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Development Research Report

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Tanzanian Media Environment
Current Access, Potential for Growth and Strategies for Information Dissemination

By Gayatri Murthy, InterMedia

Based on the AudienceScapes nationally representative survey of Tanzania, conducted in July 2010

March 2011

About InterMedia

InterMedia (www.intermedia.org) is a research-based consultancy providing strategic guidance and insight into the behaviors and views of people globally, especially among hard-to-reach populations. We provide counsel on effective engagement strategies in an increasingly complex media and communication environment, helping a diverse clientele map and measure how people gather, share and shape information.

Based in London, UK and Washington, DC, InterMedia works with partners across the developing world to strengthen local research capacity. On the ground in about 60 countries annually, InterMedia's research experts use innovative techniques to understand how information, communication and media resources can deliver impact.

About the Author

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The AudienceScapes Project

- ***How can targeted research help members of the development community hone their information-sharing efforts at the policy level and at the grassroots level?***

- ***What can members of the development community do to help improve the policy information flow in Africa, with a view toward supporting effective development policies?***

These questions are at the core of the multiyear AudienceScapes project launched by InterMedia in spring 2009. Its broad aim is to provide research and analysis to guide the information-sharing efforts of development practitioners at the grassroots and policy levels, thereby supporting more effective development outcomes. Pilot research was conducted in Ghana, Kenya, Tanzania and Zambia.

AudienceScapes researchers gather and analyze data at two levels: *among citizens* – measuring their access to and use of media and communication technologies as well as word-of-mouth networks, and how these relate to citizens' exposure to information on key development topics (health, agriculture and personal finance); *within policy communities* – mapping the complex "information ecology" in which development policymakers operate.

This report on access and use of mass media draws from a nationally representative survey of Tanzanian individuals conducted in summer 2010. Other reports from Tanzania address use of mobile phones, the policy information environment, and access to critical health information.

All AudienceScapes analytical reports, as well as a data query tool and other features, are available on the AudienceScapes website (www.audiencescapes.org). These resources give development professionals and their partners the means to provide critical information when and where it is needed to empower local communities.

InterMedia received funding for AudienceScapes from the Bill & Melinda Gates Foundation. However, the findings and conclusions of this report are those of InterMedia and do not necessarily reflect the positions or priorities of the funder.

We hope you find this report useful, and we welcome your feedback.

Peter Goldstein, AudienceScapes Project Director
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Report Methodology

This report uses AudienceScapes data from a nationally representative survey of Tanzania to describe how people of different social groups gather, share and access information through mass media – radio, television and newspapers. We also focus on whether the presence of mobile phones can further augment information dissemination using SMS and mobile radio. Media access and use trends are broken down by region and we profile both national and regional media outlets.

Notably, this report assists development professionals in crafting their communication strategies through mass media conduits. With knowledge of not only how much access to information Tanzanians have, but also what information sources they rely on and trust the most, development practitioners are better equipped to create strategies suited to the local context of their target audience.

The data presented in this report are based on a nationally representative survey conducted in July 2010 among Tanzanian adults age 15 and older. Using the 2002 Tanzanian National Census as the sampling frame and a stratified random sampling design, a nationally representative probability sample of 2,003 respondents was selected. The estimated margin of error is +/-2.2 percent with a 95 percent confidence interval. The survey was administered through face-to-face personal interviews; the data are weighted by gender and age groups.

This report is divided into the following sections:

- ***Chapter 1 "Media Access and Use":*** Common determinants of access (such as regional distribution, income and available infrastructure); key issues in Tanzanians' media use habits, particularly use differences between income levels and location of residence (urban or rural). Plus, profiles of those Tanzanians who lack access to various mass media and analysis of obstacles to access.
- ***Chapter 2 "Media Outlet Preferences in Radio, Television and Newspapers"*****:** Audience and programming profiles of specific media outlets.
- ***Chapter 3 "Regional Guide":*** Region-by-region breakdown of media use in general, and popularity and reach of specific stations, channels and newspapers.
- ***Chapter 4 "News and Information Access and Sharing":*** How do Tanzanians access information? What are their opinions on the information sources accessible to them? How do they share the information accessible to them?
- ***Appendix 1:*** Detailed information on the demographic breakdowns of audiences for various media outlets.
- ***Appendix 2:*** Profiles of media use in each region of the country.

A Note about the income variable used in this report:

AudienceScapes analysts define income levels based on a self-assessed, qualitative measure. Respondents are asked: “Which of these answers reflect your family’s financial situation?” The available answers are: “We don't have enough money even for food” (identified as "Tier 1" respondents in this report, n=270); “We have enough money for food, but buying clothes is difficult” (Tier 2, n=527); “We have enough money for food and clothes and can save a bit, but not enough to buy expensive goods such as a TV set or a refrigerator” (Tier 3, n=869); “We can afford to buy certain expensive goods such as a TV set or a refrigerator”, or “We can afford to buy whatever we want” (combined as Tier 4, n= 232).

The AudienceScapes surveys ask respondents to state their average monthly monetary income, but the analysis team does not consider the responses to be sufficiently reliable for rigorous analysis. In general, monetary income questions confront two challenges: the uncertainty of some respondents about their income level expressed in monetary terms alone, and the unwillingness of some respondents to divulge their level of monetary income. This creates distortions and risks misleading users of the data.

Although the qualitative measures lack the specificity of monetary values, they have the advantage of assessing respondents' incomes in the context of their own purchasing power. Even if respondents provide accurate figures on their monetary income, these do not reflect relative costs of living in different areas. For example, a rural inhabitant who earns $50 a month may have considerably more purchasing power than an urban dweller who earns the same amount because prices of goods in the rural setting may be cheaper than in urban areas.

Report Summary

Chapter 1: Media Access and Use

- There are close to 47 FM radio stations, 537 registered newspapers and a dozen television stations in Tanzania.
- Radio access is fairly widespread throughout the country – making it the most consistently available medium for Tanzanians across income levels and locations.
- Income levels play a substantial role in determining household access to media devices other than radio. Household access to television more than triples between income tiers 3 and 4 (highest).
- Computer and internet access at home is very limited across Tanzania. For mobile phones, 62 percent of Tanzanians reported having household access. This increases more gradually with each rising income tier.
- At the highest income tier, radio, television and mobile phone access become identical.
- Television viewership outside the home is an important factor: 27 percent have household access, 41 percent watch weekly.
- Communal watching is higher among those with lower tier incomes, and reduces as income levels increase. Rural viewers are more likely to watch TV outside their homes than urban viewers. The communal nature of TV viewing in many areas gives it wider reach than household ownership would suggest.
- Rural residents and women are less likely to use mass media than their more urban and male counterparts.
- Common obstacles to television and newspaper use problems with electricity and not having a television set at home. The largest proportion of non-readers cites non-availability in their area as the prime reason for non-readership.

Chapter 2 Media Outlet Preferences in Radio, Television and Newspapers

- Few radio stations attain full national reach. Those with national reach are the state-owned TBC Taifa (also known as RTD) and TBC FM, as well as private stations such as Radio Free Africa, Radio One and Clouds FM.
- A crucial information gap is the lack of radio stations broadcasting in regional languages -- besides Kiswahili and English.

- While respondents may listen to call-in shows, radio is seen more as a medium for entertainment than as a forum for voicing one's opinion.

- Three stations have large enough reach to be considered national stations: state-run TBC 1 (also known as Televisheni ya Taifa (TVT)), Independent Television (ITV) and Star TV.

- Tanzanian TV broadcasts very little original content, and borrows heavily from foreign broadcasters.

Chapter 3 Regional Guide

- The southeastern region of Tanzania is characterized by a particularly low concentration of television or newspaper users.

Chapter 4 News and Information Access and Sharing

- Eighty-three percent of Tanzanians said they get news and information from radio, making it the leader among both media and non-media sources. Radio is thus the most consistently available media in Tanzania – and any communication strategy to any segment of the population must feature radio dissemination prominently.

- Television is considered a credible source for information, although only people with higher incomes get information from it regularly.

- Word-of-mouth networks (among friends and family) is the second most important source of information, although Tanzanians do not trust the information they receive through it as much as that received from the radio.

- There is untapped potential for SMS to be a tool of communal information sharing, given the high penetration of mobile phones. While many have access to this medium, few are using it effectively to share information.

- **Recommendation: If information broadcast on the radio is then further disseminated via SMS to friends and family, it has the potential to reach more people and lends the information transmitted more credibility because it is conveyed by a trusted social contact.**

- As incomes rise, Tanzanians' range of information sources expands. **To reach elites in Tanzania, especially those at the highest income tier, a combination of television broadcasts and mobile phones are possible avenues.**

- Newspapers rank at the bottom of sources of news and information used regularly by Tanzanians, mainly due to poor circulation. Their use in any communication strategy should be limited to elites.

Chapter 1: Media Access and Use

There are close to 47 FM radio stations, 537 registered newspapers and a dozen television stations in Tanzania, as reported by Freedom House in 2010.[1] The Media Institute of Southern Africa (MISA) reports that there has been a definite increase in media outlets since the introduction of a multi-party democratic system of government in 1992.[2] In this chapter, we profile those with *access* to the three dominant mass media – radio, television and newspapers. We also track those who regularly *use* mass media and look for signs of communal use of media.

Given the many sources available, it would seem that Tanzania has a varied media environment, with diverse and plural sources of information for all citizens. But some Tanzanians face significant obstacles in their access to information due to location of residence, income level and gender inequality.[3] The African Media Barometer's 2010 report on Tanzania says:

> *Despite the relatively high number of newspapers, and radio and television stations in the country, media content largely fails to effectively meet the information, educational and entertainment needs of the various sectors of the population. As such, it is clear that Tanzania still lacks a diverse broadcasting sector essential to a functioning democracy that can contribute to the public interest.*[4]

It is thus equally useful to understand *non-users* -- such groups are often of interest to media development practitioners, and our research can show who they are and what barriers to information access they face. For broadcast media such as radio and television, the unreliability of electricity and high costs of batteries hamper access for poorer Tanzanians. For another type of mass media – newspapers – poor circulation in remote areas, coupled with low literacy levels are formidable barriers.

1.1 Access

Household access to radio (*defined as the percentage of respondents who said they have access to a radio set in their households*) is fairly widespread, though there are some differences between income tiers (**see Figure 1**).

The disparities are more pronounced for household TV access. Household access to television more than triples between income Tier 3 and 4 (highest). For mobile phones, access increases more gradually with

[1] Freedom House – Freedom of the Press 2010
http://www.freedomhouse.org/template.cfm?page=251&year=2010&country=7931

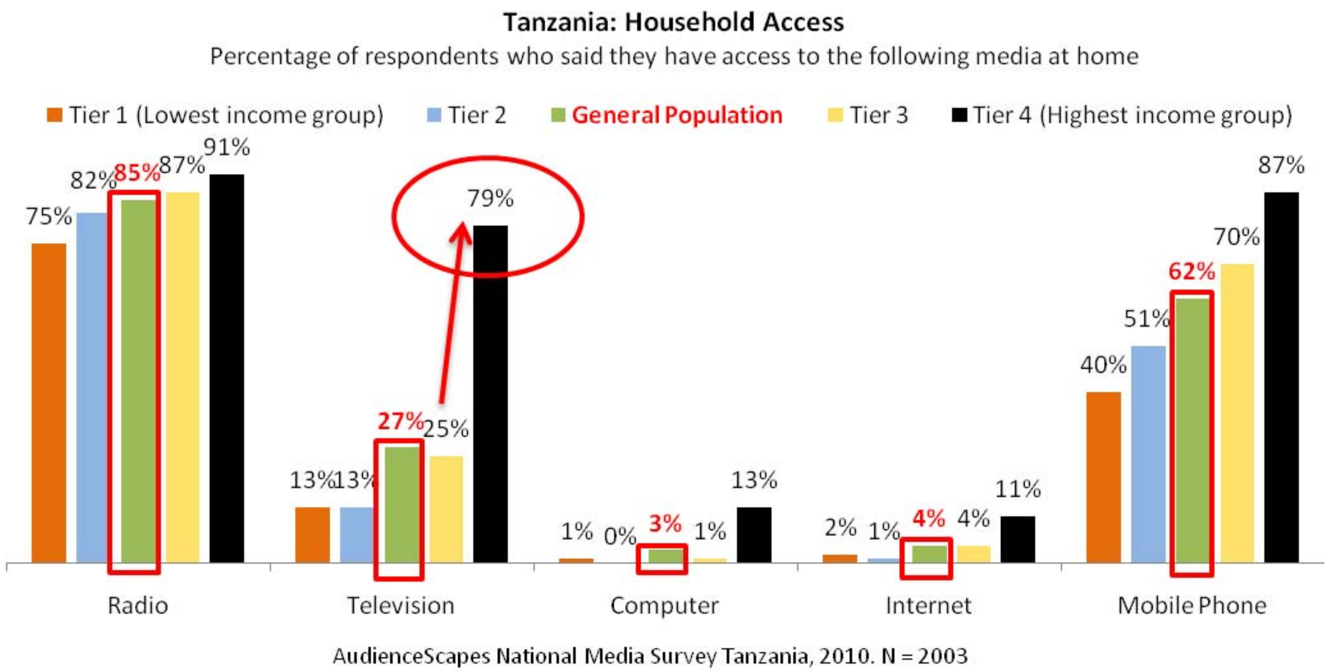
[2] Tanzania Africa Media Development Initiative with BBC- Report available at h http://www.bbc.co.uk/worldservice/trust/researchlearning/story/2006/12/061204_amdi_tanzania.shtml, Pg 12

[3] Tanzania Report 2010 African Media Barometer. Published by the Media Institute of South Africa and FES Media Africa. Available here: http://www.misa.org/programme/mediamonitoring/AMB%20Tanzania%202010.pdf, Pg 5

[4] Ibid

each rising income tier. At the highest income tier, radio, television and mobile phone access becomes identical; that is for those at the highest income tier, broadcast media and mobile phones are equally accessible.

