AudienceScapes

Africa Development Research Brief

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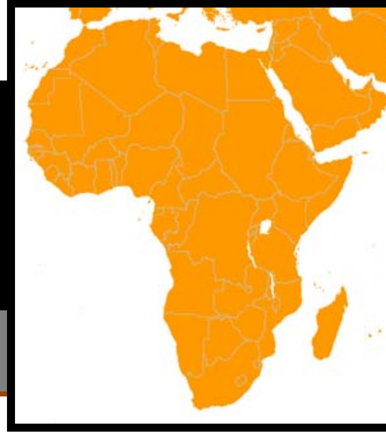

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Radio, Mobile Phones Stand Out in Africa's Media/Communication Landscape

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Mobile phones are rivaling radio as the most accessible communication or media platforms in both Kenya and Ghana, according to the 2009 AudienceScapes surveys.

Seventy-two percent of Ghanaians surveyed said they have a mobile phone in their home, despite the relatively burdensome cost of phones and phone services for many in this West African country. Household radio ownership nationally is 86 percent.

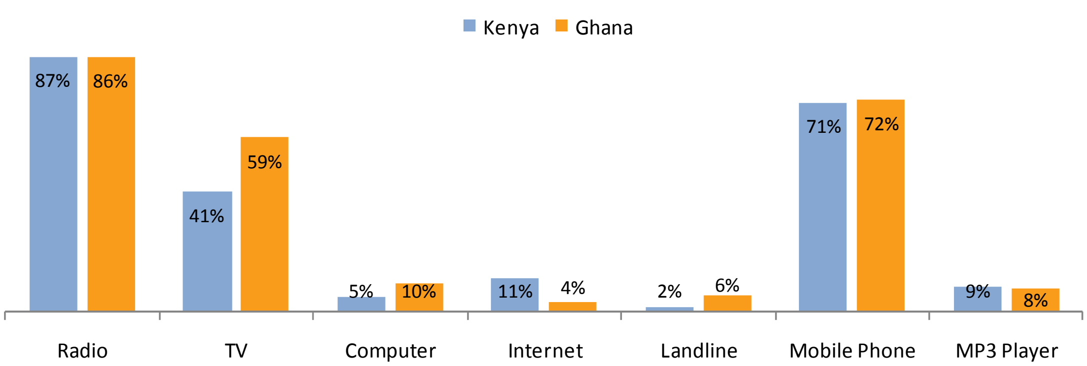
In Kenya, the numbers tell a similar story: 71 percent said they have a mobile phone at home, while 87 percent said they have a radio.

In contrast, access to a computer and the internet at home is low in both countries (10 percent of respondents in Ghana and 5 percent in Kenya said they have a

As part of the AudienceScapes project, in August, 2009 InterMedia carried out nationally-representative communication and media surveys in

Chart 1: Access to Information & Communication Technologies

% of respondents who have the item at home in working order

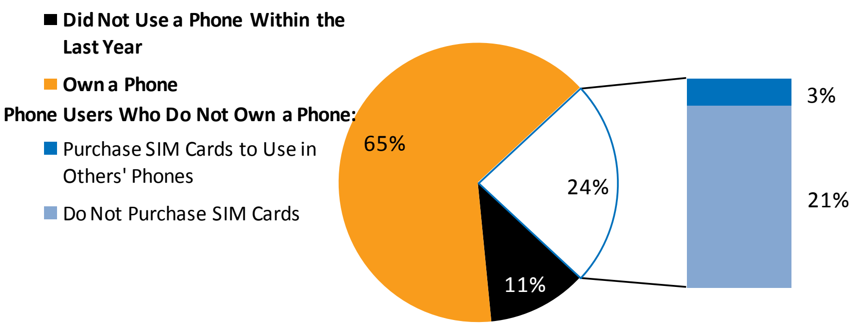


AudienceScapes National Surveys of adults (15+), July 2009. Ghana N=2051, Kenya N=2000.

computer at home, while 4 percent in Ghana and 11 percent in Kenya said they can access the web at home).

