC1, 18–34 yrs)

However, recent developments seem to have split opinion among Egyptian audiences. In their view, over recent years too many unflattering stories about Egypt have been covered on Al-Jazeera, prompting a belief that the channel wishes to affect the image of the country. In most of the focus groups, a recent tussle between the Egyptian government and Al-Jazeera, which held exclusive broadcasting rights for the FIFA World Cup, came up. Al-Jazeera seems to have lost some of its popularity 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 participants, many Egyptian consumers resented Al-Jazeera's coverage and said that they no longer felt that they could fully trust Al-Jazeera as a news source, particularly when it comes to news about Egypt.

I watch Al-Jazeera all the time and any news I need to learn about I just switch on Al-Jazeera ... unless it has to do with Egypt because it is well known that Al-Jazeera is against Egypt. But if it has to do with any other Arab country I watch Al-Jazeera at once. (Egypt, male, SEC C2D, 18–34 yrs)

In June 2010, Al-Jazeera Sport's World Cup broadcasts carried by Egypt's Nilesat operator and Arabsat of Saudi Arabia (*Wall Street Journal*, June 2010⁹) 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.

Other participants disagreed with this stand, and expressed that in their opinion the channel is brave enough to air stories that are unpopular and that other channels do not air.

It doesn't hide and is not afraid to say anything. In Egypt if anyone will say anything which is not safe they will edit it. But in Al-Jazeera they say everything in the programme ... anyone can call and say whatever he wants. (Egypt, female, SEC ABC1, 18–34 yrs)

Al-Arabiya was the second most mentioned pan-Arab channel, particularly among men from lower socio-economic status. These participants felt that the news was trustworthy and particularly appreciated the channel's news presenter, Essam Al Shawaani.

They show all the news that has to do with Arabs or Europe and they don't take a side against Egypt. (Male, SEC C2D, 18–34 yrs)

Other pan-Arab and international channels did not warrant much discussion among respondents. Not many participants were spontaneously aware of BBC Arabic, although some of them recognised the provider when prompted. Especially many of the younger people had not heard of the BBC before. The participants who had watched the channel found the news trustworthy and appreciated the global coverage and reach.

They broadcast clear and honest opinions. We have always been attracted by its credibility and good reputation and they have been here for so many years. (Egypt, male, SEC ABC1, 35+ yrs)

However, some participants mentioned that they felt BBC Arabic would not connect with Egyptian audiences, and that the Arabic was hard to understand.

They mostly speak about Europe, France and Germany and they don't talk about the Middle East enough or Egypt which interests us mainly ... The

⁹ 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 Aug. 2010.

BBC can pass a whole day without mentioning Egypt even once. (Egypt, female, SEC C2D, 18–34 yrs)

BBC Arabic's style is so calm, but on Al-Jazeera it is more enthusiastic and we feel more than we hear, so they should put more life into the news. (Egypt, female, SEC ABC1, 35+ yrs)

It lacks the Eastern spirit and enthusiasm. (Egypt, female, SEC ABC1, 35+ yrs)

Meanwhile, France 24 was not well known amongst the participants. Those who knew the channel were aware that it is primarily a French channel with some dedicated hours of Arabic programming.¹⁰

Sometimes we watch the two hours of Arabic broadcast from 12am to 2am but mostly they speak French. (Egypt, male, SEC ABC1, 35+ yrs)

Local channels elicited positive responses across all focus groups. However, most of these positive responses were associated with specific presenter personalities or popular content aired on those channels, rather than the channel brands. 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, as was the current affairs show of the outspoken presenter Moataz Al-Demerdash, *Teseen Dakeeka* (90 minutes) on the El Mehwar satellite TV channel, or indeed the highly popular *El Beit Beitak* (*Feel at home*), which was recently renamed to *Masr Inaharda* (*Egypt today*), presented by Mahmoud Saad and colleagues on Egypt's Channel 2 (previously on Channel 1).

The most watched show is on Al Mehwar ... if I want to know about something or make sure of it I just watch 90 minutes with Moataz. (Egypt, female, SEC C2D, 18–34 yrs)

Moataz is very popular. We feel very close to him. (Egypt, male, SEC ABC1, 35+ yrs)

About local shows, we have El Beit Beitak ... Mahmoud Saad discusses topics from different angles and he hosts famous names from the high society. He also discusses artistic and sports topics. (Egypt, male, SEC ABC1, 35+ yrs)

¹⁰ The Arabic service of France 24 began in Apr. 2007, broadcasting for 4 hours a day, which was increased to 10 hours a day in Apr. 2009 (i.e. also during our fieldwork in Egypt). In Oct. 2010, the channel began broadcasting 24 hours a day. France 24 is the first French TV network to provide a 24/7 news service entirely in Arabic (France 24, <http://www.france24.com/en/20101012-france-24-arabic-channel-goes-24-hours-north-africa-middle-east-news-television>, accessed Dec. 2010).

[Al Ashira Masa'an] discusses all the news that happens daily ... local and international. Mona, the hostess, interviewed the American president. (Egypt, male, SEC C2D, 18–34 yrs)

3.3 Senegal

In our focus groups in Senegal, we asked our participants to make a comparison between local and international providers they have been exposed to. Many differences emerged between local and international providers of news. The first and most obvious difference was accessibility. Local providers are more accessible than international media. The former are picked up free of charge and even without a satellite dish or a special antenna. For international news providers, depending on the media company, a specific antenna coupled with a decoder is needed to gain access. The other differences that were mentioned are listed in Table 3.2.

Local	International
Positive aspects	
Interactivity: Viewers or listeners can call in to participate in a programme	Give people the possibility of being informed about what is happening around the world
Proximity: they can easily be contacted to report on a local event and create awareness locally	Capacity to inform in real time on an event;
They report on other parts of the country and are interested in informative news for Senegalese which international providers might not find interesting to air for a global audience	Complete in their news presentation; detailed and in-depth analyses of issues
They broadcast in the local languages (Wolof, Al pular, etc.)	Information clear, objective and trustworthy
Walfadjiri which many respondents seem to like is deemed fearless and ready to report on hot and hard issues; organise political debates and invite the various protagonists; also have interesting social and cultural programmes	Independent, free and none partisan
They play a democratic role in the country, analyse critically the words, actions and activities of the government and play a counter-balancing role	Punctuality, seriousness and professionalism (news are broadcast on time and there are practically no errors from the broadcasters and in the sequencing of the images)

	Better equipped
	The news set is good-looking and appealing with presentable journalists
	For debates on current issues experts are called upon
	They have correspondents in many parts of the world
Negative aspects	
They are closely monitored by the government, hence a lot of auto-censoring in their news presentation	Need a subscription to view them
Lack of independence, especially for the public media	Often report on Africa or the Middle East when there is something grave or disastrous happening
News sometimes do not start on time	They do not portray Africa in a positive light
Underequipped	Islam is linked to terrorism and portrayed unfairly
Lack of professionalism sometimes	News is repetitive and sometimes boring for somebody who would like to watch a channel for a longer period of time
Showing soap operas which are not compatible with African values and tradition thereby corrupting the young generation	They easily influence the political situation in an African country (RFI with Guinea and Côte d'Ivoire)
Some information not well verified before being aired thus misinforming the viewers	Do not air in local languages for the less educated
Interested mostly in political issues	
The public media reporting more on the government and their activities and not much on the opposition parties or events not favourable for the ruling party	

Table 3.2 Differences between local and international providers in Senegal

The majority of the respondents reported that they would read, listen to or watch the local media more frequently than they consumed international media. The only focus group that stood out in this regard and favoured the international providers compared to the national media was the focus group composed of men aged 18–34 years, of a middle- and upper-class socio-economic background, in other words, opinion leaders. However, most respondents preferred private local media.

I prefer the media in Senegal. First you need to keep abreast with what's happening locally. Moreover, our media also give us international news close to the end of the news. (Senegal, female, SEC ABC1, 35+ yrs)

Participants seemed to distrust the public media provider, RTS (Radio Television Senegalaise), which operates two radio stations and one TV channel. All of these radio stations and channels are government-owned and controlled. The respondents rejected RTS because of its lack of independence and objectivity, especially with regard to politics. They viewed it as the mouthpiece of the government and not a provider responding to their needs and interests.

Especially in politics, when there is an election, it's the President who is given more airtime than the other candidates ... People tend to say that RTS belongs to Abdoulaye Wade. (Senegal, female, SEC ABC1, 35+ yrs)

If we take the example of Casamance, though I don't usually listen to the national public radio, but I have never heard RTS talk about the problem of Casamance¹¹ and say what is happening there, contrary to other local private media. They always have something to hide. (Senegal, participant, SEC C2D, 35+ yrs)

Among the local media that were spontaneously mentioned during the discussions, Walfadjiri, which operates a TV and a radio station, took a prominent position when it comes to news. Then comes RFM (a radio station) and 2STV (a TV station). However, canal info, a local medium solely dedicated to news was not mentioned as often as the other three providers.

Walf is unlike the other local media. They are bold enough to show us everything when they are given the authorisation to go on the ground.

¹¹ Casamance is a region in the south of Senegal which has been fighting for independence since 1982. There have been sporadic exchanges of gunfire between the government forces and the rebels and no peace initiatives so far have been able to settle the conflict.

For example, it is only RTS that's given the authorisation to follow the government to some places. So in such places for example, other media don't have the information. Moreover, RTS doesn't show us all, they hide some parts. Walf shows the living conditions of Senegalese people, they are courageous enough to show what others can't show.
(Senegal, male, SEC ABC1, 18–34 yrs)

A few international news providers are popular in Dakar. RFI (radio station) and TV5 (TV channel) have been present in Senegal for many years and access to them is free. Though the BBC can be picked up locally via the FM band, few of those interviewed really listened to it. Those who did, see in the BBC an opportunity to learn or improve their English. The majority of the people however, due to the language barrier, hardly listen to the BBC. Many do not know that the station has a French service section. A couple of the participants who had heard about the provider assumed it was a music station.

The majority of TV news providers are accessible through subscription. In Senegal, mainly three media companies are competing in this sector: Canal + Horizons, Excaf Telecom, Delta Net TV. The average Senegalese cannot afford the monthly cost of these. Therefore, as participants reported, people have devised illegal means to circumvent the subscription fees and to access these foreign providers. In fact it has become a business for some technicians. With one subscription, a technician connects as many houses as possible on a street. The connected individuals or households pay a modest sum. The technician receives all the money and only pays the regular amount for one subscription to the media company. When asked if they felt that the media companies were aware of these illegal connections, a heated debate ensued. Some thought that these technicians collaborated with employees in the media companies and gave them hush money. Others, to exonerate themselves, declared they did not know and that it mattered little to them as they can now watch the foreign channels previously beyond their reach. This situation seems to have created greater awareness of international news providers in general.