Figure 1

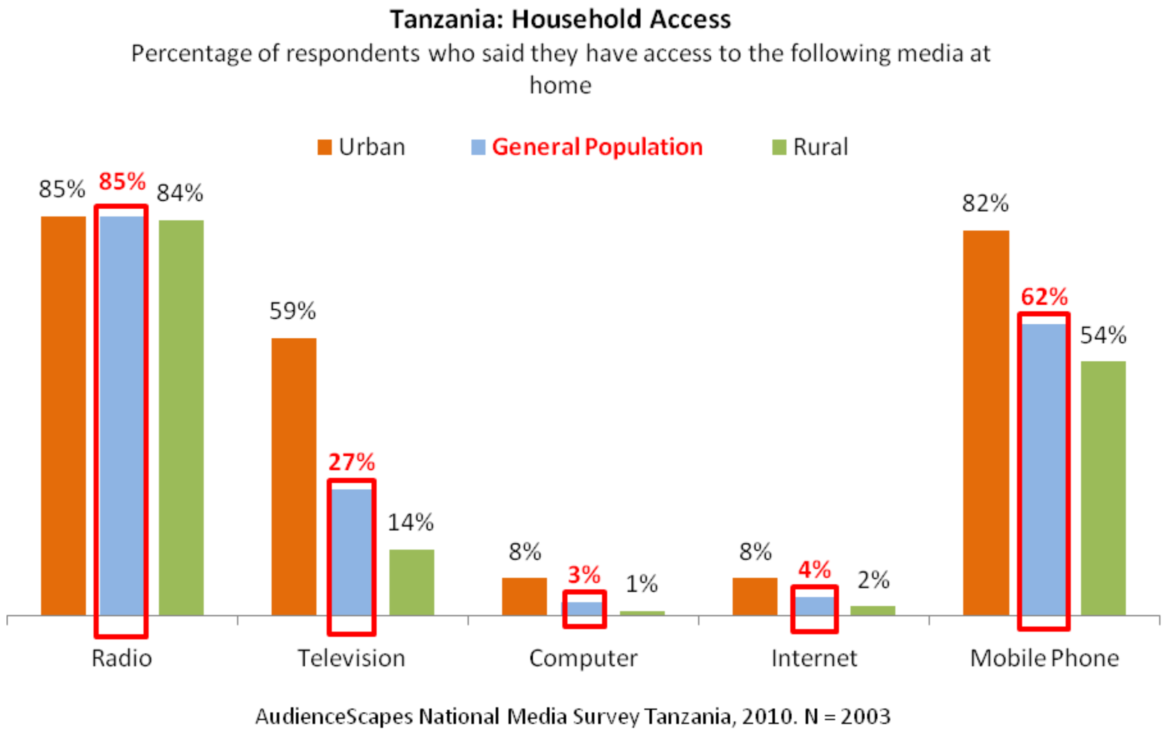


Computer and internet access at home is very low and only a few of those in income Tier 4 can claim to enjoy these services at home.

Similar disparities in household access to television and mobile phones are also seen when we break down access by location (urban or rural, see Figure 2). Television access varies greatly with location – it is double the average for urban residents and is less than half that for rural residents. Regarding mobile phone access, rural residents are only slightly behind the national average although access levels are considerably higher for urban residents.

Radio access remains pretty uniform in both urban and rural areas, making it the **most consistently available medium to reach Tanzanians across income levels and locations**.

Figure 2



Among the regions[5] of Tanzania, Dar es Salaam enjoys the highest level of television access (71 percent) of any region. Other regions with moderately high access include Arusha (43 percent), Kilimanjaro and Mwanza (41 percent for both). Other regions are far behind. Household access to mobile phones is also highest in Dar es Salaam (91 percent). Other regions with high mobile access include Rukwa (81 percent), Dodma (79 percent), Tanga (79 percent) and Mwanza (73 percent; *more regional analysis in Chapter 3).*

Access levels are not greatly affected by other demographic factors -- such as gender and age. Only slight variation exists where men are more likely than women to have access to mobile phones (65 percent versus 59 percent), and among age groups, those between 25-34 and 35-44 are most likely to have mobile access.

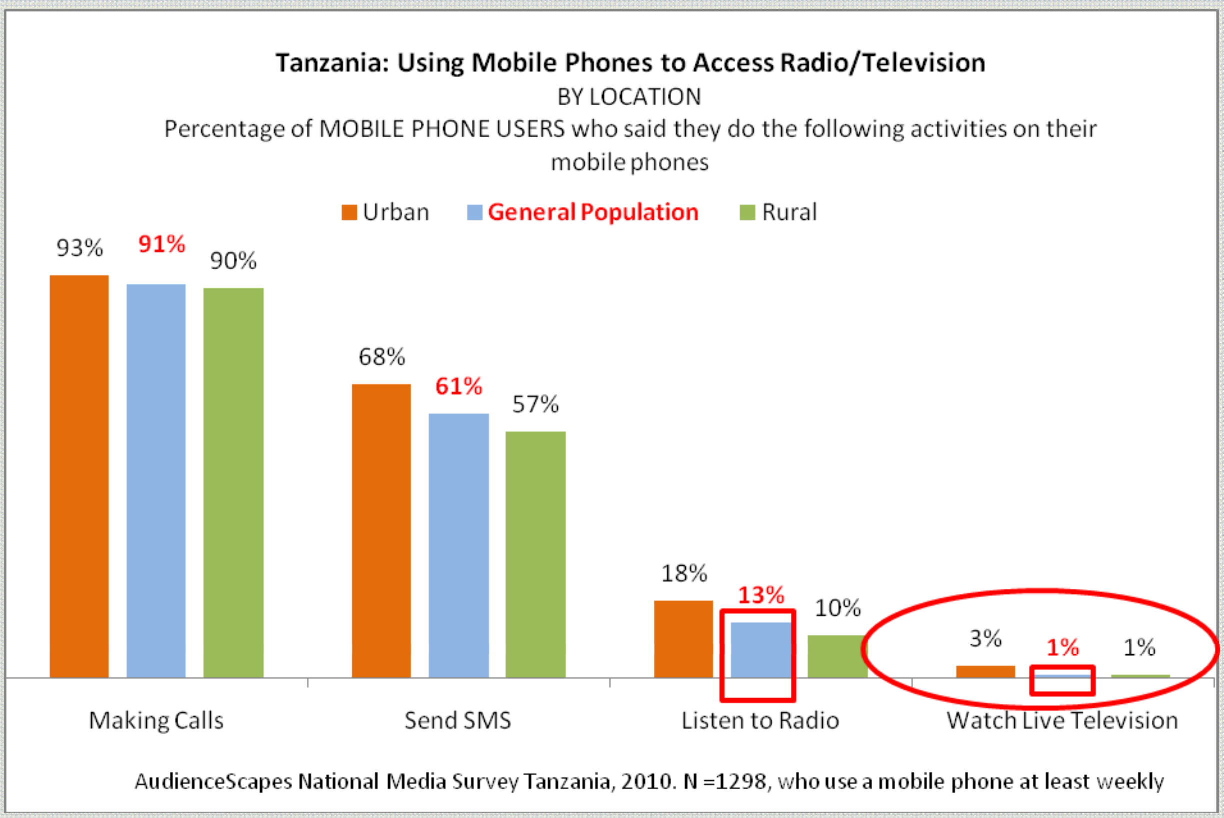
[5] Tanzania is divided into 26 regions (mkoa), 21 on the mainland and 5 in Zanzibar. Tanzania's regions are: Arusha · Dar es Salaam · Dodoma · Iringa · Kagera · Kigoma · Kilimanjaro · Lindi · Manyara · Mara · Mbeya · Morogoro · Mtwara · Mwanza · Pwani · Rukwa · Ruvuma · Shinyanga · Singida · Tabora · Tanga · Zanzibar (Zanzibar is further divided into Pemba North · Pemba South · Zanzibar Central/South · Zanzibar North · Zanzibar Urban/West, but for this survey was taken together, making a total of 22 regions covered).

Using Mobile and Internet for Accessing Mass Media

Media Convergence Still in Nascent Stages

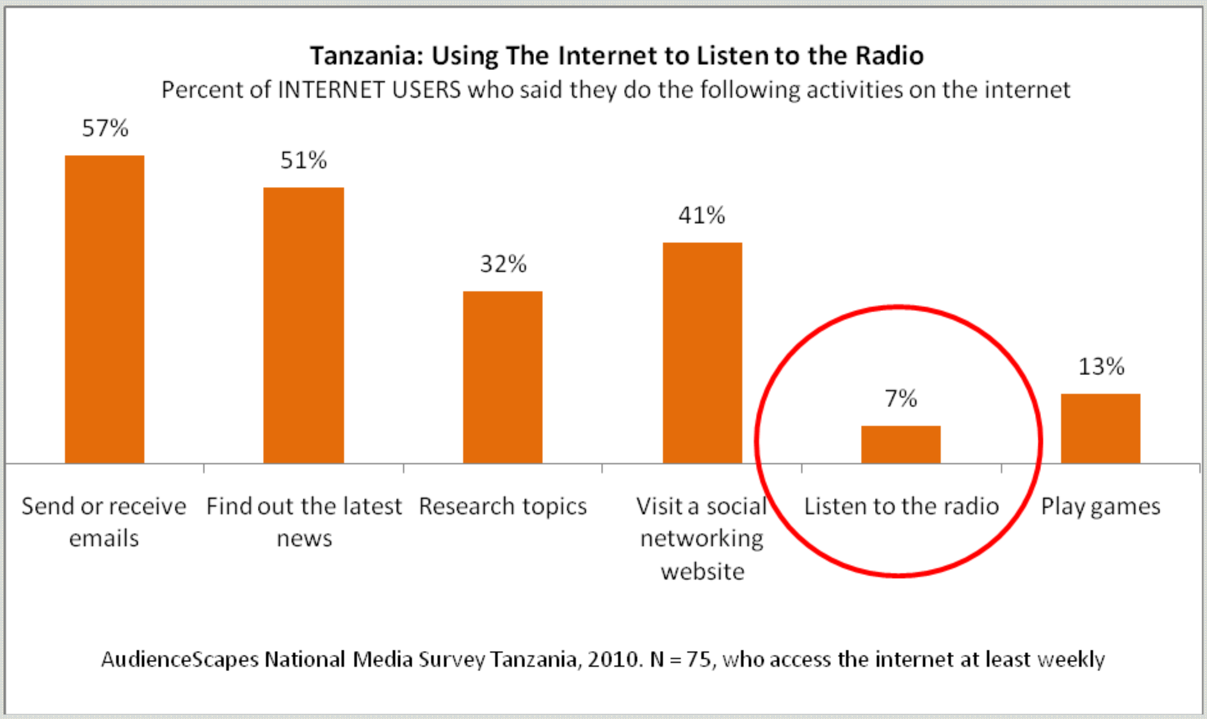
Throughout Africa, the rise in access to mobile phones also represents a potential boost for access to broadcast media. Those who have access to mobile phones can also listen to radio via their phones (through fitted FM radio receivers, easily available in Africa). Among more urban and affluent Tanzanians, watching video and live television on mobile phones is prevalent. This is important for overall media development in the country -- it could increase access to and consumption of traditional mass media (radio, television and newspapers) via new platforms (mobile and the internet). Being able to consume mass media in this way also gives access to those who are either travelling or otherwise not close to a radio or television set.