In Ghana, among those who own a mobile, 47% said they bought their handset within the previous two years, an indication of the recent exponential growth in the platform there. Leading mobile operators cited were MTN (73 percent of mobile phone owners said they were customers), Tigo (26 percent) and Vodaphone (18 percent). Zain and Kasapa were cited by less than 10 percent of respondents who are mobile users (the total is higher than 100 percent because many mobile owners carry SIM cards from more than one operator to take advantage of price and coverage differences).

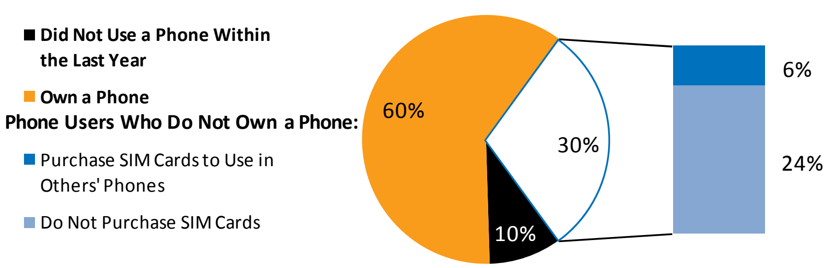
Chart 2a: Types of Mobile Phone Access in Ghana



AudienceScapes National Survey of Ghana, July 2009. N=2051 adults (15+)

In Kenya, 38 percent of phone owners said they bought their first mobile phone in the previous two years. Significantly, a quarter of Kenyan phone owners said they first bought a handset more than five years previously (a population segment analyzed in the AudienceScapes survey reports as "early adopters"), while only 18% of Ghanaians fell into this category.

Chart 2b: Types of Mobile Phone Access in Kenya



AudienceScapes National Survey of Kenya, July 2009. N=2000 adults (15+)

So why doesn't everyone own a mobile phone? The surveys found that many people perceive mobiles as costly –handsets, plans and calling credits add up. For example, 75 percent of respondents in Ghana said they think that owning a mobile is an expensive proposition. **Coverage is also an irritant**: 57 percent in Ghana country said it is difficult to get a signal everywhere they go.

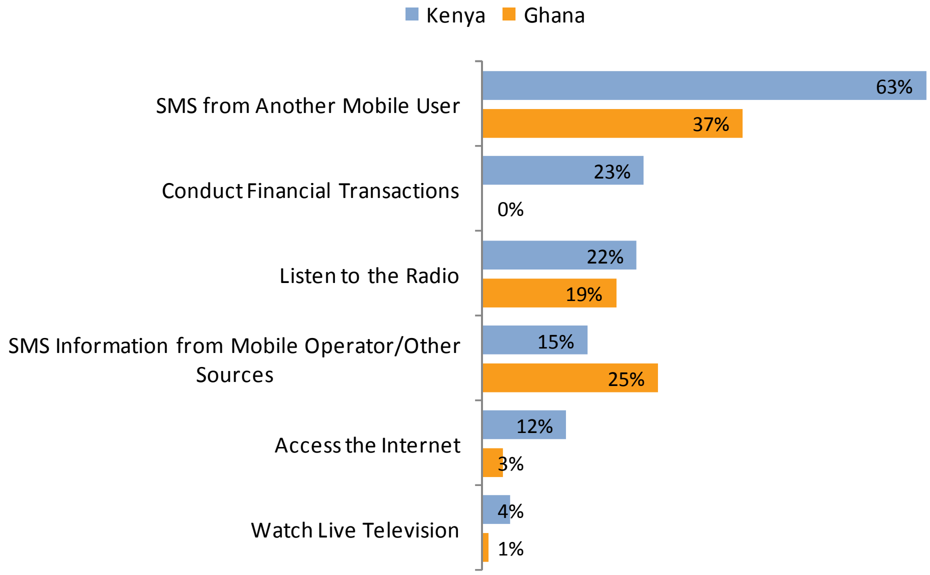
Lack of electricity for recharging phones and poor signal reception means that some rural residents in the two countries are still being left behind in the mobile revolution. In Kenya, for example, there was widespread dissatisfaction with the quality of the mobile signal by respondents, particularly in the Eastern region of the country and, surprisingly, Nairobi.