Besides these subscriptions, audiences have the opportunity to tune in to international channels via local partner stations at certain times of the day and during the night. RDV, a local TV channel, for example airs France 24 at certain hours of the day, and 2STV, another local TV channel, which is quite popular, gives viewers the opportunity to watch Euronews. Radio Dunya carries the BBC, while Top FM is the partner station of VOA in the evenings.

Online news providers which were reported across the groups by those participants who were using the internet included aminat.com; bouba.com,

xibaar.net, feerlo.com, rewmi.com, facebook.com, yahoo.com and hotmail.com.

In terms of awareness, when it comes to radio stations, RFI was the most frequently mentioned international provider.

3.4 India

The awareness of the different news channels, both national and international, was high in our focus groups in Mumbai, although there were some that people had heard the names of but about which they knew very little.

Local	International
Positive aspects	
More local news	Broadcast world/international news
More live news	Quicker for world news
In Hindi	Don't dramatise or exaggerate
Greater connectedness	Professional
Reception is good	More informative
Give all kinds of news related to India	Crisp, to-the-point reporting
Vibrant, lively & young	
Negative aspects	
Too many ads	Not enough news coverage on India
Repeat same news over & over again	Dull to watch
Made-up/make news out of non-news	More serious – Indian channels have a younger feel
Exaggerate news	BBC and CNN are often disconnected by cable operators (because of pricing)
Irrelevant news on celebrities	Presenters lack expression – 'they have measurable smiles, they don't move their faces much'. Presenters on Indian channels are more expressive.
Overly dramatic presentation – makes them amusing and less credible – 'you feel confused whether they are telling the truth or not'	

Table 3.3 Differences between local and international providers in India

Although all participants were aware both of national and international channels, participants overall seemed to prefer domestic providers. The majority of the participants suggested that the local Hindi channels are easily accessible and that they provide news on events and topics that people are interested in – events in their region and in India. The participants expressed a sense of familiarity and ‘Indianness’ about these national channels, rendering them more accessible compared to the international channels. By contrast, international news providers were perceived as more professional and efficient, but as difficult to connect with. Sometimes literally, because cable operators disconnect these news channels,¹² but also emotionally: international channels were perceived as more distant. And the mannerisms of their reporters were perceived as more controlled and less friendly.

The following channels emerged as the ones people were most aware of:

- 1 Aaj Tak
- 2 Star News
- 3 Zee News
- 4 CNBC
- 5 India TV
- 6 Star Maazha (Marathi channel)
- 7 BBC
- 8 CNN IBN
- 9 Sahara Mumbai (on Mumbai – for local news)
- 10 CNN
- 11 Times Now
- 12 Headlines Today
- 13 NDTV India
- 14 TV 9 (on Mumbai)
- 15 NDTV 24/7
- 16 Tez

Only a few participants, who were from a higher socio-economic and educational background or for whom international news directly impacted their entrepreneurial activities, ranked international news channels among the top three most often watched news channels.

Dramatising the presentation of a news item is one thing – but devoting an excessive amount of time to a particular news item, repeatedly showing the same coverage over and over again and exaggerating (by tone or content) was disliked across segments. This trait was particularly associated with Hindi news channels.

¹² In certain neighbourhoods, CNN and BBC had been replaced with CNN-IBN by the local cable operator.

In the context of 24-hour news coverage by many channels and different news items being covered across different channels, there is a need for programmes that focus on 'real' news. Respondents therefore find short, focused programmes like the ones mentioned below, appealing.

- Zee News *Top 20*: 'I personally like this – it very quickly shows 20 major news items of the day and the news is all mixed – from sports, business, Bollywood etc.' (India, female, SEC B2C, 35+ yrs);
- Star News *Bullet kee Raftaar (Speed of a bullet)*: 'show all the major news items in a minute' (India, female, SEC B2C, 35+ yrs);
- Aaj Tak *Fatafat News (Quick news)*: 'they give about 20 news items – it's really fast. So that's good. We don't need post mortems on news items – we just need news – fast' (India, male, SEC AB1, 35+ yrs).

CNBC emerged as an interesting case in the fieldwork. While it is seen to have most of the strengths of BBC and CNN, its biggest advantage according to the participants is that it has an Indian face. Among Indian channels there is a greater emotional connection with Hindi news channels than the English ones. There were some who mentioned NDTV 24/7 and Headlines Today, as their preferred channels, but for most it was Aaj Tak, Star News or Zee TV.

Aaj Tak – we have lot in common with Aaj Tak – It's like a routine of our life. We feel related to it. (India, female, SEC AB1, 35+ yrs)

I feel when we have a problem in our home we can call our national channels, but neither BBC nor CNBC will come. (India, male, SEC B2C, 35+ yrs)

I would be comfortable with Star News – he is more practical ... more my type – not too intellectual, very interactive, interesting. (India, female, SEC B2C, 18–34 yrs)

Interestingly, between Aaj Tak, Zee and Star, Aaj Tak is seen as a specialist when it comes to news:

Aaj Tak has stayed in our minds more as a news channel while Zee News, because it comes from the Zee family – doesn't really seem like a news channel. (India, male, SEC B2C, 35+ yrs)

International news channels were perceived as having more expertise and knowledge and as giving news in a more succinct and straightforward manner. They are also seen as being more professional and committed to providing accurate news. These channels are trusted when it comes to the news coverage they provide, whether on national or international events.

For honest news it is BBC. For truth on national news – I would go to BBC, because other channels due to political pressure may hide stuff from us. However, BBC will give a very brief report – we would want more details on national issues. (India, male, SEC AB1, 18–34 yrs)

Aaj Tak and Zee News are general practitioners and only BBC and CNBC are specialists. They are to the point. (India, male, SEC B2C, 35+ yrs)

CNBC and BBC continuously show news without ads – which shows that they value your time, unlike Indian channels that are only interested in making money. These channels are more dedicated to giving accurate news – other channels are after money. (India, male, SEC B2C, 35+ yrs)

There should be a certain maturity like CNN or some other channel, so that watching that gives you some food for thought ... CNN and BBC are mature – they talk from their 'brains' (heads) and less from their heart. (India, male, SEC AB1, 35+ yrs)

However, there is an emotional distance from these channels. They are admired – but are not 'one of us'. Respondents said that, of all the channels, the international channels would be the ones they would be hesitant to approach and make friends with. The style of language (e.g. the style of English spoken, the words used, etc.) and the presenter are clearly barriers in making a connection, as is the perception that it is a foreign channel. The BBC was seen as the foreigner who they would wish to impress – not someone they would open their hearts to.

3.5 Pakistan

In Pakistan, the awareness of news providers, both national and international, was high. However, people generally seemed to be more aware of national and local channels. The differentiations in Table 3.4 were made between national and international providers by the participants.

Local	International
Positive aspects	
Give people a chance to express themselves	Freedom of censorship
Expose wrongs in the society and system	Worldwide coverage
Try to get justice for citizens	Provide detailed, accurate information with facts & proof
Presenting hard facts in a comic way	Broadcast positive news
Breaking news about national and local stories	Large networks
Negative aspects	
Reports local news only (with details)	Portray Muslims countries in a negative light
Restricted & regulated by the government	Do not provide local news in detail
Lack of follow-ups on stories	Represent the policies of their own countries
Excessive commercials	Language is hard to understand
Repetition of stories	
Exaggerated details	

Table 3.4: Differences between local and international providers in Pakistan

With regard to international providers, participants spontaneously recalled the BBC, CNN, Fox and Sky. Very few participants recalled Al-Jazeera and Bloomberg. Three Indian channels (Doordarshan, Star News and Zee News) were also recalled. However, other international channels such as France 24, Radio China and CCTV News and Russia Today were not known, even after prompting the participants. Al-Arabiya, VOA and DW were recognised after the moderator prompted, but were not spontaneously recalled. BBC and CNN were the most watched and the most trusted international channels.

We would prefer watching international channels for example when our team was under allegation outside the country. Although our [local] reporters were there, we would watch the BBC or CNN for authentic news because they have more resources. Like in the 9/11 bomb blast, the BBC showed it first and then Geo copied its video and broadcast it. (Pakistan, male, SEC CD, 18–34 yrs)

On the radio, at the time of the research (September 2010) BBC Urdu was available on FM103. Other channels also provide news on and off but BBC Urdu emerged as the most popular international radio service for news updates.

However, its perceived trustworthiness was questioned by other participants, who felt that international providers sometimes were biased against Muslims:

[International channels] don't highlight those things much which are against Muslims, e.g. a few days back there was the news about burning the Qur'an which was not condemned that much by international channels ... (Pakistan, male, SEC CD, 18–34 yrs)

... if Muslims are slightly wrong somewhere, they would exaggerate it. (Pakistan, male, SEC CD, 18–34 yrs)

The national channels most participants were aware of were Geo, Express and PTV (the state-owned provider).

We prefer our national and local channels, as we are interested in our own news. We watch Geo first, and then Express news. (Pakistan, male, SEC CD, 18–34 yrs)

However, across the focus groups participants stated that they would prefer and trust Geo, Express and Dunya most, perceiving PTV as a mouthpiece of the government.

PTV is all fake and is not worth watching because it doesn't tell anything which is actually happening in town. It always says everything is fine and there is peace in Pakistan, but when you move to other news channels you will come to know of a bomb blast somewhere. (Pakistan, male, SEC CD, 18–34 yrs)

As in the other markets considered, the language in which the broadcasters broadcast their programmes was one of the main barriers for access to international providers. As one participant explained:

There is a problem of language, that's why we prefer local channels over international channels ... There is a language barrier. We are able to understand news in our own language more easily. (Pakistan, female, SEC AB1, 35+ yrs)

And similar to the other markets, participants also stated that they would often consume specific programmes because of the format or the presenters, rather than the provider:

It's actually its authenticity. For example, you might like a specific programme on some channel, like Capital Talk on Geo. (Pakistan, male, SEC CD, 18–34 yrs)

One reason [why we watch some channels more than others] is the type of programmes shown, like Hasb-e-Haal, a programme shown on Dunya where Sohail Ahmed talks about the problems of the common man. [It] is an amazing programme. (Pakistan, male, SEC CD, 18–34 yrs)

3.6 Summary

In all of the five markets, respondents across all age- and socio-economic groups seemed to recognise national providers more readily than international ones. In addition, not only were participants across the five countries on average more aware of national providers than international providers, but private national and in some cases pan-Arab providers also seemed to be more popular than international providers across the focus groups, with the exception of people from higher socio-economic background. People from a middle- and upper-class background seemed to access international media more regularly than their fellow participants from lower socio-economic backgrounds. This leads to the question of trust. Does trust somehow play a role in the consumption of different providers, both local and international? Do cultural or political contexts influence trust in different providers? These questions will be investigated in more detail in the next chapter.