AudienceScapes survey results in Tanzania show that only 13 percent of all weekly mobile phone users listen to the radio on a mobile phone (see chart below and compare with neighboring Zambia where 30 percent of all mobile phone users listen to the radio on their phones). With 62 percent of the population in Tanzania saying they are weekly mobile users, there is still ample potential for growth for this method of radio listening.



In general, using mobile phones to access radio is slightly more common among urban respondents than their rural counterparts; very little variance was observed between men and women. The proportion of listeners increases as income increases. **Listening via mobile phones is highest for those 34 and younger (16 percent of mobile users listen this way) and decreases as age increases (between 8 and 9 percent for those 35 and older)**. Accessing television via mobile phones is very rare, even among those Tanzanians who have high incomes.

Internet penetration is still very low in Tanzania; only 3 percent of respondents say they used the internet in the past week. Among these, only 7 percent said they use the internet to listen to radio (see chart below: Compare this with neighboring Zambia where 37 percent of internet users listen to radio online).



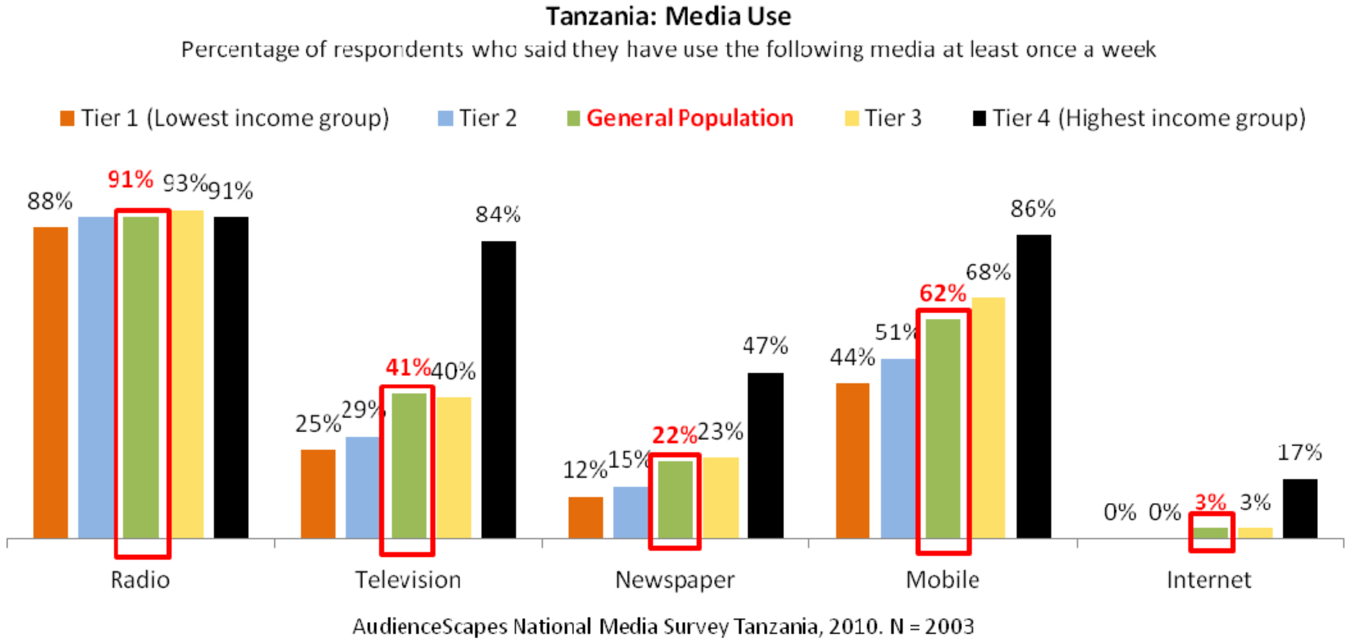
1.2 Weekly Use

In addition to having household access to a mass media device, the frequency with which respondents say they *use* a medium[6] can illustrate evidence of shared use of media -- such as communal television viewing, sharing newspapers among households, etc. It can also point to instances of limited use of a medium despite its availability in the household, thus giving a more holistic view of media reach.

Measures in the survey of weekly television viewership -- the frequency with which respondents said they watch television -- suggest that viewership *outside the home* is an important factor. In other words, there is a difference (27 percent have household access, 41 percent watch weekly) between the percentage of people saying they have household access to a given medium and the percentage of people who say they use that medium regularly (compare Figure 3 with access levels in Figure 1 above).

[6] *Regular users* are defined in this report as those who use a medium at least weekly.

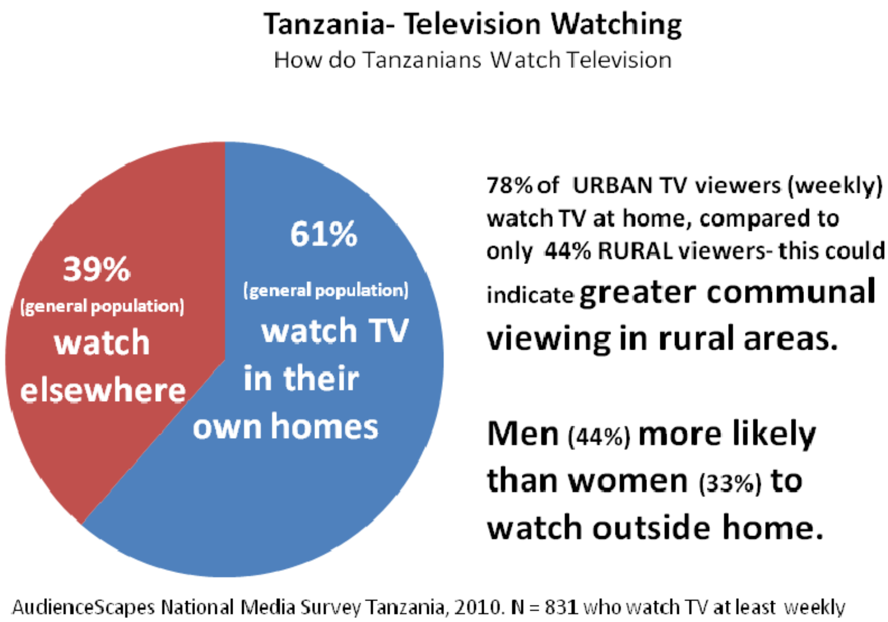
Figure 3



Communal watching is higher among those with lower tier incomes, and reduces as income levels increase.

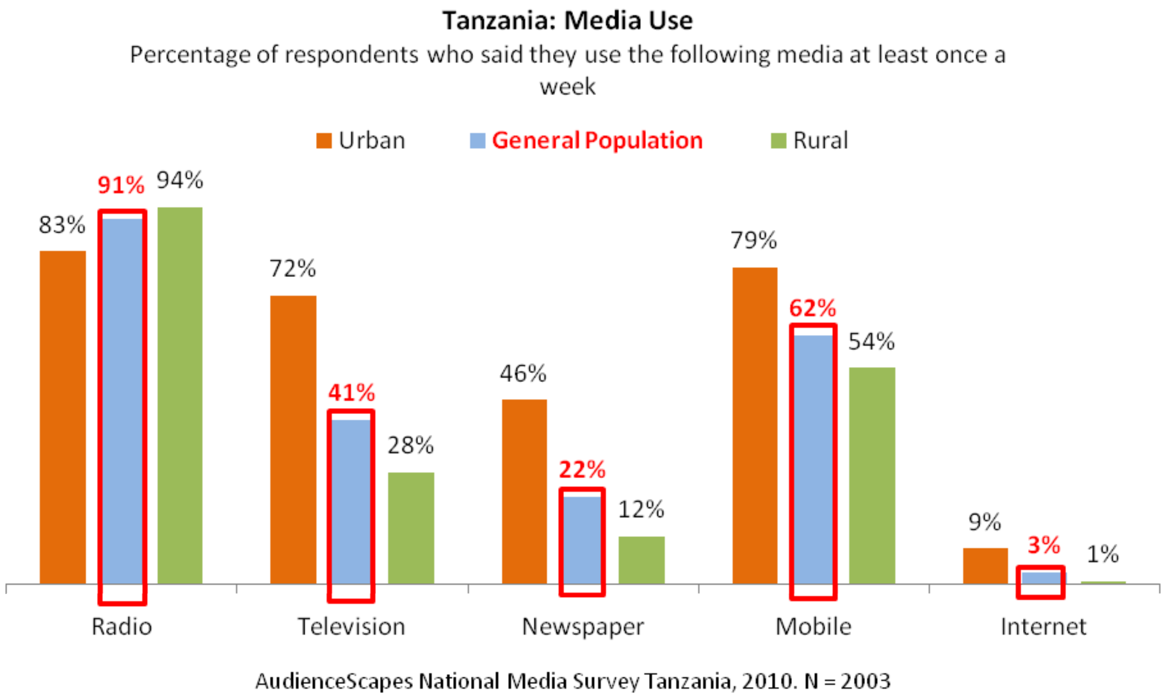
When broken down by location, as **Figure 4** shows, rural viewers are more likely to watch TV outside their homes than urban viewers.

Figure 4



Analyzed by location, newspaper readership increases rapidly with increased income and is higher for urban residents. Both richer and more urban residents have higher access to education (and thereby literacy) as well (**Figure 5**).

Figure 5

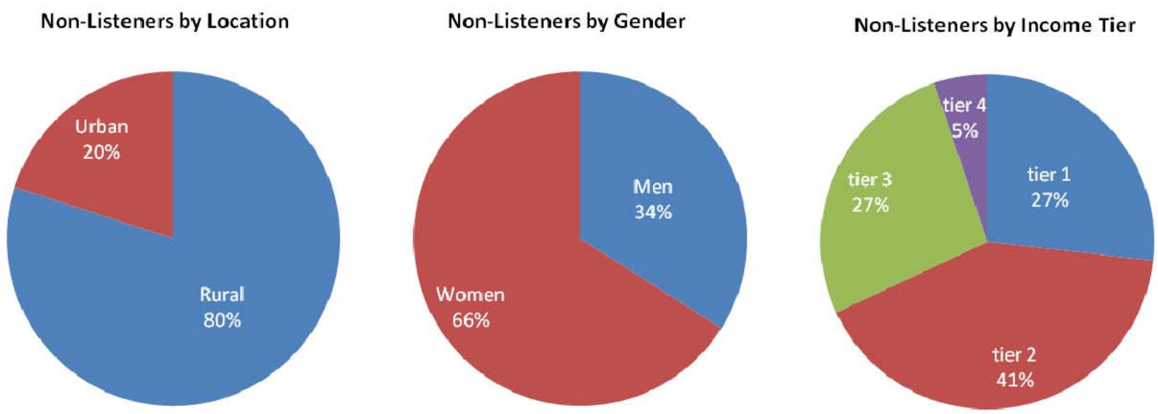


1.3 Barriers to Media Access and Use

It is also insightful to profile *non-users*: those who do not use television and newspapers and those without access to these media. Often, such groups are the same and thus it is instructive to know about the challenges faced in reaching these people.