On the plus side, almost three-quarters of Ghanaians surveyed (and 86 percent of Kenyans) agreed that mobile phones are generally easy to use. And across all the major media and communication platforms covered in the surveys, the urban-rural access gap is narrowest in both countries for mobile phones.

With their coverage and accessibility, radio and mobile phones can potentially form a powerful tandem for reaching rural populations, and indeed they often emerge as crossover technologies; many people in both countries listen to radio via their mobile phone (See Chart 2).

Chart 3: How Mobile Phones are Being Used

% of phone users* who used a phone for each purpose at least weekly



AudienceScapes National Surveys of adults (15+), July 2009. Ghana N=1810 phone users, Kenya N=1809 phone users. *"Phone users" are respondentes who used a mobile phone for any purpose within the past year.

In Kenya, besides voice calls and text messaging, the next most-cited functions used are to conduct a financial transaction (at least weekly for 23 percent of phone users) and listen to the radio (22 percent of phone users). Mobile money was just being introduced in Ghana at the time of the survey; the function was only by a handful of respondents.

Word-of-Mouth—through friends and family or other community sources—remains a highly-used and trusted source of news and information for Kenyans, rivaling radio and well ahead of any other platform or source. Only 14 percent of respondents claimed to have received news and information from government officials, ranking them well down the list in terms of most-frequented sources.

In Kenya, 41 percent of respondents said they have a TV at home, but many also said they watch at a friends' or neighbors' house, or in a communal setting. Of the 58 percent of respondents who said they watched television during the previous week, fully a third said they do not own a TV at home. Twenty-three percent of respondents said they have not watched any TV at all in the previous year. In both Ghana and Kenya, virtually all TV owners said they use an antenna for reception—few respondents have satellite or cable—and that they can receive six or fewer channels.

The AudienceScapes project (www.audiencescapes.org) is aimed at bridging knowledge gaps about media preferences, personal communication habits and the use of information and communication technologies (ICTs) in Africa and in other developing regions. It is also a tool for identifying needs in media, communication technologies, development information and development policy.

The project's name refers to the benefits for development organizations of understanding the changing communication preferences and needs of their 'audiences'—the target populations and policymakers whom they are trying to support. Launched in April 2009 with support from the Bill & Melinda Gates Foundation*, AudienceScapes comprises four main elements:

- ***National quantitative surveys*** looking at (1) the general population's access to and use of media, access to and use of information and communication technologies (ICTs), and word-of-mouth communication habits; and (2) how these factors affect people's acquisition of knowledge about key development topics. Pilot projects are taking place in Ghana, Kenya and Zambia.

- ***In-Depth Interviews with policymakers*** to find out how they gather, assess, share and disseminate critical information related to development topics, and find out how global development partners can play a constructive role in this process**.** The interviews were begun in the same three African countries.

- ***The AudienceScapes website*** which provides access to the program's analytical reports as well as the quantitative survey data. The website also has detailed "Country Communication Profiles" of several countries in multiple developing regions, plus other resources for development practitioners working in communication, media development, technology development and policy dialogue.

- ***Custom Research and* Analysis** for organizations and companies in need of reports catering to their specific research needs.

For more information, contact us at audiencescapes@intermedia.org.

InterMedia (www.intermedia.org) is a nonprofit research, evaluation and consulting company with expertise in media, communications and development. We creatively equip clients to understand audiences, design projects, target communications and gauge project impact in developing and transitional societies worldwide.

**The findings and conclusions of the AudienceScapes research project are those of InterMedia and do not necessarily reflect the positions or policies of the Bill & Melinda Gates Foundation.*