4 Trust and consumption

This chapter examines trust in the five markets and investigates how trust affects the consumption of news from different providers and across platforms. Trust has been assessed at two levels, namely sources of trusted information and consumption of international news and trust.

4.1 Changes in news consumption

If one believes certain popular authors, we live in an era of complex connectivity (Tomlinson, 1999), a 'flat world' (Friedman, 2005) in daily lives permeated and constructed by a globalised media machine. While developing countries yet have to fully catch up on these rapid developments, what has changed in the five markets examined in this study over the past decade is the liberalisation of their media environments and the access and availability of media in everyday life.

In *Kenya*, news consumption in the past five years has changed positively according to the respondents of the focus groups, offering viewers and listeners a wide diversity of channels and stations to choose from. All the respondents agreed that what has changed most over the past five years is the technology, the variety of stations/channels and the style of presenting the news, as well as more innovative and interactive formats of broadcasts.

I think it is the technological change which has erupted a lot of stuff ... things like TV because during my time watching a great wall TV was a very big thing you know [laughter]. Nowadays people are going for full screens, LCDs, plasmas. People want to give themselves the best. That also has transformed the ideas of people and more channels are coming in so we can get more than one, two or three channels. (Kenya, participant SEC C2D, 18–34 yrs)

People are more interested in wanting to find out what is happening around, from school kids to the old. (Kenya, participant SEC BC1, 18–34 yrs)

Freedom of Press – Maybe back then they couldn't bring some things for fear of being a victim. (Kenya, participant SEC BC1, 18–34 yrs)
Media is covering more things, they have more freedom. Before, they used to fear being victimised. They have to be keen on what they write back these days. KTN shows the real politician in Kenya e.g. programme Mheshimiwa shows where he started from and how he has moved up. (Kenya, participant SEC BC1, 18–34 yrs)

Meanwhile in *Egypt*, a difference seemed to exist between male and female participants in how they assessed the changes. Men noticed changes in media options while women also noted changes in content. The observable changes, according to the respondents, were twofold. First, they could be observed in the *media content*: according to the focus group participants, there has been a general improvement in quality of programming, along with bolder content than what was broadcast in the past. Talk shows, debates, etc. have become common along with regular news programmes. There is also an increase in the variety of online content, for example in blogs.

Now we enjoy freedom of broadcasting news and there are a lot of bold conversations on TV. (Egypt, female SEC C2D, 18–34 yrs)

Second, changes can be observed in *media options*: respondents reported an increase in variety, with the introduction of new and improved technology and media at lower costs. They illustrated this by referring to the increase in television channels, improved internet speed and internet surfing on mobile phones.

There are many programmes on TV and so many channels and we can access the internet on the phone. (Egypt, male, SEC ABC1, 18–34 yrs)

We used to have only two channels but now we have six land channels and 400 channels on the dish. (Egypt, female, SEC C2D, 35+ yrs)

Senegal has seen very similar changes, although *Senegal's* media market is not (yet) as competitive as *Egypt*. However, *Senegalese* consumers reported:

Around 2005 and 2006, the platforms were not many ... But now there is competition, more TV, more radio, more newspapers. Hence I am more interested in news now than before. (Senegal, male SEC ABC1, 18–34 yrs)

I now have more access to news on the internet. And for TV, I didn't have access to all the channels that I watch today. I was only watching RTS. I now have more possibilities. (Senegal, female SEC ABC1, 18–34 yrs)

In *India*, which was the most competitive of the five markets investigated, when probing what has changed over the last five to seven years in the access and use of news media, it is obvious that while there are many more sources from which news can be accessed today, the quality of reporting and the kind of news being covered is also perceived by focus group participants to have undergone a change. Respondents reported that today there now exists a much wider choice of channels and more options. There is 24-hour news coverage and reporting, instant news and live coverage. News channels are

unique in India in that they broadcast a lot of 'non-news' items, programmes on astrology and celebrity news.

Earlier you had to wait till 9pm to watch the news. Now it is on all day on all channels. Earlier I used to love watching 'The World This Week' by Prannoy Roy – now it is not relevant, because news is updated every hour, every minute – you don't need a week to know the news. (India, male, SEC B2C, 18–34 yrs)

In the past two years, I have noticed that every channel begins the morning with a programme on astrology – where they predict your future. Are they aware of their own future? I don't like such programmes. (India, male, SEC B2C, 35–50 yrs)

This highly culture-specific content and format of broadcasting may make it difficult for international broadcasters to succeed in the Indian media market (combined with a highly complex and untransparent media policy and regulatory structure). Participants also reported a marked increase in sensationalism in the news reportage – more of the so-called *masala news* (Indian term for spicy, shocking, dramatic).

First it was to serve people. There were no exaggerating statements – but now there are. Earlier their objective was to serve – now it is to ensure profit. (India, female, SEC B2C, 18–34 yrs)

One of the respondents suggested that the increased competition has led to a shift away from the competition of breaking news to the competition for which provider has the most sensationalised news story to broadcast:

Earlier channels competed as to who would deliver the news first. The breaking news – who will cover it first. Now it is not like that – now if one channel shows some breaking news, the other channel shows some other breaking news – they are having a different kind of competition. They run after a more dramatic story. (India, female, SEC B2C, 18–34 yrs)

Also in *Pakistan*, focus group participants reported that, in their views, news media have evolved significantly over the past three to five years. According to them, the most striking change is the increased freedom of the private media, which can now broadcast more critical issues, but at their own peril. Those who felt that the media were not free used examples of the recent taking off air of channels such as Geo and ARY for showing the shoe thrown at President Zardari in London during his visit at the time when the floods hit

Pakistan. Participants reported that, on a number of occasions, channels, especially Geo, have been banned and taken off air for reporting government wrongdoings, indicating that the media are not free. Therefore, some channels, like Dunya with its popular political satire show *Hasb-e-Haal*, have taken to using satire to broadcast criticism of the government or certain politicians.

At the same time, participants commented on the increased competition which has led from there being only one, state-owned TV, channel which broadcast news at one time of the day, to a much wider choice of providers which broadcast news 24/7.

Previously, we only used to watch news at 9pm on PTV as that was the only local medium, but now we have different options and we can watch news anytime. (Pakistan, female, SEC CD, 35+ yrs)

4.2 Trust across the five markets

Trust seemed to be conceptualised differently in the five markets, but it is difficult to judge the extent to which these differences are based on translation issues or on different cultural understandings of the concept. Silverstone has suggested that 'trust is a way of managing, that is reducing, distance' (2006: 123). It could thus be argued that the notion of trust in daily life varies depending on the closeness or distance we encounter in relation to *the other*: we may trust our partners, family and friends because they are familiar to us and we know them intimately; they belong to our inner circle of trust. Or we may trust a religious or political leader who we do not know personally, but whose authority provides us with guidance in our daily lives and invokes our respect; these leaders or institutions belong to our outer circles of trust. The decisive point here is the relationship to *the other*. In today's globalised world, the media are crucial factors in establishing this relationship. The media represent the other, they portray our outer world. By trusting, we establish a connection between this outer world and our own world. We connect the dots and enter into a relationship with the other, no matter how close and familiar or how removed and distant the other is. However, this implies that the way in which the other is portrayed is perceived as truthful. As Silverstone has argued, 'for trust to be relevant there must be a possibility for others to betray us' (1999: 118). This becomes particularly important in media environments in which a lack of transparency, corruption and a restricted freedom of expression traditionally have made it difficult for citizens to truthfully connect the dots between their outer worlds and their own worlds by consumption of media. This study therefore looked at different relationships, different circles of trust, starting with family and friends, neighbourhoods, work colleagues, to different types of media, non-

governmental institutions, as well as religious leaders and politicians, in order to get a better understanding of how participants in the focus groups relate to and make sense of their outer world, how they connect the dots.

From the responses of the focus group participants in *Kenya*, it was apparent that trust was perceived as an essential factor of everyday life, equivalent to reliability, dependability, integrity, keeping secrets, frankness and righteousness.

To me I would say that if I have to trust you then you should be my friend, someone I can confide in and someone whom I know that my secrets are safe with. (Kenya, participant SEC BC1, 18–34 yrs)

Most Kenyan participants reported that they would trust family, friends and God most in everyday life, while they deeply distrust politicians and government officials, who are considered corrupt.

Similarly, in *Egypt* 'trust' generally seemed to be linked to honesty, security and credibility. Egyptian participants put trust more often in contexts of relationships than participants in focus groups in other countries, associating trust with democracy and faith structures, as well as family bonds. God, family, friends and religious leaders were named as the most trusted sources in Egypt, while politicians and foreigners were amongst the least trusted. Regarding different media platforms, participants in the focus groups emphasised that they do not trust a medium alone, but rather a specific channel or station which they find credible.

On TV we can see international and local news and if I am watching TV, I will know what happens in the world ... but trust depends on what channel or programme you are talking about. (Egypt, male, SEC ABC1, 18–34 yrs)

Meanwhile in *Senegal*, trust was generally associated with reliability, objectivity, independence and truthfulness. Across the focus groups, high trust levels were linked to family and friends, religious leaders and television. Interestingly, although the respondents felt that the credibility of information coming from family and friends may not be equal to the credibility of information from TV, participants seemed to base their trust on the affinity to their source, i.e. the family and friends, and their positive intentions:

We easily believe in our parents, they are viewed as a reference. (Senegal, female, SEC ABC1, 35+ yrs)

Besides news, the family can inform us on many things. Sometimes it is the elder ones who inform the younger ones on what they don't know. (Senegal, female, SEC ABC1, 18–34 yrs)

If our friend would not share information that would hurt us. A friend merits our trust. (Senegal, male, SEC ABC1, 18–34 yrs)

In Senegal, a predominantly Muslim country, religious leaders are viewed as opinion leaders and exercise a great deal of influence on citizens. Trust in religious leaders is based on the special status they enjoy. Information conveyed by religious leaders was considered by many participants as nearly sacred.