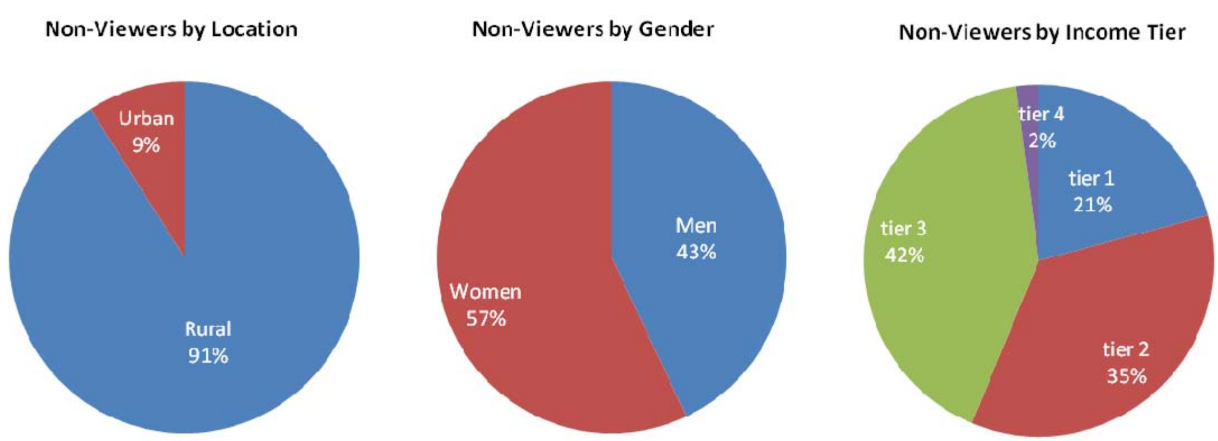
For the purposes of this report, non-users are defined as those who have never used a given medium. Figures 6, 7 and 8 profile those who said they had never used radio, television or newspapers.

Figure 6: Radio Non-Listeners



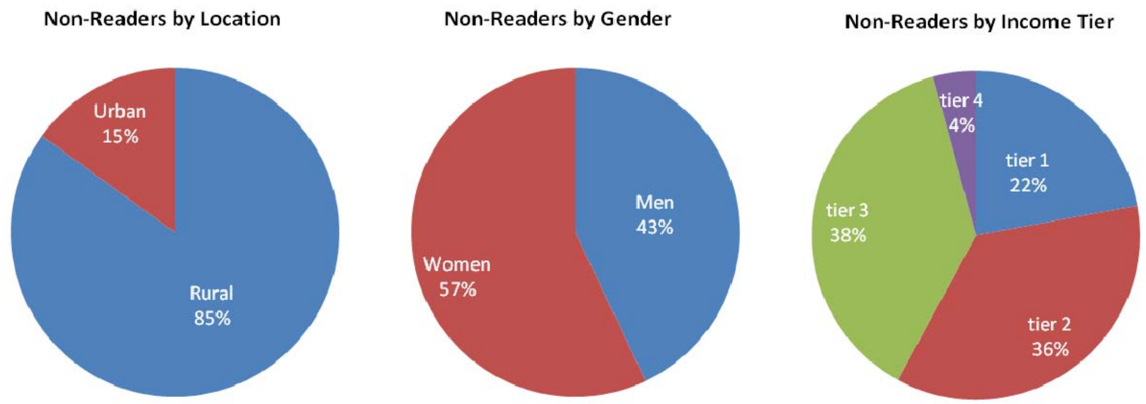
AudienceScapes National Media Survey Tanzania, 2010. N = 99 non-listeners

Figure 7: Television Non-Viewers



AudienceScapes National Media Survey Tanzania, 2010. N = 574, non-viewers

Figure 8: Newspapers Non-Readers

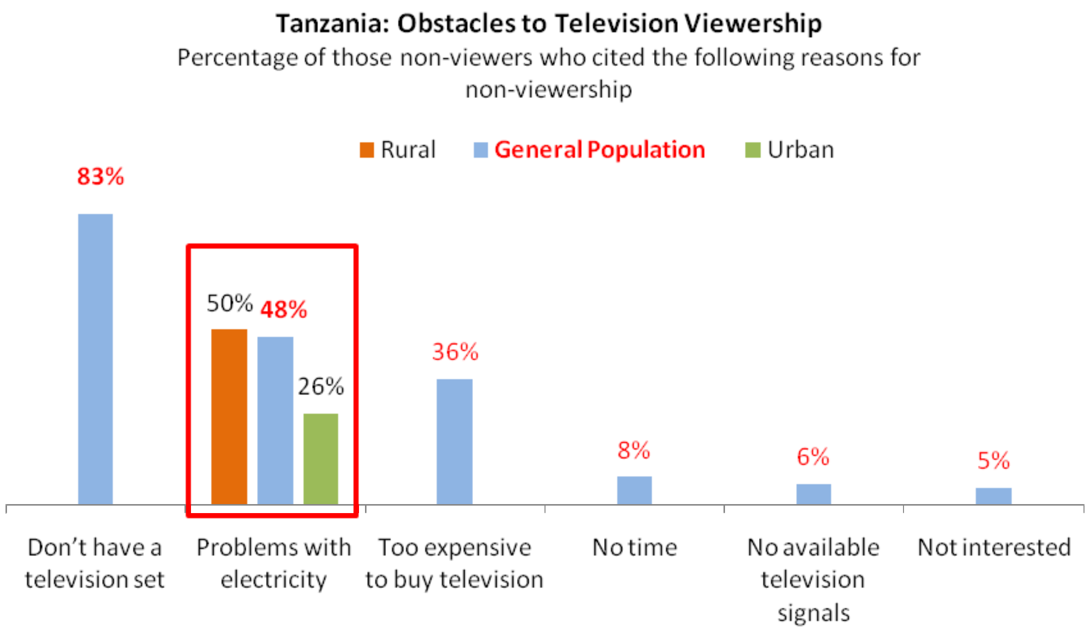


AudienceScapes National Media Survey Tanzania, 2010. N = 829, non-readers

Figures 6-8 show that rural residents and women are more likely to be non-users than their more urban and male counterparts. In terms of income, both use and non-use trends show a great disparity between the fourth (highest) income tier and the bottom three income tiers. Access and use increase sharply from Tier 3 to Tier 4 (see charts above) and these respondents are least likely to face obstacles to use (**refer to Figures 6-8**).

Figure 9 lists the common obstacles hindering access and use of television. Common deterrents to television and newspaper use are closely linked to issues of media access. For instance, problems with electricity and not having a television set at home are the principle deterrents to use (**see Figure 9**).

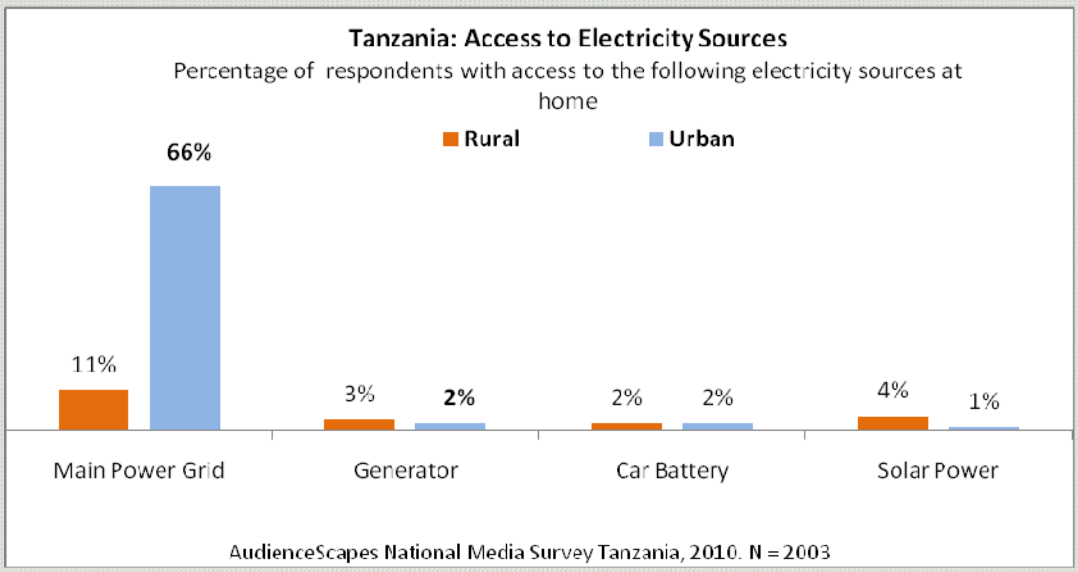
Figure 9



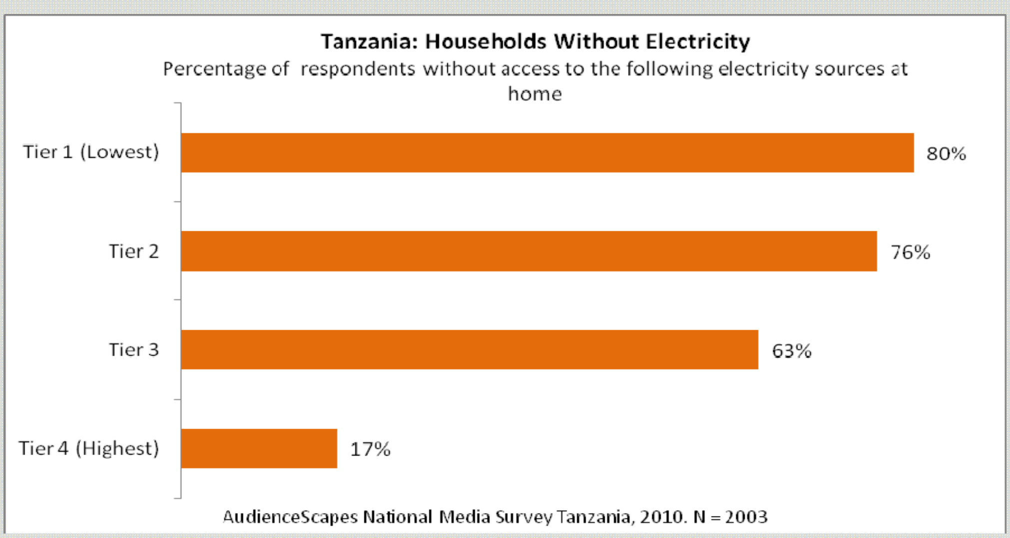
AudienceScapes National Media Survey Tanzania, 2010. N = 574, non-viewers

Lack of Available Electricity Sources Poses an Obstacle for Access to Broadcast Media

Close to half of all Tanzanians who say they have never watched television cited "problems with electricity" as one of the reasons for non-use. Lack of stable sources of electricity at home has an impact on the ability to access media and communication devices, and is disproportionately a problem in poorer and more rural provinces. Those in rural locations have much lower access to main power grids than those living in more urban locations (see chart below).



Respondents with Tier 1, 2 and 3 income levels are more likely not to have access to electricity in their households. On the other hand, those with Tier 4 income levels are most likely to have consistent access to the main power grid, and therefore more likely to rely on it primarily to power their media and communication devices. As a result, those with high incomes (and in turn more stable electricity sources) are thus more likely to have access to media.

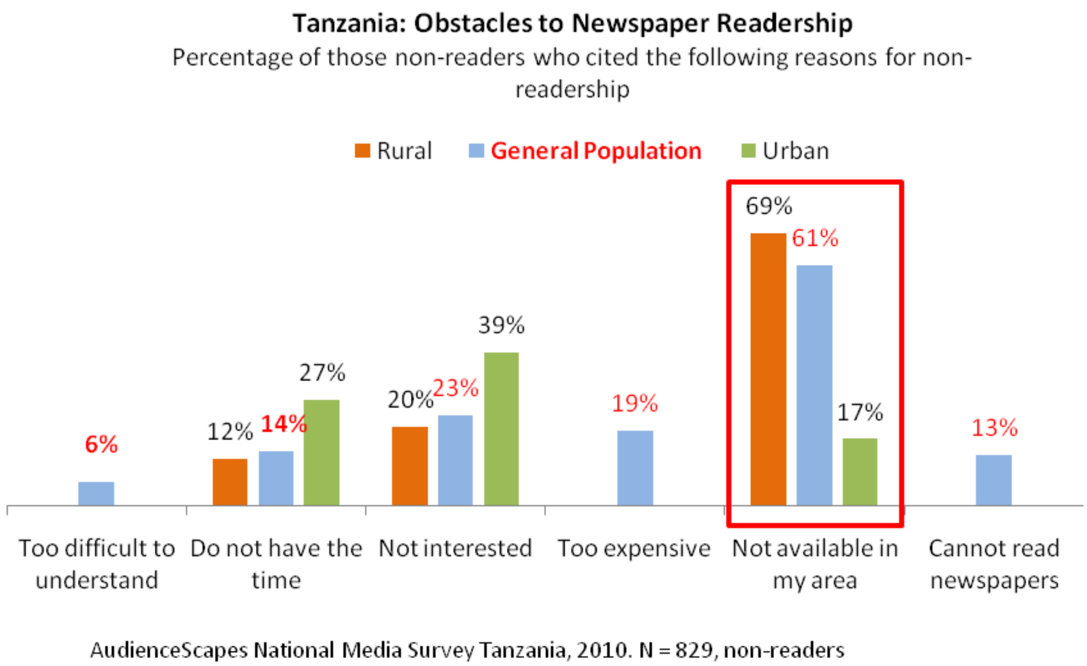


Newspaper readership is highest in the more developed regions of Dar es Salaam and Rukwa province, where circulation is also higher. The BBC and AMDI report suggests that readership is also high in the urban regions of Arusha, Moshi, Mbeya, Zanzibar and Mwanza.[7] Outside these urban centers, circulation is very poor, and our respondents' self-reported reasons for non-readership corroborate this.