Religious leaders are the first to be believed if we refer to our culture and tradition, they are our guides. You don't object to [a religious leader's] sayings, they are an authority and before they talk, the subject must be very serious. (Senegal, female, SEC ABC1, 35+ yrs)

Yet some of the focus group participants seemed to view the high status of religious leaders with a degree of suspicion and scepticism.

As far as they base what they are saying on religion, we have confidence in them but when they do not refer to religion while speaking we know that they are not at the level of their authority. (Senegal, male, SEC ABC1, 35+ yrs)

Across the media platforms, TV was the most trusted source, for participants felt that hearing and seeing information would result in higher credibility than just hearing a piece of news.

TV broadcast the story coupled with the image. So before they show a news item there must be an image for people to believe. (Senegal, female, SEC ABC1, 35+ yrs)

In the first position, we placed TV because it joins images to words. Image makes the information more credible. (Senegal, participant, SEC C2D, 35+ yrs)

For the few Senegalese participants who indicated that they would access news on the internet on a regular basis, internet was the second most trusted source. However, the majority of the participants ranked radio as the second most trusted source for news, followed by the print media. Mobile phones were not considered trustworthy sources for information. Some of the participants explained that this was because it was easy to send anonymous messages to a person's mobile phone, which could not be verified.

In *India* meanwhile, trust (*vishvasniya*) was defined as one's belief and faith in another – the confidence that one would not be cheated or lied to. Similar to the other four markets, close family were perceived as the most trustworthy source, while politicians were considered the least trustworthy.

We put these at last: religious leaders and national politicians and international organisations, because they are all diplomats. They will give half of the information. (India, male, SEC B2C, 18–34 yrs)

Across the media platforms, TV emerged as the most trustworthy source, because of its audio-visual nature. Newspapers consistently followed TV as a source that could be trusted, because of greater faith in the written word. The internet, mobile phone and radio were sometimes clustered together by the participants and often fell close to each other on the trust scale. Of the three, the internet was considered the most trustworthy and was seen as a source that provides a great deal of information (was better informed). Interestingly, in India, unlike other markets such as Egypt and Senegal, religious leaders ranked amongst the least trustworthy sources for information, together with politicians. A few of the arguments made during the focus groups in Mumbai are summarised in Table 4.1.

Platform	Reason for trust	Reason for lack of trust
TV	<ul style="list-style-type: none"> • Can 'see' with our own eyes – visuals can't be faked; the proof of pictures • Live – immediate information • Linked with organisations like Reuters and Press Trust of India 	<ul style="list-style-type: none"> • The 'masala' on channels • So many channels – some carrying contrasting information on same event
Family	<ul style="list-style-type: none"> • Love and care for us; want the best for us • Will never betray us • Our own blood – trust them most • With us 24/7 • For personal information 	<ul style="list-style-type: none"> • Not direct source – will have got their information from somewhere else • More emotional – '<i>we trust our family, but not for information</i>' – men • Sometimes withhold information out of concern for you • Not very informed source – may think they are giving you right information – but it may not be so. I will check from authentic place like TV or radio; they know as much as we do;
Newspapers	<ul style="list-style-type: none"> • Get detailed information • Take care what they print – because the written word can be challenged 	<ul style="list-style-type: none"> • Don't spend much time with them

Internet	<ul style="list-style-type: none"> • Check it personally • Use as source for information on many things • Get lot/detailed information • Modern/latest technology 	<ul style="list-style-type: none"> • Don't use it much
Mobile	<ul style="list-style-type: none"> • Remains with us all the time • Easily accessible • Doesn't exaggerate 	<ul style="list-style-type: none"> • Not well informed – unless one gets regular updates • More for youth related information
Radio	<ul style="list-style-type: none"> • Easily accessible – on mobile too. • We trust the radio 	<ul style="list-style-type: none"> • Hardly access it for information • More for entertainment
Friends	<ul style="list-style-type: none"> • Good friends never lie • With us through thick and thin • Extension of family 	<ul style="list-style-type: none"> • Can participate in spreading rumours
Colleagues	<ul style="list-style-type: none"> • Source of info at office • Well informed 	<ul style="list-style-type: none"> • Could compete with us – can misguide • A work-related relationship – nothing more
International organisation	<ul style="list-style-type: none"> • Provide accurate information • Accepted across the world 	<ul style="list-style-type: none"> • Hesitant towards them • Unknown entity – don't know much about them • Foreign – can't rely on them
Neighbourhood	<ul style="list-style-type: none"> • May have local/relevant information • Take care of our house when we are not there • Help us in times on need 	<ul style="list-style-type: none"> • Can't always trust neighbours • Neighbours can lie • Can spread more rumours and gossip
Religious leaders	<ul style="list-style-type: none"> • Can give knowledge about things that are beneficial to us 	<ul style="list-style-type: none"> • Cause friction on basis of religion • Have very narrow view – 'see the world from limited angle'
Politicians		<ul style="list-style-type: none"> • Selfish – they work for their own good

Table 4.1 Arguments for and against trust in different platforms in Mumbai, India

Finally, in *Pakistan*, the concept of 'trust' was associated with family and friends, faith, sincerity, loyalty and honesty.

Trust develops if you expect something from somebody and that person fulfils your expectations. (Pakistan, male, SEC CD, 18–34 yrs)
Being a Muslim, I trust Allah, friends and family, my mother. (Pakistan, male, SEC CD, 18–34 yrs)

TV was seen to be the most accessed and the most trusted source of news and information among the media, as it was perceived as being easily accessible, up-to-date and live. Trust in other media varied across groups. Some people trusted the internet most after TV, and some preferred the radio or mobile phones most after the TV.

Those who trusted the internet most after TV preferred to get information from a variety of sources on a particular story. Participants who

trusted mobile phones most after TV were those participants who trust word of mouth. They explained that via SMS and phone calls from relatives they get instant news about events, such as bomb-blasts in Lahore and surroundings:

When any incident happens, the surrounding people get informed first ... they are the providers of news to news channels and to their relatives through mobiles. So we can say that it is not necessary for news always to come from news channels, rather it can come from our mobile phones from relatives and friends. (Pakistan, male, SEC AB, 18–34 yrs)

Whenever an undesirable incident happens, your family members, relatives and friends call or text you to alert you of the affected area or to inform you about the accidents. (Pakistan, male, SEC AB, 18–34 yrs)

Newspapers are a trusted source of information but due to the presence of television and internet, less people are now reading papers. Most participants stated that they would listen to the radio only as a source of information if there was no access to television (typically situations when one is traveling and cannot view television or when there is no electricity).

4.3 Trust in international and domestic media

KENYA: Findings from the focus groups in Nairobi suggest that the participants generally trust news from international providers because of their high journalistic standards and their in-depth analysis.

Most of them [referring to international providers] deal with facts e.g. the issue with the budget, I first read in the newspaper that a certain figure was missing but later on I found out that more than that was missing meaning they [local providers] didn't dig deeper. (Kenya, participant SEC BC1, 18–34 yrs)

The findings from the focus groups suggest that there are moments when people turn to international providers as sources of information. Such moments, according to the respondents, are in times of national tension, when citizens feel that the local media are hiding information or are prohibited from sharing certain information:

When the president is sick. (Kenya, participant SEC BC1, 18–34 yrs)

Besides sensitive moments affecting the country, participants further stated that they would also turn to international providers for breaking news in other countries during times of international crises and calamities, and for

insight and analysis that in their view are not adequately covered by the local providers. Examples given by the focus group participants of news stories that they felt did not contain enough details and adequate coverage and prompted them to switch to international channels were the following:

During the post election violence national channels weren't giving full information but turning to international ones they were giving full details. (Kenya, participant SEC C2D, 35+)

Then there is this story of Obama, Al-Jazeera was giving it from the time he was born, when he went for his education in an Ancient country, how the mother divorced ... they elaborated better than the local channels ... They were showing live pictures of Obama when he was a young man, his thatched house. (Kenya, participant SEC C2D, 35+)

I turn to VOA and CNN when I want information on Africa. (Kenya, participant SEC BC1, 18–34 yrs)

Like during the elections here most of the news we were getting were not Kenyan because everybody was fearing for their life and whatever we were seeing on the TV most of it was not Kenyan because the journalists would go there but when they would hear the grenade blow, they would go away. (Kenya, participant SEC BC1, 18–34 yrs)

International providers were perceived as risk takers, or channels that go that extra mile to get the news for their audience:

They are risk takers, not like here in Kenya. You can see situations in Iraq where journalist are tortured because of the risk and they can give their real life experience. (Kenya, participant SEC BC1, 18–34 yrs)

They have quantity news in a quality way. (Kenya, participant SEC BC1, 18–34 yrs)

They touch all areas of life, like wildlife, business news, politics, industry, trade, weather, tragedy. (Kenya, participant SEC BC1, 18–34 yrs)

However, some participants suggested that the consumption of relayed news from international providers might be affected by the choice of their local partner stations. Respondents indicated that they would prefer to access news

from international providers directly, rather than through a local channel. According to these participants, a negative perception of local partner stations would affect the programmes of international channels. This may be one explanation why Al-Jazeera was more popular amongst the focus group participants than CNN or BBC, as it is broadcast during daytime on its own terrestrial channel in Nairobi, while other international channels are broadcast on their partner stations (KTN in the case of CNN) only at specific times during the day, and during the night.

I was asking if there is a way you can access this news (from international providers) independently without relying on local channels. (Kenya, participant SEC BC1, 18–34 yrs)

I think they can expand like Al-Jazeera. You can watch it full time so they should do the same for the rest like CNN. At times they cut it in the middle of news then they don't bring it on weekends. (Kenya, participant SEC BC1, 18–34 yrs)

Other international channels, such as France 24, were not very well known, partly, as one participant explained, as people are unable to watch the channel.

... the reception is very poor [referring to France 24¹³] (Kenya, participant SEC C2D, 35+)

The age of a news provider also seemed to affect the levels of trust in providers. Providers like BBC and Al-Jazeera, which have been in existence in the Kenyan media market for a long time, were perceived as established and therefore trustworthy providers, although some respondents suggested this would make them boring.

Because they have been there for long and they also give reliable information. (Kenya, participant SEC C2D, 35+)

Participants also raised concerns over negative stories by international providers about news in Africa, which they felt diminished their trust. Additional concerns were raised on the emotionally detached way in which some presenters presented local tragic news:

¹³ At the time of our focus groups in Nairobi, France 24 was relayed a few hours per week via the state-owned channel KBC.

Some presenters read the news without any feelings, like the tanker explosion of Sachangwan – the presenter was laughing after reading the news. (Kenya, participant SEC BC1, 18–34 yrs)

EGYPT: International and pan-Arab media were perceived by focus group participants as less biased and not influenced by the Egyptian government, and were therefore more trusted and perceived as more reliable than the state-run provider. The use of the opinions of international panels and experts who are at the disposal of international media also seemed to enhance the credibility of these news providers.

International news is more credible because they don't polish the news but say them as they are. (Egypt, female, SEC C2D, 35+ yrs)

Media control and censorship exercised by the Egyptian government emerged not only as a well-known but also as an accepted fact in the focus groups. The lack of transparency in information being released through the local media seemed to foster mistrust, for the information was perceived to have been censored and was therefore believed to be government propaganda:

If it is a case of an important public person, then it will not be covered in full ... and sometimes they cut the news broadcasts abruptly. (Egypt, female, SEC C2D, 35+ yrs)

Egyptian channels will only broadcast what they believe is allowed to be announced ... like when the Prime Minister was late for the water conference, they said that the conference took place without informing us. (Egypt, male, SEC C2D, 18–34 yrs)

Local and national news stories seemed to matter most to the respondents in the focus groups. Based on this focus, international media were perceived as broadcasting local news with an international lens, and thus were perceived to be biased and unreliable. Respondents suggested that not only was there less coverage of local topics than in local media, but the broadcasts of international providers were also lacking in detail. A feeling seemed to prevail amongst the focus group participants that the local perspective is not represented correctly, with some respondents implying that international media are biased against Egypt, especially while reporting on politics, sporting events, etc.

They are trying to spoil Egypt's image by not checking if a story is true before broadcasting it. They focus on Egypt's disadvantages only like there is nothing good here at all. (Egypt, male, SEC ABC1, 35+ yrs)

Local media were generally preferred by the participants across the different socio-economic strata, as they provide in-depth local coverage and understand the cultural context and local sensitivities. Although international news gets less emphasis in the local media, participants stated that they were satisfied with the local news coverage.

Most importantly I care for my country's news, and don't give the same amount of attention to other countries' news. (Egypt, female, SEC C2D, 18–34 yrs)

International and pan-Arab media were generally perceived to be more modern, progressive and professional in their programming, format and journalistic standards, particularly amongst participants from higher socio-economic classes.

The way they do everything attracts me like the way they will announce that there will be a specific programme at a specific time and the professional way which they will announce the news ... all this attracts me. (Egypt, female, SEC ABC1, 35+ yrs)

They have many reporters around the world so they cover the news second by second ... so they have the most recent updates and broadcast them 24 hours a day. (Egypt, male, SEC ABC1, 35+ yrs)

By comparison, participants felt that Egyptian local and domestic media could not measure up to this professional standard. Or, as one participant put it:

Egyptian reporters are already in Egypt and most of them are lazy and don't rush to cover the news ... they wait for government directions. (Egypt, male, SEC ABC1, 35+ yrs)

Consequently, the following factors emerged as enhancing the respondents' trust in local channels: where the language and the tone of voice in the broadcasts reflect local sentiments; critical broadcasts that contain constructive criticism on governance; broadcasts and programmes of experts discussing local issues and providing anecdotes behind the news; broadcasts addressing local news and issues; and broadcasts that provide ground-level context for local issues. Meanwhile, on the other side, respondents perceived a lack of transparency particularly on government issues as well as incomplete reports and the failure to follow up on locally relevant news as factors that undermined their trust in local news providers.

Regarding pan-Arab and international channels, respondents suggested the following factors that enhanced their trust in these providers:

an honest perspective on local news; balanced coverage of Egypt and the Arab world (stressing the positives along with the negatives); a panel of experts discussing issues in depth; instant coverage of news; the variety and depth in news; the professional presentation of news and attractive packaging; and the coverage of locally big stories. As undermining trust in international and pan-Arab providers the following were highlighted: the language (standard Arabic as opposed to Egyptian dialect) and a tone of voice that does not reflect local culture and sentiments, as well as applying Western standards to domestic and Arab issues.

SENEGAL: The responses of focus group participants in Senegal (Dakar) suggest that state-owned media are the least trusted news media. Many respondents, regardless of their socio-economic backgrounds, described the government-owned media, as opposed to private domestic media, as a mouthpiece of the government:

... there is a question of independence with the local media. The State has an influence in their production. (Senegal, participant SEC C2D, 35+ yrs)

Foreign media are more autonomous whereas the local media work under the pressure of the State as everybody knows. (Senegal, participant SEC C2D, 35+ yrs)

Before I was concentrated on RTS1. But later I realised that if you really want to know what is happening in Senegal, you'd better watch Walf and 2STV perhaps. Walf is not politicised as a participant said earlier on. They show everything. Then for international news, I listen to RFI. At my place I don't have international providers because I am not subscribed but when I go to my brother's place I watch them. (Senegal, female SEC ABC1, 35+ yrs)

These findings correspond to quantitative findings made in the project's previous report on consumption (Table 4.2), which suggested that people in Senegal would first turn to Senegalese private TV if an event occurred in Senegal, the African region or in the world.

	Media first turned to when a news event occurs ...		
	in Senegal (%)	in Africa (%)	in the world (%)
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 4.2 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).

Despite these unflattering views, RTS, the government-owned provider, is widely watched when it comes to important social and/or sports events, for it is granted exclusive rights to air these events. Hence people no other choice but to tune in to the channel.

Local private media outlets, especially Walfadjiri, enjoyed great sympathy amongst the respondents. The private TV/radio channel was praised by participants for its persistence and dedication to broadcast independent news despite threats and vandalism against their premises.

International media were perceived to be trustworthy but, with the exception of RFI and TV5, were mainly watched by people from higher socio-economic backgrounds.

RFI traditionally has been popular and much trusted in Senegal, but according to some of the respondents in the focus groups, the provider lost some of this trust during the recent crises in Côte d'Ivoire and in Guinea Conakry. One respondent suggested that it was as a result of a report from RFI that led people in Guinea to riot in the streets. RFI was also accused of supporting opposition to the incumbent president during those chaotic times:

It was RFI which pushed the opposition parties to manifest against Daddis, the media gave power to the opposition to win Daddis. They influence internal politics in some countries. There are some realities that should not be revealed. There are some things which should be kept aside discreetly but that's not their case, they say everything. And this can cause troubles. So, RFI didn't play a positive role in Guinea. (Senegal, male, SEC ABC1, 18–34 yrs)

I am a bit suspicious of foreign media. You know, I was living in Côte d'Ivoire and I know how the war started. And the role some foreign media played. They can manipulate information and create instability in a country. (Senegal, male, SEC ABC1, 35+ yrs)

Meanwhile, the French-based channel TV5 enjoyed high levels of trust amongst the focus group participants, who perceived it as the international provider closest to Africa, and more Africa-friendly in its broadcasting than other international channels. According to the respondents, TV5 Afrique tends to highlight the positive aspects of Africa, especially the diverse cultures and the eclectic and colourful beauty of the continent. TV5 Afrique was seen as one of the oldest and most established international providers in Senegal, and many of the focus group participants stated that they would watch it as a subscription is not needed to access it (a special, low-cost antenna suffices to pick up TV5 Afrique). France 24 gradually seems to be gaining ground. Although not as many people were watching France 24 as were watching TV5 Afrique, France 24 was perceived as innovative and trustworthy. Its fast and succinct newscasting gives viewers the chance to get the news in a short time.

INDIA: International media such as BBC and CNN are highly trusted in India, but mainly consumed by an elite – people from higher socio-economic and educational backgrounds. International channels are respected for their professionalism – the thoroughness of research, the conciseness of the reporting, their access and reach with regard to news stories across the globe. They are seen as well-reputed and as being experts in the business of providing news. They are trusted for these reasons – for their expertise and professionalism. Yet, they are perceived as less familiar and more distant than the local channels. The BBC (via the BBC World Service) has been an icon of news reporting over the radio for several generations of Indians. But as a TV news channel in our focus groups the BBC was perceived as not being in touch with modern India. This is brought into relief that in contemporary India (versus the India of 20 years ago), when it comes to regular, day-to-day Indian news, the local Hindi and English channels were felt to provide more than adequate coverage. Moreover, the style of vernacular seems to appeal to

the majority of viewers and most consumers would acknowledge that the technological quality of the presentation is fast catching up with international news channels. It is therefore only when a serious and/or sensitive event occurs in the country that people feel the need for 'more' information and for a different perspective which they get from international providers.

When it comes to international news, the international channels are relied on for more detailed and accurate information.

It depends on the kind of news. For numbers we will trust BBC, but for other news we will trust Star News and Aaj Tak – they are both pretty quick. For international news yes, we can trust BBC. (India, female, SEC B2C, 35+ yrs)

Across all focus groups, respondents suggested that they would turn to international news providers in times of national and international crises and calamities, as international providers were generally perceived as having a better infrastructure and reach, which would result in better and more detailed coverage of the event:

International channels show you in depth. Indian channels show Indian news in depth – but not other news. (India, female, SEC A1A2B1, 35+ yrs)

Indian channels were covering the Tsunami – but not as well as these (international) channels. We get more information from these channels. Their satellite is bigger and better. (India, female, SEC A1A2B1, 35+ yrs)

They reach the spot on time – they have reporters there already. (India, male, SEC B2C, 35+ yrs)

We need them for international news. (India, male, SEC B2C, 18–34 yrs)

When the World Trade Centre towers were falling – their cameras were already there. We could see live – when the second tower was falling. No Indian channel would have got that. You get excellent coverage of international news. (India, male, SEC B2C, 18–34 yrs)

Similarly, for certain national events, such as the Mumbai attacks, international channels were perceived as providing more accurate and

objective information, while Indian channels had to give in to government pressure.

They cover everything – like in Mumbai too – if you do not get accurate information about what is happening from Indian channels – that’s what BBC is for. They literally fight to get proper information. (India, male, SEC B2C, 18–34 yrs)

When it is very heavy (vital/significant), very important news then we need an international channel. If it is very normal, everyday day news – which you hear today and forget tomorrow – we can opt for national news channels. (India, male, SEC B2C, 18–34 yrs)

I still want to be connected to world news. (India, female, SEC B2C, 18–34 yrs)

On being asked whether there were certain news providers that they trusted more than others, most respondents asserted that all channels were more or less equally trustworthy to them, no matter whether they were local or international providers.