The largest proportion of non-readers cites non-availability in their area as the prime reason for non-readership. Notice how, "non-availability" is a bigger problem in rural areas (Figure 10). On the other hand, urban non-readers are more likely to say they are "not interested" or "do not have the time."

Most of the national newspapers such as *Nipashe*, *Majira* and *Mwananchi* publish in Kiswahili[8], which is spoken and read by most people in the country. As a result, "cannot read" or "too difficult to understand" are not primary reasons for non-readership.

Figure 10



Due to Tanzania's large geographical size (364,900 square miles), in combination with low population density, few urban centers and scattered rural population, getting information to citizens has been a historic problem. [9] Newspapers tend to be urban-centered, and sometimes getting radio signals to

[7] BBC AMDI 2005, Pg 21

[8] Ibid

[9] The Mass Media Systems of Kenya and Tanzania- A Comparative Analysis. Africa Media Review, Vol. 1 No 1. 1986. African Council on Communication Education http://archive.lib.msu.edu/DMC/African%20Journals/pdfs/africa%20media%20review/vol1no1/jamr001001009.pdf pg 5

remote areas requires capital expenditures that are prohibitively expensive for non-state, private or community radio stations.

(See Chapter 2 for more on individual radio stations in remote areas)

Chapter 2: Media Outlet Preferences in Radio, Television & Newspapers

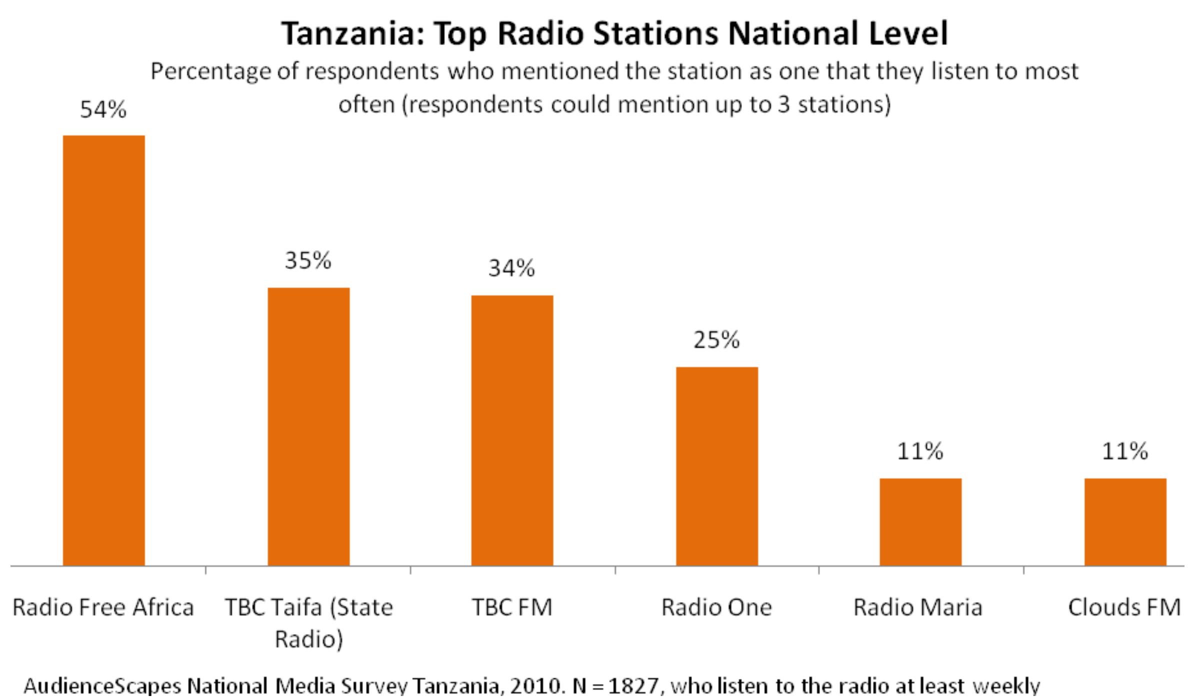
This chapter focuses on specific broadcast outlets. We classify Tanzania's media landscape by level of reach as defined by our respondents, examine each outlet's ownership structure, discuss what influences access and viewing patterns for *specific* outlets and whether some media outlets have a clear advantage in reaching the widest populations.

The audience for the most popular outlets is also broken down by geographic and demographic differences.

2.1 Radio

Previously, we highlighted the predominance of radio in Tanzania's national media landscape; however, **given the country's large geographic size and low population density, few stations are able to have full national reach**. Those with national reach are state-owned TBC Taifa (also known as RTD) and TBC FM, as well as private stations Radio Free Africa, Radio One and Clouds FM. Each one of these stations appears in the list of stations Tanzanians nationwide said they listen to most often (Figure 11).

Figure 11



Radio broadcasting in Tanzania first began in 1951 as a government operation. In 1956, while still under colonial control, the state-owned Tanganyika Broadcasting Corporation (TBC) began broadcasting nationally. Following independence, TBC was placed under the Ministry of Information and Broadcasting in 1965 and renamed Radio Tanzania Dar es Salaam (RTD) or TBC Taifa, its current name. Since that period, TBC Taifa has been used by ruling parties as a propaganda outlet. Following liberalization in 1992, the Tanzanian government allowed the establishment of private radio stations. BBC reports that there has been an increase in the number of licensed radio stations in Tanzania, from 14 in 2000 to more than 47 stations in 2006. This increase is exhausting the frequencies for broadcasting in the capital, Dar es Salaam. Frequencies for broadcasting for new stations are only available in other regions within Tanzania *(more regional analysis in next chapter)*.[10]

Radio Free Africa is the most popular radio station in the country and is owned by the Sahara Media Group, Ltd. This company also owns Kiss FM, which broadcasts in English, and the television station Star TV.[11] Star TV is available throughout the country, 24 hours a day and its broadcasts are in Kiswahili. Radio Free Africa is more popular among men and rural residents. Among age groups, the youngest group – those between 15-24 – listens to it most often. *(For demographic breakdown of audience, see Appendix 1.)*

TBC Taifa (also known as RTD) is the state-owned nationally available station broadcasting in Kiswahili. **TBC FM** started broadcasting after liberalization in 1992, when many private stations became available throughout the country. It was established to compete with the private stations' more commercial and entertainment-related content -- it broadcasts mainly music and entertainment programs in Kiswahili.

The popularity and reach of **state-owned TBC stations** is due partly to the funding available to them from the government. Commercial stations on the other hand have limited resources to invest in better technology to ensure better reach. Since many commercial stations have less reach than state radio does, they also receive lower revenues from advertising, thus putting them into a cycle of low growth.

Although it has been accused of having very little editorial independence in the past, TBC Taifa now invites representatives of opposition political parties to air their views in a move toward more balanced and fair coverage.[12] Prominent media practitioners interviewed by AfroBarometer stated that:

> *"……..there is a need for the TBC to do more and to be increasingly accessible to the public on platforms such as mobile phones and the internet, adding that TBC had a greater advantage over other broadcasters to do this, since it had greater resources at its disposal."* [13]

However, they also agreed that TBC was also far better at local programming and broadcasting locally relevant content to audiences across all regions. TBC Taifa and TBC FM are equally popular nationally. *(For demographic breakdown of audience, see Appendix 1.)*

[10] BBC AMDI, Pg 30

[11] Official Website for Radio Free Africa; see here: http://radiofreeafricatz.com/about/

[12] African Media Barometer 2010, Pg 37

[13] Ibid

Radio One is a private commercial station owned by IPP Media and broadcasting in Kiswahili. It enjoys higher preference among those with Tier 4 income levels *(For demographic breakdown of audience, see Appendix 1.)*

Radio Maria is a religious radio station run by The World Family of Radio Maria, a non-governmental organization (NGO) which was legally established in 1998. They have radio stations all over the world including African nations such as Zambia, Mozambique, Uganda, Kenya, etc.[14] *(For demographic breakdown of audience, see Appendix 1.)*

Clouds FM is an entertainment-oriented radio station which reaches all the major cities and towns in Tanzania. Most of its shows are in Kiswahili and the rest are in English.[15] They have political news updates at the top of every hour and business news once a day. Due to its reach in cities and surrounding suburbs, its audiences are also more urban. They also tend to be disproportionately Tier 4 income-earning respondents *(For demographic breakdown of audience, see Appendix 1.)*

Language Diversity in Radio

Along with owning popular Kiswahili radio stations that reach a national audience, each of the top companies also owns channels that broadcast in English. For instance, stations such as East Africa Radio, Kiss FM and Choice FM all broadcast in English, and are all part of holding companies. East Africa Radio belongs to IPP Media (which owns Radio One), Kiss FM belongs to Sahara Communication (which owns RFA) and Choice FM has the same owners as Clouds FM. Most of these stations cater to youth and feature entertainment programming.

Although most Tanzanians speak and understand Kiswahili and a quarter of them also speak English, Tanzania has close to 120 ethnic groups, each of which has its own language. Although Kiswahili and English are the languages of the political, social and educational sphere, local media must take on the task of preserving regional languages.

This is not the case, however, and thus a crucial information gap exists due to the **lack of radio stations in regional languages**. Most stations broadcast in Kiswahili and English, and those who barely speak these two languages face obstacles to receiving information. AfroBarometer's 2010 study reports that Radio Orkonerei in Manyara, which broadcasts for the Maasai people in their indigenous language, was noted as one of the few media outlets using a local language. [16] Besides this notable exception, few sources of news and information exist in regional languages.

[14] Official Website for Radio Maria
http://www.radiomaria.org/index.asp?LNG=ENG&MNU=01&SUB=00&SLC=MNU&PRG=NONE

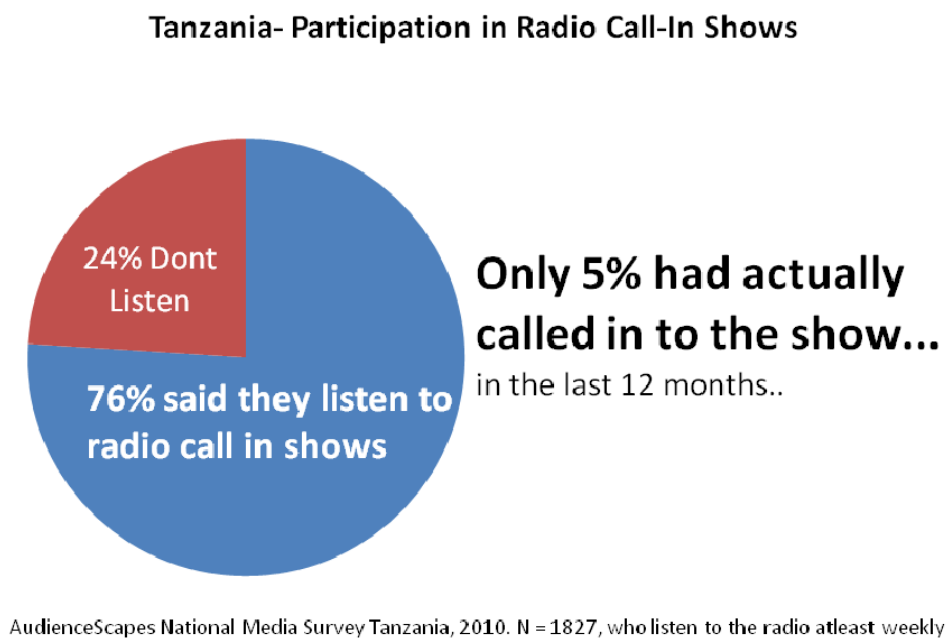
[15] Official Website for Clouds FM http://www.cloudsfm.co.tz/pdf_docs/CLOUDS_Fm_Station_Profile.pdf

[16] Afrobarometer 2010, Pg 13

Participation in Radio Call-in Shows

Previous studies in Tanzania[17] have reported that radio in Tanzania has become more interactive over time, with more radio call-in shows to encourage participation. Unfortunately, our survey shows that while respondents may listen to these call-in shows, radio is seen more as a medium for passive entertainment than as a forum for voicing one's opinion. As Figure 12 shows, although 76 percent of radio listeners listen to radio call-in shows, only 5 percent had actually called in to one of these shows in the last 12 months.