Respondents across all focus groups indicated that they like and trust local channels, as there is a level of comfort and familiarity with the language and reporting style. Interestingly, the dramatisation (if not carried too far) was perceived to make for a more entertaining and interesting viewing experience and was not perceived to erode trust. Channels like Aaj Tak and Star News emerged as very trusted channels because of the speed of their reporting and the extensive coverage of Indian news. Several respondents stated they liked these channels because they were ‘like us’.

PAKISTAN: The most trusted providers of news across the focus groups in Pakistan were Geo, Express, Dunya, BBC and CNN. The state-owned PTV was the least trusted channel and was perceived at the mouthpiece of the government by most of the focus group participants. Geo, which is considered the pioneer of independent news stations and has been reporting about the ineffectiveness of different regimes ever since it has been on air, emerged as the most popular and most trusted TV channel in the focus groups. Respondents praised the channel’s independence and resistance to government pressure, as well as its breaking news.

Geo broadcasts breaking news before all the other channels. (Pakistan, female, SEC AB1, 35+ yrs)

I trust Geo most because it was the first channel to provide wide coverage. It was the first channel that challenged PTV. (Pakistan, female, SEC AB1, 35+ yrs)

Express is a relatively new channel which is aired in both English and Urdu. Express was perceived nearly unanimously across all focus groups to be the next best option after Geo, as it provides accurate and breaking news. In some groups participants stated that it might even be faster than Geo in breaking news as it is technologically better equipped than the leading Geo.

Meanwhile, the responses of the participants in the focus groups suggest that Dunya is fast gaining popularity among the audiences, especially due to its very popular political satire show *Hasb-e-Haal* with its main character Azizi (played by Sohail Ahmed) which talks about current affairs and controversial topics in a comical way.

In terms of international providers, BBC and CNN emerged as the most popular and most trusted international channels.

The BBC gives true and factual news. They don't hide any news, whereas our local channels hide some important information from us. The BBC discloses everything. (Pakistan, female, SEC AB1, 35+)

The respondents preferred the BBC to CNN, as it is older and better known. Some of the participants also reported that they find the English spoken on BBC easier to understand, compared to the American English spoken on CNN. The participants in the focus groups generally seemed to trust international providers, although some of them stated that international media were generally biased against Muslim countries and against Pakistan in particular, linking it to terrorism.

While participants stated that they would trust CNN they did not mention watching it much these days. Before the liberalisation of the media environment in Pakistan, at a time when there was limited and highly restricted access to broadcast media, one local channel aired CNN during daytime, making it the only available alternative to the state-governed PTV channel during the day. Based on this, most of the respondents were aware of CNN, but due to the increased competition and the liberalisation of the media environment, not many participants were still watching the channel.

4.4 Summary

Increased choice of news providers in all of the five markets seems to have led to increased trust in local and domestic media. The findings presented in this chapter suggest that across the five markets, participants in our focus groups

trusted national and local as well as international and pan-Arab media. State-owned broadcasters were generally not trusted and were perceived as mouthpieces of the respective governments across the five markets. However, the findings further suggest that, for a majority of the focus group participants, the high levels of trust do not translate into high levels of consumption when it comes to international providers, unless there is a national or international crisis. Although participants in all of the five markets expressed great respect and appreciation for the technological and journalistic professionalism of international providers, they felt that their predominantly local and national news needs were sufficiently covered by domestic and regional broadcasters, which are highly interactive with their audiences. High levels of trust in private national and private local channels seemed to translate into increased consumption of these providers. The exception across all of the five markets was opinion leaders, who also trusted international providers but consumed international media much more frequently and on a more regular basis than their fellow citizens. Word of mouth and TV were the most trusted 'media' across the five markets for people felt they could trust the source in the case of word of mouth (family or friends mostly) or they could verify the information themselves in the case of TV (through the combination of visual and spoken information). The next chapter analyses these findings and draws conclusions with regard to trust in international broadcasters.

5 Conclusion

At the outset of this study, trust in the media, based on sociological and political literature, was roughly conceptualised as *the product of the perceived fulfilment of a promise and expectations over time*, in the hope that participants in our focus groups would construct a less technical, more applicable definition of trust in media in the context of everyday life. Throughout this report, it has been established that the consumption of news from specific broadcasters is tightly interlinked with trust – trust in the broadcast, as well as the broadcasting institution and the delivery platform.

The findings of our research suggest that consumers of news in the five markets identify 'trust' as the engagement with a certain set of values: cultural and moral values that are reflected in broadcasts of specific providers. It is the engagement with these values, it seems, that determines the average consumer's consumption of news, much more so than factors such as credibility, objectivity or impartiality. This became particularly evident in our fieldwork in India (i.e. the most competitive of the five markets). It seems that the values reflected in broadcasts are measured by consumers against the cultural, political, historic and religious background in each country, as well as the values embedded in the provider of news.

While a decade or two ago this aspect of trust may not have mattered, and factors such as credibility, impartiality and objectivity may have been the decisive attributes for providers to induce trust, it does matter to consumers now. In an increasingly complex world it is not only the number of providers of news and the amount of information available that have multiplied, but also the number of standpoints from which it is possible to challenge any broadcast, any provider and any technology. To navigate one's way through this information jungle can be an excessive demand for consumers, invoking a need for guidance and reliability (which, paradoxically, is often found by sticking to the familiar). Previous studies have shown that consumers tend to choose and trust providers of news whose ideology and values are congruent with their own worldview (Oyedeki, 2010). Once a match between the consumers' worldview and the worldview portrayed by the news provider becomes established, consumers transfer their trust for the provider to the provider's message. Naturally, the more they consume news from the provider, the more their own worldview is reinforced. In other words, most people who regularly watch Al-Jazeera, in particular Al-Jazeera Arabic, will trust its news without questioning, until, as we have seen in the case of Egypt 2010, a broadcast occurs which contradicts their worldview and hence disrupts the trust feedback to the provider. In essence, it could be argued, what brands like Al-Jazeera do is to make judgements on behalf of the audience on how and in which frame to understand and interpret broader

events and issues. That is, they provide an opinion on events. This may be very useful, particularly for events with which we are not familiar or of which we have no prior knowledge – an increasing occurrence in a world in which the amount of information available is quadrupling every second. This poses a problem for those brands of providers, including a number of established international news providers, who deliberately do *not* want to make such judgements on behalf of their audiences, but instead provide consumers with the breadth of opinions available on a certain issue. Editorial values such as impartiality delegate the responsibility of making judgements to the audience. The responses from participants in our focus groups across the five markets seem to suggest that this responsibility is perceived as too burdensome for many average consumers overwhelmed by the information overload in today's world. On the other hand, it is a responsibility that appeals to people who like to make their own opinions, *opinion leaders*. While mainstream audiences may find the balanced information of such impartial providers credible and useful, they do not feed their trust in the message back to the provider, for there is a gulf between their own worldview and the absence of a worldview expressed by the avowedly impartial provider.

Perhaps unsurprisingly, the story told in this report then paints a picture of two different types of consumers in five emerging economies: a highly educated consumer from a high socio-economic class and national elite who is part of a national minority of opinion leaders, who would like to be part of a global elite and who avidly consumes and heavily relies on independent, impartial international broadcasters; and a less privileged, often less educated consumer, mainly interested in updates on local and national events, who perceives international broadcasters as uninvolved and distant and who prefers to consume news from private domestic providers or pan-Arab/pan-African networks. While the first consumer is in search of primarily objective information and in-depth analysis of national events, as well as current international and business affairs, the other consumer looks for localised information on events that might affect him/her in his/her everyday life.

5.1 Developments

Despite the historic, political and cultural diversity and uniqueness of each of the five markets, which shape consumers' news needs, as well as their expectations towards providers of news, several overarching trends across the five markets could be identified.

- *Trust in word of mouth.* In everyday life, people rely on word of mouth and family for information and 'news' that they trust. They then follow this information up via the media. Where people have access to

social networking sites, they trust the information of friends. In predominantly Muslim countries such as Senegal and Egypt, religious leaders are also strongly trusted sources for information.

- *Trust in private domestic broadcasters vs state-owned broadcasters.* Private channels and private radio stations in the five markets are generally more trusted than state broadcasters, which are normally seen as ‘mouthpieces’ of the government and viewed with some suspicion. Pan-African networks were more trusted than international providers in Kenya by the majority of the focus group participants. This was also partly the case in Senegal, although there RFI, as an international broadcaster, is highly trusted by elite and mainstream consumers alike. Similarly, in Egypt, pan-Arab broadcasters are generally more trusted than international broadcasters by all consumers. In India, which is the freest of all markets and has a high degree of local and domestic provision, international providers are perceived as trustworthy, but are mainly watched by an elite.
- In terms of *different media platforms*, consumers seemed to trust information on ‘traditional’ media such as TV and radio more than they trust the internet across the five countries.
- *Trust as an individual cultural expression:* the previous chapters have suggested that in politically more unstable nations, and in times of crisis, people tend to watch news from international broadcasters. We found that consumers of each market had a different approach and understanding of trust in information sources and news, depending on each country’s political structure, economic stability, media environment, religious environment and culture. Trust in international media therefore cannot be defined outside these boundaries, but must be understood as a product of specific cultural and political parameters, linked to individual information needs that are unique to each country.
- *The paradox of increased choice and consumer satisfaction:* as Schwartz (2004) has argued, adding options to people’s lives increases the expectations people have about how good those options will be. This leads to less satisfaction with the results of increased choice even if they are good results. According to Schwartz, the reason that everything was better back when everything was worse is that when everything was worse and choices were more limited it was actually easier for people to have experiences that were a pleasant surprise.
- *Media consumers are media literate.* Consumers in all five markets turned out to be media literate, even people from lower socio-economic

classes who were not necessarily educated. Consumers in markets with a restricted freedom of press know which channels are supported by whom, and generally chose the channels/providers that they watch regularly accordingly. Although people seem to know well which private domestic broadcasters are supporters of (and sometimes receivers of illicit funds from) specific political parties, this does not seem to deter them from watching or listening to these broadcasters.

5.2 Outlook

The findings of this research suggest several strategies to respond to these developments, to re-engage with local values and to invigorate trust. These strategies have three starting points: the market, providers and consumers.