Figure 12

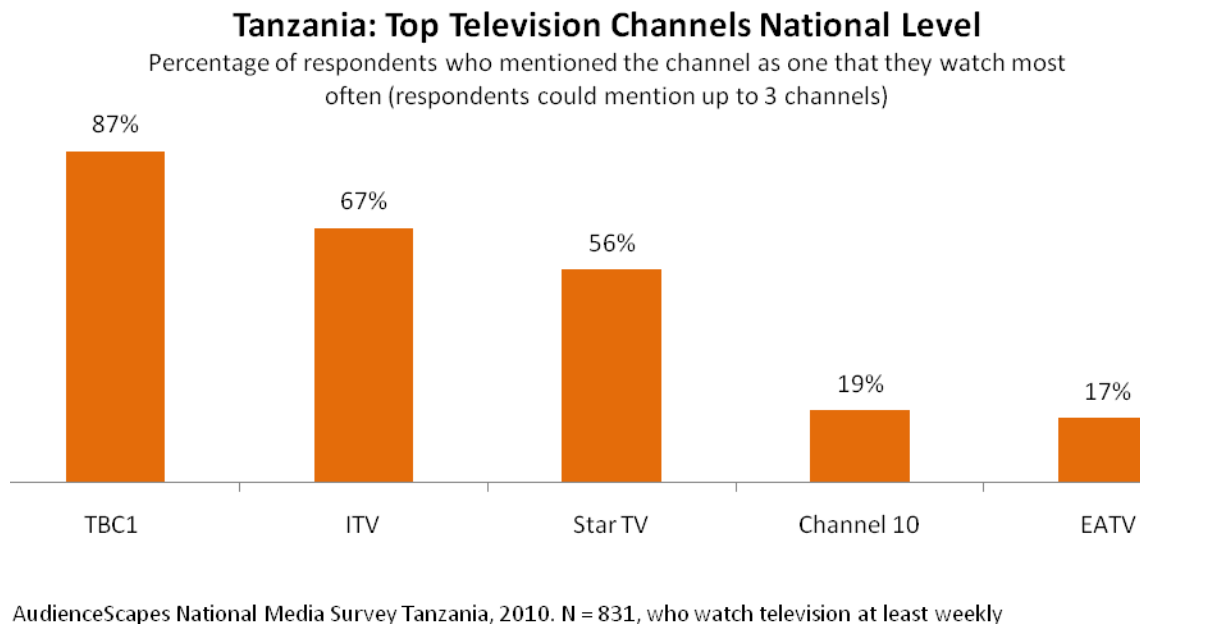


2.2 Television

Television viewing has yet to become a popular and established medium all across Tanzania. Among those who do watch television, viewers are disproportionately urban and have high incomes *(see Chapter 1 for more details).*

[17] BBC AMDI, Pg 17

Figure 13



Three stations have large enough reach to be considered national stations (see Figure 13). These are state-run TBC 1 (also known as Televisheni ya Taifa (TVT)), Independent Television (ITV) and Star TV. All these channels are free to watch.[18] Less popular are Channel 10 and East Africa Television (EATV).

The BBC reports that there are currently 27 television channels, with the majority broadcasting only at the district level, acting as national broadcast relays. Cable television is available in major cities, but is still very rare.

TBC 1 went on air only in 2001, and attracts audiences from all income groups, age groups, gender and locations *(for a demographic breakdown of audience, see Appendix 1).*

Independent Television (ITV) broadcasts in both Kiswahili and English and is owned by the IPP media group. The ITV audience is more urban, and it is watched in a higher proportion by women (*for a demographic breakdown of audience, see Appendix 1*). A look at its schedule shows a combination of movies and television shows interspersed with news in English from Al Jazeera, BBC, CNN and the South African Broadcasting Corporation (SABC).

Overall, the BBC AMDI report claims that Tanzanian TV broadcasts little original content, and borrows heavily from foreign broadcasters.[19] Tanzanian TV has had some success in local programming recently, though, mainly due to the local soap operas and the growth of the music industry in Tanzania.

[18] BBC AMDI, Pg 18

[19] BBC AMDI, 2005, Pg 19

Star TV began broadcasting in 2000 from Mwanza. It expanded to Arusha and Dar es Salaam in 2001, but synchronized TV programming in Mwanza, Arusha and Dar es Salaam did not take place until 2003. Star TV audiences are more rural (*for a demographic breakdown of audience, see Appendix 1*). The satellite signal is free, thus making Star TV programming accessible to an even bigger audience – those who receive TV from cable TV operators or via direct to home satellite equipment.

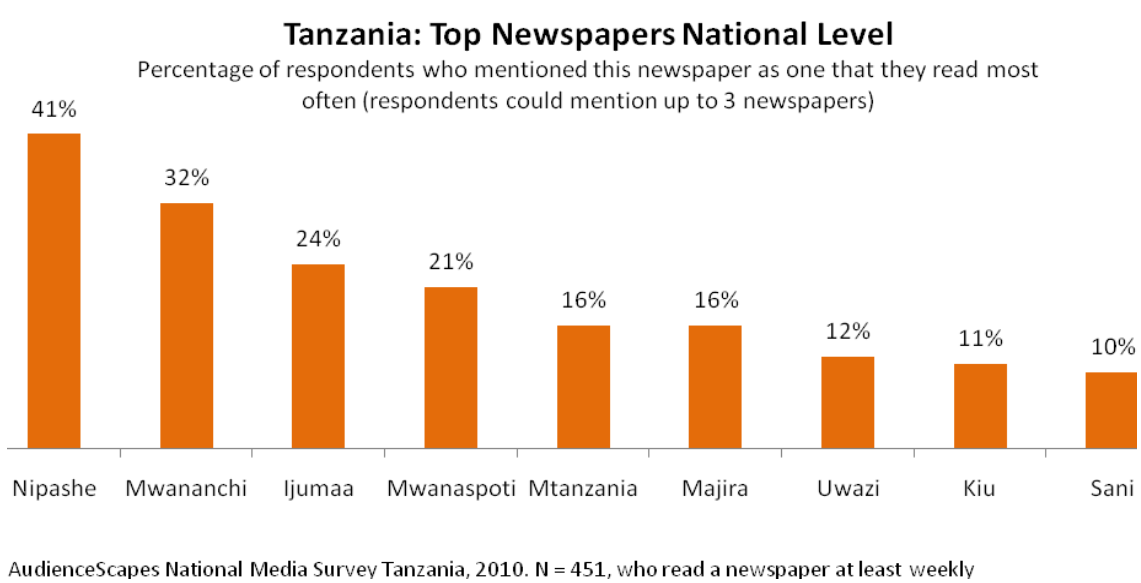
East African Television (EATV) is also owned by IPP media. It seems to be more popular among younger audiences and those who have higher incomes *(for a demographic breakdown of audience, see Appendix1).*

2.3 Newspapers

Tanzania's newspapers were nationalized until the resignation of President Julius Nyerere in 1985. The private press has grown tremendously since the introduction of multi-party democracy in 1992; by 2006, there were more than 537 registered newspapers, including 12 active dailies and more than 50 weeklies.[20]

Most of the major newspapers in Tanzania are published in Kiswahili, so readership is not affected by those who don't read in English, as happens in countries such as Zambia. The major problem with newspaper readership is circulation (see more in non-users section). Circulation is mostly limited to the urban areas in the key regions – *Arusha*, *Moshi*, *Mbeya*, *Zanzibar* and *Mwanza*. The most widely read newspapers are printed and distributed from Dar es Salaam, although there are some regional newspapers in some parts of Tanzania. *(For a demographic breakdown of readers, see Appendix 1.)*

Figure 14

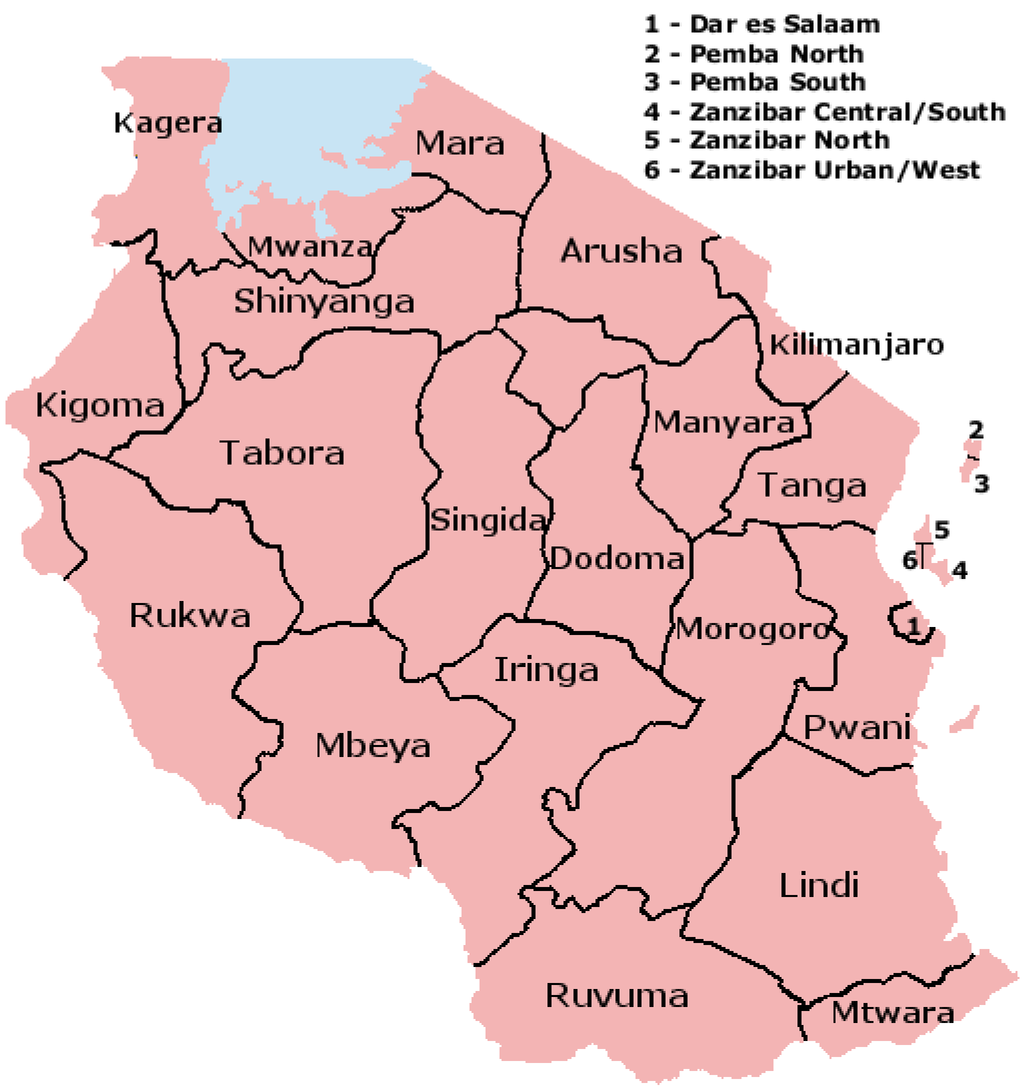


[20] Tanzania." U.S. State Department: Bureau of Democracy, Human Rights, and Labor. 2009. Washington, D.C. 13 May 2009 http://www.state.gov/g/drl/rls/hrrpt/2005/61596.htm

Chapter 3: Regional Breakdown

A Guide to Communicating Within Each Region in Tanzania

For development practitioners planning communication strategies in specific regions within Tanzania, it might be more effective to focus on the media-information environment in that specific region. Sometimes popular national stations, channels and newspapers may be effective in reaching a broad swath of Tanzanians, but not so effective in reaching deep into a specific region. For more targeted strategies, we present a region-by-region breakdown of the top news and information sources in Tanzania.



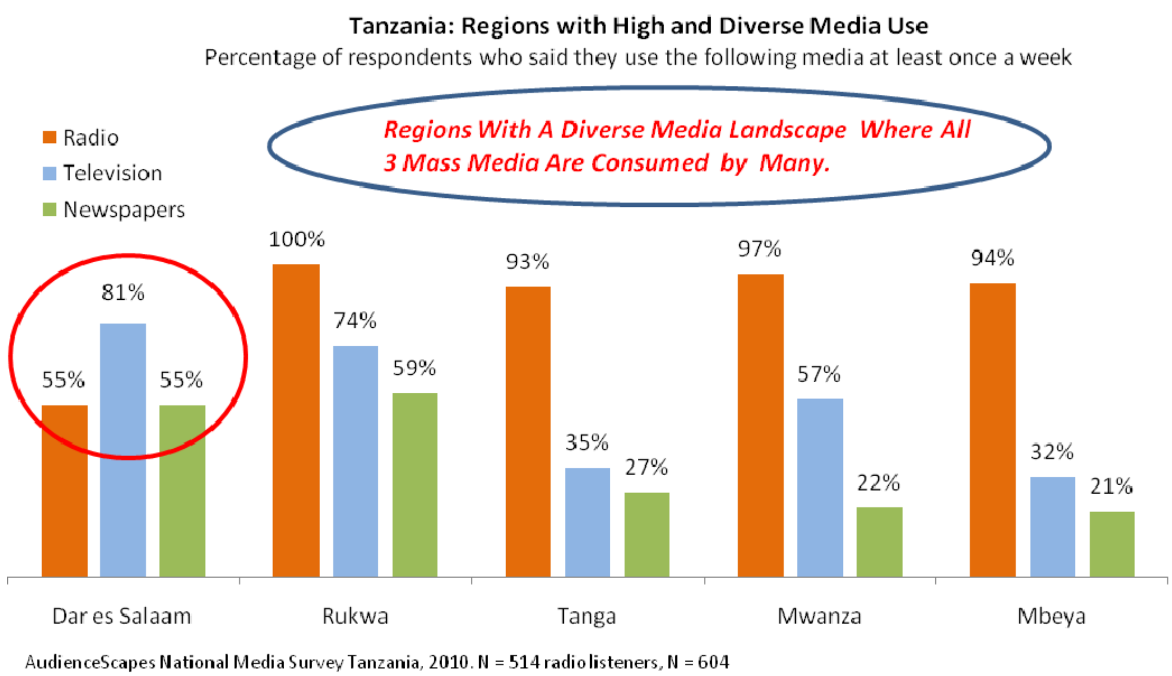
Tanzania is divided into 26 regions (mkoa), 21 on the mainland and 5 in Zanzibar: Arusha, Dar es Salaam, Dodoma, Iringa, Kagera, Kigoma, Kilimanjaro, Lindi, Manyara, Mara, Mbeya, Morogoro, Mtwara, Mwanza, Pwani, Rukwa, Ruvuma , Shinyanga, Singida, Tabora, Tanga, Zanzibar (Zanzibar is further divided into Pemba North, Pemba South, Zanzibar Central/South, Zanzibar North, Zanzibar Urban/West, but for this survey all were taken together, making a total of 22 regions covered).

A regional breakdown may also be useful to highlight community radio stations that are popular in their respective regions, but fail to show up on our nationally popular ratings. Most of these are funded by nonprofit organizations. Community broadcasting is expanding, however, as reported by the 2010 AfroBarometer study, which found outlets supported through private and institutional (religious) ownership. Also, some community radio stations have been established by politicians to boost their popularity in their constituencies. [21] **In some instances, these community radio stations (or newspapers or television stations) might be more effective in reaching target audiences within a region.**

We divided all 22 regions into three groupings: *Regions with High and Diverse Media Use*, *Regions with Moderate Broadcast Media Use*; *Scarce Newspaper Readership* and *Regions where Radio Use Dominates*. We have tracked the percentage of respondents who mentioned a media outlet (radio, television or newspaper) as one of the three they listen/watch/read most often for each region. Every outlet with more than 15 percent of respondents mentioning it is included.

Regions with High and Diverse Media Use: Typically in these regions, radio use is very high and near universal; but television and newspaper use are also higher than average (see Figure 15). This means Tanzanians in this region have a wide variety of news and information available. These also tend to be regions where the majority of respondents have Tier 2 and 3 incomes. There are some minor exceptions such as Tanga, where newspaper readership is above average, but television use is below average. Generally speaking, however, these are regions with moderate to high use of all three media.

Figure 15



[21] African Media Barometer 2010 , Pg 39

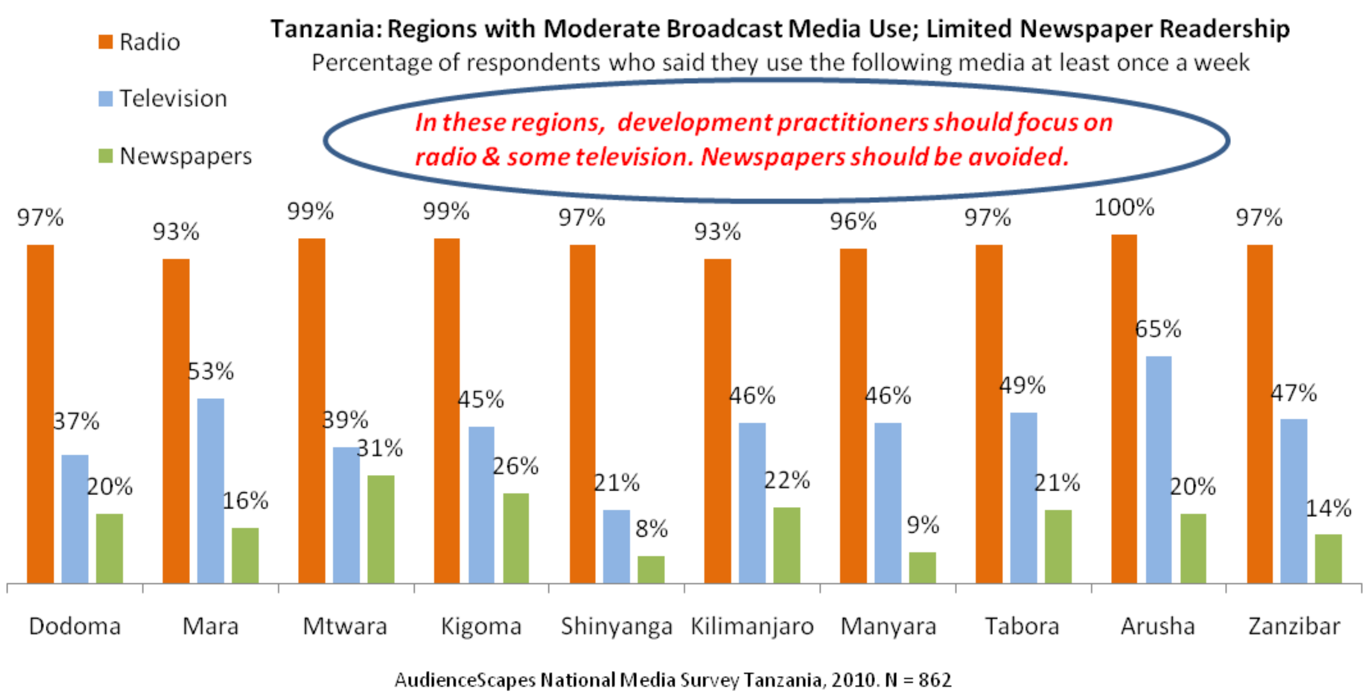
In regions such as Dar es Salaam, where many stations generate their broadcasts, no single station dominates the radio scene completely. In terms of television (which a larger proportion of residents watch here), ITV and TBC 1 are most popular. A wide variety of newspapers, in addition to the nationally popular ones, are also read.

(For details on media use in these regions, see Appendix 2)

Regions with Moderate Broadcast Media Use and Scarce Newspaper Readership: These are regions with moderate to below average television use and very scarce newspaper readership; although radio use remains high. There is some variation in this grouping – in affluent regions such as Arusha, television use is 65 percent, much higher than the national average, while newspaper use is closer to average; while regions such as Shinyanga have particularly low television and newspaper use. But neither had a sample size of newspaper readers large enough to present more details on newspaper readership.

Generally speaking, these are regions where, in addition to radio, television can be used in some cases to target messages, but newspaper readership is low enough to not be recommended for a communication strategy. *(For details on media use in these regions, see Appendix 2.)*

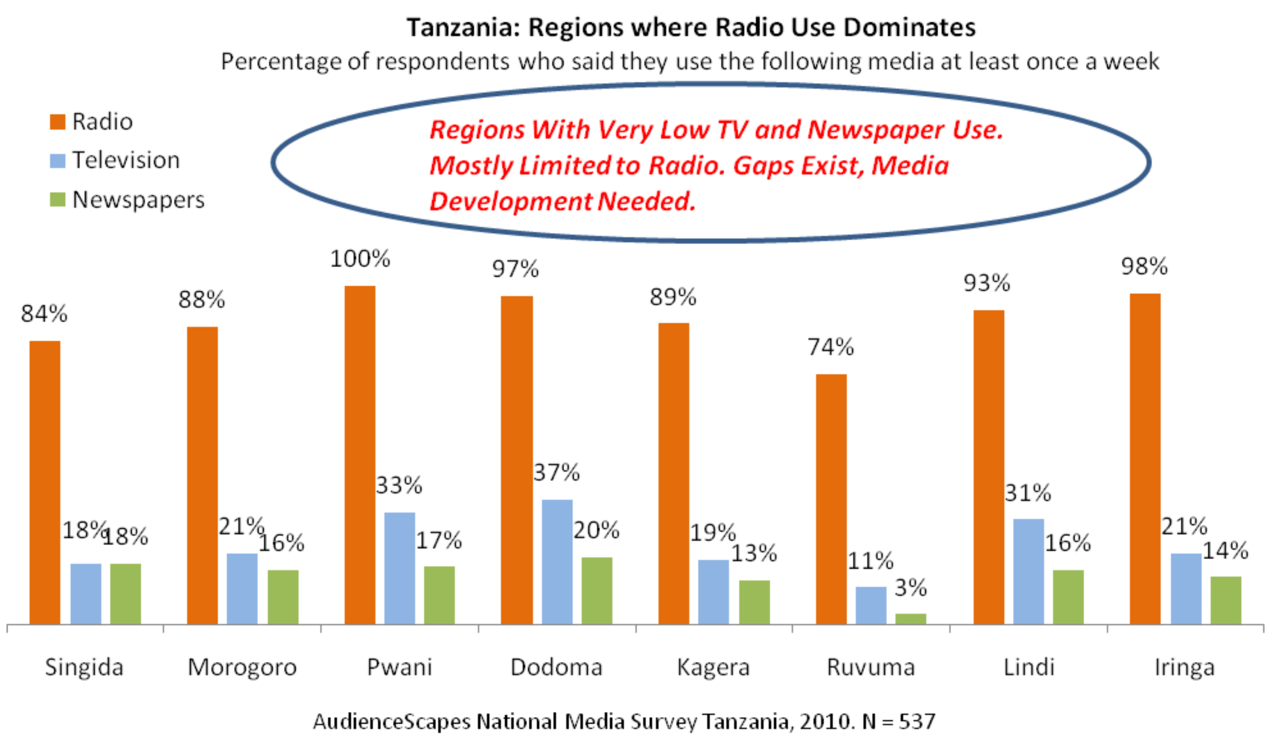
Figure 16



Identifying Gaps: Regions with Few Media Users and Limited Media Diversity

These regions have a lower than average proportion of television viewers and newspapers readers. Regions such as Pwani and Dodoma have somewhat greater proportion of television viewers, but the sample size was still too small to provide any more details on television viewership. In these regions, communication strategies should focus on dissemination via radio.