POSITIONING OF BROADCASTERS IN THE MARKET: The liberalisation of the media environments, strengthening local and national competitors in the five markets, have left international broadcasters with the difficult strategic decision of how to position themselves in an ever-more globalised and polarised media market. In this competitive context, international providers need to identify where, compared to their local, domestic and pan-Arab/pan-African competitors, their own comparative advantage lies: in catering to a minority global elite or in reaching out to a local mainstream mass audience.

We are currently witnessing the rise of a global elite: cosmopolitans who do not consume the same information about the world as their fellow citizens do. For these cosmopolitans, international providers are particularly valuable, as they offer an objective, balanced in-depth analysis of current events that apply to everyone, no matter in which country they live. However, the transformation of population-rich developing countries into the fastest growing economies in the world has not only led to the rise of a new, global elite, but also to the rise of population-rich middle classes with an increasing purchasing power, and an increasing appetite for Western luxury goods. For example, sales of luxury Mercedes cars to China tripled in the year to July 2010, while sales to India doubled.¹⁴ Simultaneously, new media and particularly the unprecedented growth of internet-capable mobile phone devices in these five markets, which have not spread in a traditional 'linear' fashion from the rich to the poor or from urban to rural like other media, but have seen exponential growth across the whole population, have increased global connectivity across the whole population and are likely to open up access to a new mass audience. In an increasingly competitive market, as Ricardo (1911/2004) famously argued in relation to political economy and

¹⁴ *The Economist* (13 Aug. 2010), www.economist.com/blogs/freexchange/2010/08/europes_economies, accessed Dec. 2010.

trade, identifying one's comparative advantage is crucial. It means determining and focussing on what one does best, in each market and in each cultural context. In the fast-changing, multi-layered media landscape, this means adapting this comparative advantage to new media platforms, as well as forming partnerships to further enhance the comparative advantage. As noted here, this can involve difficult trade-offs for international broadcasters between their global TV services (which can only be tailored to a very limited degree to different markets) and their far more localised vernacular services. For resource-constrained broadcasters there are obvious incentives to focus on the prestige and economies of scale delivered by the global TV services, but they also need to recognise that in limiting themselves to an audience of opinion formers they are cutting themselves off from a less affluent and influential but far larger audience.

ASSESSING EDITORIAL VALUES: The findings of this study suggest that the differences between a mainstream and an elite strategic position also seems to be linked to the tone of the broadcast, which is essentially a reflection of editorial commitments. The challenge for international providers intending to reach a localised mainstream audience seems to lie in how they can successfully engage with local vernacular traditions and combine them with their own institutional values to bridge the cultural distance between editorial commitments and local cultural values in their broadcasts. Therefore, depending on the strategic position adopted, i.e. elite or mainstream media providers, the position taken may require a reflection on editorial guidelines and a debate about emotionally engaging versus intellectual and objective broadcasting.

OFFERING A PLATFORM FOR CONSUMERS: One way to bridge this distance and to create proximity could be to increase efforts to engage with local audiences, for example by providing platforms to consumers so that they are able to contribute their opinions and express their concerns. This is nothing new, but there seems to be a striking difference in levels of interactivity between local domestic (private) providers and international providers. Local providers routinely consult with and engage with consumers on the ground, and they seem to offer consumers the chance to phone in whenever something is happening. While this may be difficult for international providers, who are not necessarily based in remote African or South Asian provinces but instead have offices in, say Paris and London, mobile phone platforms and partnerships with local providers may offer them an opportunity to engage with local audiences. And it may provide a good opportunity for consumers in these five markets, where freedom of speech still is, and traditionally has been, restricted. Being able to contribute to something gives people a feeling of ownership, and of having a stake in

something; in other words, it creates a feeling of proximity, rather than distance.

Given these findings, in a competitive and globalised everyday life and ever more liberalised media contexts, it seems that for trust to convert to mass rather than elite use, it needs to be based on proximity and the representation of local values and identities, more than traditional values of objectivity and impartiality.

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Appendix A. Detailed fieldwork schedule

Country	Date	Method	Sample	Location	Conducted by
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	Aug. 2010	8 focus groups, 2 immersion interviews	Urban individuals 18+, ABCD SEC	Mumbai	SHAMAN Market research
Pakistan	Sept. 2010	8 focus groups	Urban individuals 18+, ABCD SEC	Lahore	TNS Dubai

Appendix B. Screening questionnaire, example for fieldwork in Kenya

Respondent Name: _____

Quota sheet focus group discussions

Groups	Location	Age/lifestage	Gender	Socio-economic class	International news
1	Nairobi	18–34	50% men 50% women	Low (C2D)	At least half of the group should access international providers at least once a week
2	Nairobi	18–34	50% men 50% women	Middle (BC1)	Access international providers at least once a week
3	Nairobi	18–34	50% men 50% women	Upper (AB)	Access international providers at least once a week
4	Nairobi	35+	50% men 50% women	Low (C2D)	At least half of the group should access international providers at least once a week
5	Nairobi	35+	50% men 50% women	Middle (BC1)	Access international providers at least once a week
6	Nairobi	35+	50% men 50% women	Upper (AB)	Access international providers at least once a week

Other criteria:

- 6–8 respondents per group
- mix of male and female as much as possible
- awareness and ideally access of international providers of news for participants from low socio-economic backgrounds (at least half of the group should access international providers once a week)
- some of the participants should be semi-literate or illiterate to reflect the whole of the population
- awareness and access of international and national providers of news for middle and upper class

Hello, I'm _____ working with TNS Research International, an independent market research company. We're conducting a study on media use, and I wonder if I could ask you a few questions.

Q1a. RECORD GENDER:

Male	1	CHECK QUOTAS
Female	2	

Q1b. RECORD SOCIO-ECONOMIC CLASS:

Lower class	1	CHECK QUOTAS
Middle class	2	CHECK QUOTAS
Upper class	3	CHECK QUOTAS

Q1c. RECORD LITERACY LEVEL

Semi-literate or illiterate (e.g. can only sign own name)	1
Literate	2

Q1d. Can you please tell me your age: _____(write in)

18-34 years	1	CHECK QUOTAS
35+ years	2	CHECK QUOTAS

Q1e. Which is your first language?

Q1f. Do you speak any other languages? If so, what languages do you speak?

Q2. In general, how often do you access news anywhere (newspaper, mobile phones, TV, radio, internet etc.)?

Several times a day	1
Once a day	2
Several times a week	3
Once a week	4
Three times a month	5
Once a month	6
Less than once a month	7

Q3. In general, how often do you access international providers of news?

Several times a day	1	
Once a day	2	
Several times a week	3	
Once a week	4	
Three times a month	5	THANK AND CLOSE
Once a month	6	
Less than once a month	7	

Respondent details

NAME.....

ADDRESS.....

.....

POSTCODE.....MOBILE.....

Inform all respondents that interviews will be audio and video recorded and that under the Rules of the MRS Code of Conduct, any information given will only be viewed by the immediate team working on this project and that no personal information will be passed on to any third party who is not involved in this project.

Recruiter declaration

I declare that the respondent was unknown to me until this interview took place, and that the interview was conducted according to instructions and the MRS Code of Conduct.

Signed.....

Date

Recruiter: please take as many contact details as possible. This is especially important for full-time workers in the event of any changes or project cancellation at short notice. This will only be used in emergencies, and respondents will not be contacted at work under normal circumstances.

Appendix C. Discussion guide: trust in international providers of news

<p><i>Registration</i></p> <p>Instructions for the moderators at arrival of focus group participants/ registration:</p> <ol style="list-style-type: none"> 1) <i>Welcome participants upon their arrival.</i> 2) <i>Distribute name badges (or participant codes), offer refreshments etc.</i> 	
<p>Discussion guide – 2 hour group</p>	<p>Objectives</p>
<p><i>Introduction and warm up</i> [10 mins]</p> <p>Confidentiality of respondent identity Seeking honest opinions – no right or wrong answers Disagreement welcomed but respecting other’s views Permission to record the session/acknowledge those viewing Researcher’s neutrality Moderator introduction Respondent introduction</p> <ul style="list-style-type: none"> Name Location Family composition Occupation <p>Describe: one news story that particularly interested them in the last week</p>	<p>Confidentiality and purpose of session</p> <p>Introduce participants to put their responses in context</p> <p>Allow participants to get to know each other and be put at ease</p>
<p><i>News consumption</i> [20 mins]</p> <ul style="list-style-type: none"> • Through which media do you access the news (TV, radio, internet, mobile)? • Is that the most important media or is it secondary? What source do you use as a supplement for news? • Do you watch more than one channel/listen to more than one station in one evening? • What is the importance of choice between international and national providers? • And what is the importance of choice between different international providers of news? • What changed in the way you used news media in the last 5 years? • Do you access news on your phone? How (radio, text messages, internet)? • Do you receive news alerts on your phone? If so, from what providers? • Do you access news on websites? If so, through which websites? 	<p>Establish the role of news in consumers’ lives</p> <p>Do people watch several channels or are they loyal to a specific provider</p> <p>What is the importance of choice of different providers (national and international)</p> <p>What is the importance of choice of platforms:</p> <p>We want to explore not only what media the</p>

<p>Note to the moderator: <i>if the participants don't answer spontaneously, prompt them as to whether they use more or different channels, more or different platforms etc...</i></p> <ul style="list-style-type: none"> • What makes a good news provider in general (i.e. being easy to understand, trustworthy, objective...)? <p>Note to the Moderator: <i>make two columns on the flip-chart, one national, one international, then ask participants:</i></p> <p>What do you like/dislike about national providers? What do you like/dislike about international providers in general?</p>	<p>participants are consuming but also whether the material they consume and the nature of that consumption (i.e. the way they consume it) does differ across platforms: are they consuming the same content in the same way on different platforms; do they watch or read the same things across platforms etc.</p>
<p><i>Provider awareness/usage [30 mins]</i></p> <p>Note to the moderator: <i>if providers like France 24, Al-Jazeera, Al-Arabiya, Russia Today, Radio China, BBC World Service, VOA, DW or their partner stations are not mentioned spontaneously, please prompt participants and ask them why not mentioned.</i></p> <p><i>For international radio stations (e.g. DW, BBC World Service, Radio China, VOA), please ask them if they listen via a local partner station – and if so, which one? Ask them whether they are listening to the local station and just keep tuned in for the programme of the international provider or whether they specifically tune in to the local station to listen to the international provider.</i></p> <ul style="list-style-type: none"> • Which news providers are you aware of? • Of the providers that you just mentioned, which have you ever used? • Which ones do you really like? • Which do you use a lot? <p>Note to the moderator: <i>after this question, the moderator should write the names of the news providers on a flip chart while they are being mentioned. Then continue by saying:</i></p> <p>'Here are the providers/broadcasters that you said you were aware of or that you have accessed in the past. Can you give me some words (adjectives) that describe these broadcasters best?'</p> <p>Note to the moderator: <i>if respondents don't come up with answers like 'objective, reliable, trustworthy etc.', prompt them with the following question: For you to make a lot of use of these providers, how important are ...</i></p> <ul style="list-style-type: none"> • Objectivity <i>(if not explained then prompt explanation what is meant by this)</i> • Reliability <i>(if not explained then prompt explanation what is meant by this)</i> 	<p>Establish how awareness and usage influence the perception of certain providers and vice versa.</p> <p>Establish the affinity of participants to certain providers/brands.</p> <p>Establish the relationship to local partner stations that broadcast programmes of international providers</p> <p>How are these perceptions of the providers linked to trust and trustworthiness</p>

<ul style="list-style-type: none"> • Trustworthiness (<i>if not explained then prompt explanation what is meant by this</i>) • Independence (<i>if not explained then prompt explanation what is meant by this</i>) • [That they] speak to/for people like you? <p>Seeing all these providers, which would you say are the most objective, the most reliable, the most truthful, the ones you feel you can trust most? Can you explain why?</p> <p>Note to the Moderator: <i>Select the two national and the two international providers that are most watched and most popular within the focus group, and then ask the participants (as a group, not individually):</i></p> <ul style="list-style-type: none"> • ‘I would like to do a little imagination exercise with you: Let's imagine for a moment that news provider X (e.g. BBC) has become a human being, and comes in through that door there – what kind of person would that be? Would it be a man, or a woman? How old? What would s/he be like in his/her character? What profession would s/he be? What would be important to him/her? Where would he/she be in five years time? Would you want to be his/her friend? Why?’ <p>Note to the Moderator: <i>After the personification is finished for the four providers, please ask:</i></p> <p>‘Which one of those four would be your best friend, and why?’</p> <p>Note to moderator: <i>pick one of the providers just mentioned and ask:</i></p> <ul style="list-style-type: none"> • If brand X (e.g. BBC) is on radio, do you trust it more than when it is on TV or on the internet or on the mobile phone? • What are the key differences between the international providers (in terms of editorial content, presentation format, coverage of big news, coverage of Indian news/stories, diversity of stories/news) 	<p>How do different platforms/different content on platforms affect the affinity and trust to providers</p>
<p>Trust [40 mins]</p> <p>Note to the moderator: <i>this is a core section of the focus group discussion. Take time to let the participants explain.</i></p> <ul style="list-style-type: none"> • Can you explain to me what you understand by 'trust' (Note to the moderator: If the participants find this question too abstract, ask: ‘How would you explain the word “trust” to somebody who has never heard the term before?’) • Who do you trust in your life, and why? <p>Note to the moderator: <i>Ask the focus group to split into two teams. Continue by saying:</i></p> <ul style="list-style-type: none"> • ‘We have 12 cards with different pictures here of different sources of information who we trust or don't trust. You have already formed two teams. In each team, I would like you to rank these cards according to the ones which you trust most, and the ones which you trust least. There is one blank card with a question mark in case we forgot a source of information that you think we should have mentioned.’ 	<p>We want to understand what the participants' ‘circles of trust’ are in the context of their everyday lives: who do they trust, why, what do their circles of trust look like, and how do media in general fit into this circle.</p>

<p>Note to the moderator: distribute sets of cards to each team, assist illiterate participants if necessary.</p> <ul style="list-style-type: none"> • Ask each team to start with the most trusted source of information to explain their ranking and why it is ranked in this way. <p>Note to the moderator: continue with the ranking until all the cards have been ranked from most to least trusted source of information. Encourage the teams to interact and to debate their choices with each other. For the blank card, ask them if there is any source of information that we forgot and if so which one, and where it should be placed in the ranking. Include this additional source of information in the following questions.</p> <ul style="list-style-type: none"> • Which of these sources of information influence you the most, in general? • From the source of information depicted on these cards – who do you talk about with your friends? <p>Note to the moderator: Ask each team individually, prompt answer of people who don't speak up frequently.</p> <ul style="list-style-type: none"> • If we go to the cards that show different media: newspapers, radio, TV, internet, mobile phones, which of these do you trust most? Why? 	
<p><i>Consumption of international providers and trust [15 mins]</i></p> <ul style="list-style-type: none"> • Are there any moments when you turn to international providers? • Can you give examples of such moments? • Why do you choose international providers over national providers in these moments? • Are there any moments when you turn to <i>different</i> international providers than the ones you would normally access? • Why is that? Can you give examples? • And finally, let's imagine that one day you wake up and find that all the international providers of news are gone – how would you feel about that? Would you notice? Would it feel like a loss for you? Why? <p>Note to the moderator: ask participants to explain precisely what kind of moments these are, when they turn to different providers, which providers they turn to, and why they turn to these providers.</p>	<p>Establish how international providers of news fit into the participants' circles of trust in the context of their everyday lives.</p>

<p><i>Questionnaire [10 mins]</i></p> <p>Note to the moderator: hand out Questionnaire and ask them to fill in their code/names on top of the page and to complete the questionnaire and to hand it back to you once it is completed. Please make sure to discreetly assist illiterate/semi-literate participants with filling in the questionnaire.</p>	
<p><i>Thanks and closure</i></p> <p><i>Wrap up and thank at the end (incentive, etc. ...)</i></p>	

Appendix D. Socio-demographic questionnaire

Name: What is your name? _____

Age: In what year were you born? _____

Gender:

Male	1
Female	2

Employment: Are you currently working ... ?

Full time (30 hours a week or more)	1
Part time (8–29 hours a week)	2
Unemployed and wanting to work	3
Student	4
At School	5
Retired	6
Housewife	7
Retired	8
Other: _____	9

What is the highest educational or vocational qualification that you have?

(Or if you are still at school, what will you receive if you complete your next set of exams?)

Never went to school	1
Elementary school	2
High school	3
University BA or its equivalent	4
Higher degree than BA	5
Other: _____	6

At what age did you finish full-time education? _____

Which of the following things you own in your household (equipment must be working)?

	Yes	No
Radio	1	2
TV (Black & White)	1	2
TV (Colour)	1	2
Cable TV	1	2
Satellite TV	1	2
Computer	1	2
Microwave	1	2
Fridge	1	2
Freezer	1	2
Mobile phone	1	2

Do you yourself own a mobile phone?

Yes	1
No	2

Do you use your mobile phone for anything other than making and receiving calls?

Yes	1
No	2

IF YES: Do you use it for (tick all boxes that apply) ...

a) Sending text messages	1
b) Getting news from a service provider	2
c) Making money transfers	3
d) Accessing internet websites	4
e) Listening to the radio	
f) Watching video clips	
g) Anything else? _____	5

Do you yourself use the internet at home, work, school, college or elsewhere or have you used the internet anywhere in the past?

Yes. Current user	1
No, but used it in the past	2
Never used the internet	3

Where do you mostly access the internet?

At home	1
At school	2
At work	3
At internet cafe	4
At neighbour's house	5
Other: _____	6

In the past twelve months have you *personally* used the internet to ...

	Yes	No
a) Access the news about your own country	1	2
b) Follow news or developments in another country	1	2
c) Get information about a political debate, issue or politician	1	2
d) email	1	2
e) update your social networking site	1	2
f) Other: _____	1	2

How often do you consume/access news generally?

a) Several times a day	1
b) Once a day	2
c) A few times a week, but not every day	3
d) Once a week	4
e) a few times a month	5

f) once a month	6
g) less than once a month	7
h) I generally don't watch the news	8
i) Other: _____	9

Where do you mostly access the news?

a) TV	1
b) Radio	2
c) Newspapers	3
d) Mobile phones	4
e) Internet	5
f) Through family/friends	6
f) Other: _____	7

Do you generally watch or listen to more news and broadcasts from domestic or from international providers?

a) domestic	1
b) international	2
c) Other: _____	3

How often do you watch the news on TV?

a) several times a day	1
b) once a day	2
c) a few times a week, but not every day	3
d) once a week	4
e) a few times a month	5
f) once a month	6
g) less than once a month	7
h) Other: _____	8

How often do you listen to the news on the radio?

a) several times a day	1
b) once a day	2
c) a few times a week, but not every day	3
d) once a week	4
e) a few times a month	5
f) once a month	6
g) less than once a month	7
h) Other: _____	8

How often do you access the news on the internet?

a) several times a day	1
b) once a day	2
c) a few times a week, but not every day	3
d) once a week	4
e) a few times a month	5
f) once a month	6
g) less than once a month	7
h) Other: _____	8

How often do you receive updates on news events on your mobile phone?

a) several times a day	1
b) once a day	2
c) a few times a week, but not every day	3
d) once a week	4
e) a few times a month	5
f) once a month	6
g) less than once a month	7
h) Other: _____	9

How often do you access news from international providers?

a) several times a day	1
b) once a day	2
c) a few times a week, but not every day	3
d) once a week	4
e) a few times a month	5
f) once a month	6
g) less than once a month	7
h) Other:_____	9

How often do you access news from domestic providers?

a) several times a day	1
b) once a day	2
c) a few times a week, but not every day	3
d) once a week	4
e) a few times a month	5
f) once a month	6
g) less than once a month	7
h) Other:_____	9

Please think about all of the sources you use to get news about current events. Which channels, stations or websites are your MOST, second most and third most important sources of information?

Most important:_____

2nd most important:_____

3rd most important:_____

Which channels, stations or websites are MOST/second most/third most important for you to learn about events in your country?

Most important: _____

2nd most important: _____

3rd most important: _____

Not interested in this topic: _____

Which channels, stations or websites are MOST/second most/third most important for you to learn about events in the region?

Most frequent: _____

2nd important: _____

3rd important: _____

Not interested in this topic: _____

Which channels, stations or websites are MOST/second most/third most important for you to learn about international events?

Most frequent: _____

2nd important: _____

3rd important: _____

Not interested in this topic: _____

THANK YOU VERY MUCH FOR FILLING IN THIS QUESTIONNAIRE