Figure 17



In particular, a southeastern information gap emerges: **The six adjacent regions of Singida, Iringa, Ruvuma, Morogoro, Lindi and Pwani (see map above) all have a particularly low concentration of television or newspaper users.**

These adjacent regions have fewer concentrations of media users, and their choice of available stations is limited. When compared with those residing in regions with high and diverse media use, these regions emerge as those most needing greater media development strategies. Media development organizations in Tanzania must focus on these regions. *(For details on media use in these regions, see Appendix 2.)*

Chapter 4: News and Information Access and Sharing

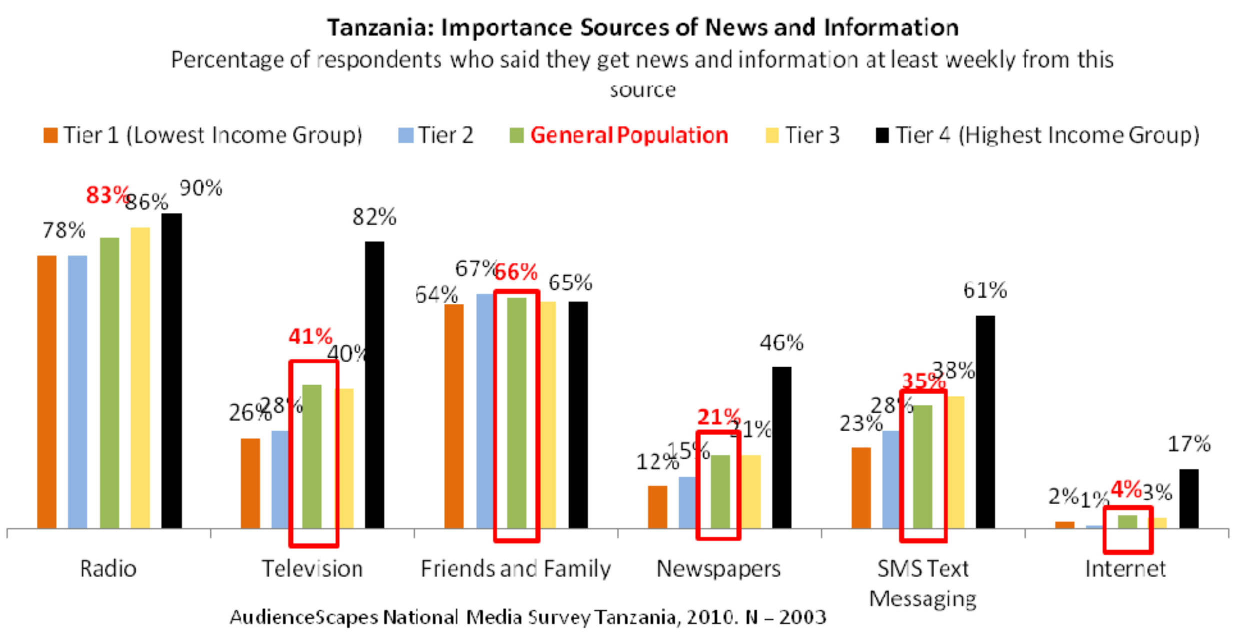
In addition to regular use and access to media, we are also interested in what people self-report as the major sources of information that is important to them. With a better view of not only how much access to information Tanzanians have, but also what information sources they rely on and trust the most, development practitioners can craft effective strategies that are better suited to the local context of their beneficiaries.

Throughout Africa, the rise in access to mobile phones also represents a potential boost for access to broadcast media – either by people listening to the radio on their cell phones or by sharing information heard on mass media throughout their personal networks via SMS. Both these forms of information access/sharing remain nascent and underdeveloped in Tanzania, despite the fact that 62 percent of respondents said they have household access to a mobile phone**.** This method of media access creates the potential for greater information sharing, especially among those in rural and impoverished locations, who traditionally have had more limited access to anything besides a radio set. Media development professionals must focus on tapping into this mobile media potential and increasing trust in information received through it by Tanzanians.

4.1 Access to News Sources

Eighty-three percent of Tanzanians said they get news and information from radio, making it the leader of both media and non-media sources. Radio is the top source for every age group and income group we tracked, as well as both males and females, and rural and urban dwellers. Friends and family are the other major source of information from which Tanzanians across all demographic groups get their information.

Figure 18



As incomes rise, Tanzanians' range of information sources expands. We compared Tanzanians' weekly sources of information and found that some income disparities exist. Among the four income tiers (with Tier 1 being the lowest and Tier 4 the highest), we found that Tanzanians with high incomes access information regularly from a wider variety of sources than their counterparts with lower incomes (see Figure 18). For example, the proportion of Tanzanians who get information regularly from television was only 40 percent for Tier 3 income respondents and 82 percent for Tier 4 respondents.

Access to technology, particularly mobile phones, provides higher-income Tanzanians with a wider array of information sources. Eighty-seven percent of Tier 4 respondents said they have household access to a mobile phone, and 61 percent of them said they regularly receive information via SMS text messages. In addition, those in urban areas are almost twice as likely as their rural counterparts (51 percent versus 29 percent) to use SMS as a weekly source of information.[22]

Newspapers and SMS messages – both of which, in principle, require a level of literacy – rank at the bottom of sources of news and information used regularly by Tanzanians. However, it is worth noting that **SMS messages outrank newspapers as a source**, even though newspapers have been available for a much longer period of time than SMS.

The data underscore the rapidly growing importance of mobile-based information for Tanzanians, as well as the potential mobile phones present to reach communities that do not have ready access to print or other types of media.

SMS Texting: A Potential, Yet Not Trusted Tool

Sixty-two percent of respondents said they have household access to a mobile phone, but only 35 percent said they use SMS text for news and information weekly (see Figure 19). The fairly widespread access to a mobile phone suggests great potential for increased information targeting via SMS.

[22] Urban Mobile Phone Access – 82 percent, Rural Mobile Phone Access – 54 percent

Figure 19

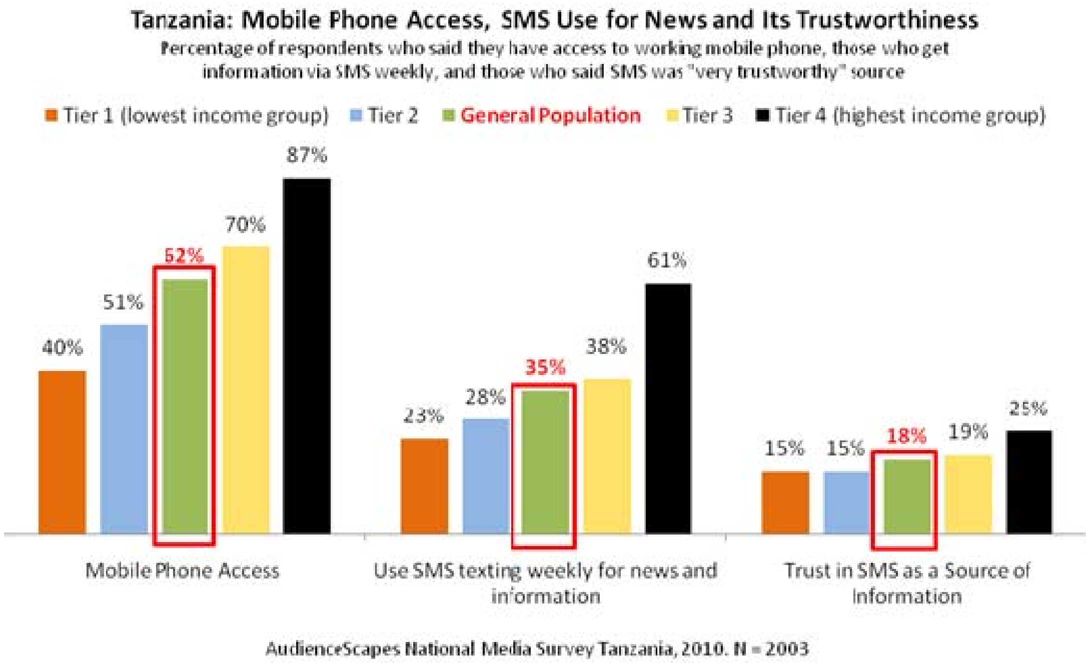


Figure 19 also shows that very few Tanzanians trust SMS as a credible source of information, implying that the lack of SMS use as an information source may to some extent be a trust issue.

In addition, even though 19 percent of all Tanzanians were receiving SMS news updates from their mobile phone operators, only 1 percent had ever forwarded this received information through SMS to their friends or family.

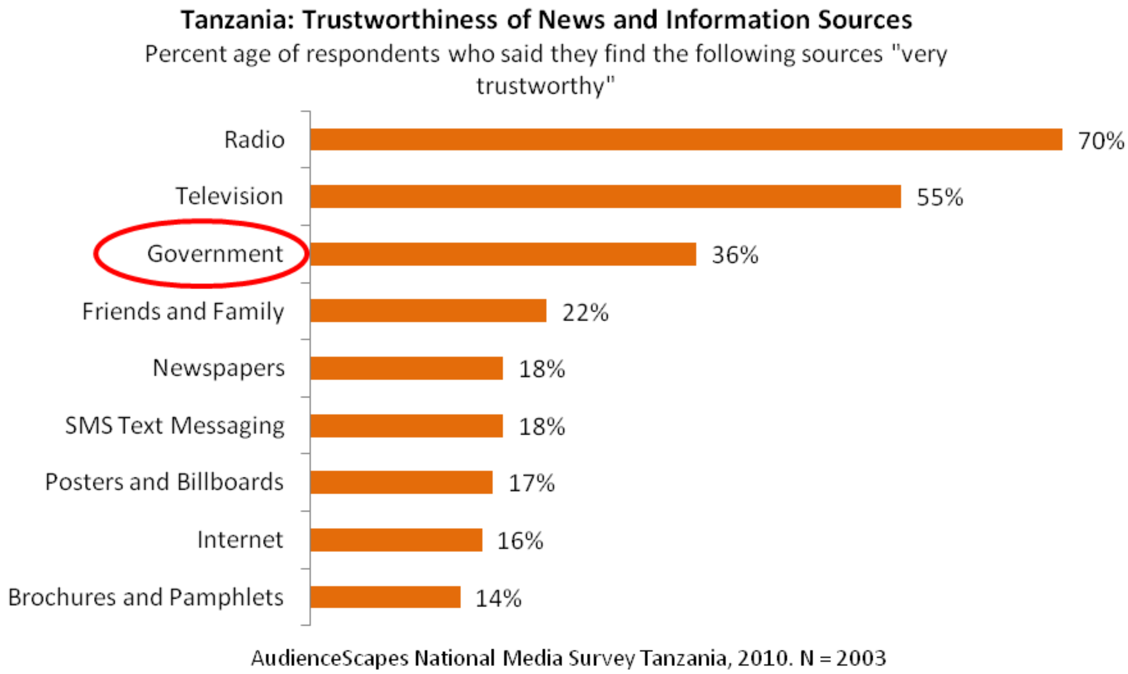
Use and Trust Do Not Always Run Parallel

While a given information source may be widely used, it does not mean that the source is highly trusted, and hence widely heeded by those receiving information from it. For example, 66 percent of Tanzanians said they get information regularly from friends and family, but only a third of this group said they completely trust friends and family as a source. Conversely, more people trust television as a source than those who said they regularly got information from it. About the same proportion of people who got information from newspapers also trusted that information.

Among all information sources**, radio, television and (somewhat surprisingly) government are the most highly trusted sources of information for Tanzanians** (see Figure 20).

Note that the internet and SMS-text messaging garner about the same proportion of Tanzanians rating them as “very trustworthy” sources. However, internet use rates are substantially lower than SMS use rates. Thus, although the internet is not widely used, it is held in relatively high esteem.

Figure 20



4.2 Sharing News and Information

In order to determine how information is shared between Tanzanians, the AudienceScapes survey asked these questions: "How often do you discuss news and information with other people in your community?" and "How often would you say people ask you for your opinion or advice on major news stories?"

The survey results show that **close to 60 percent of Tanzanians discuss news and information with others in their community at least weekly, and 44 percent are asked for their opinion on major news stories weekly (Figures 21-22).**

Figure 21

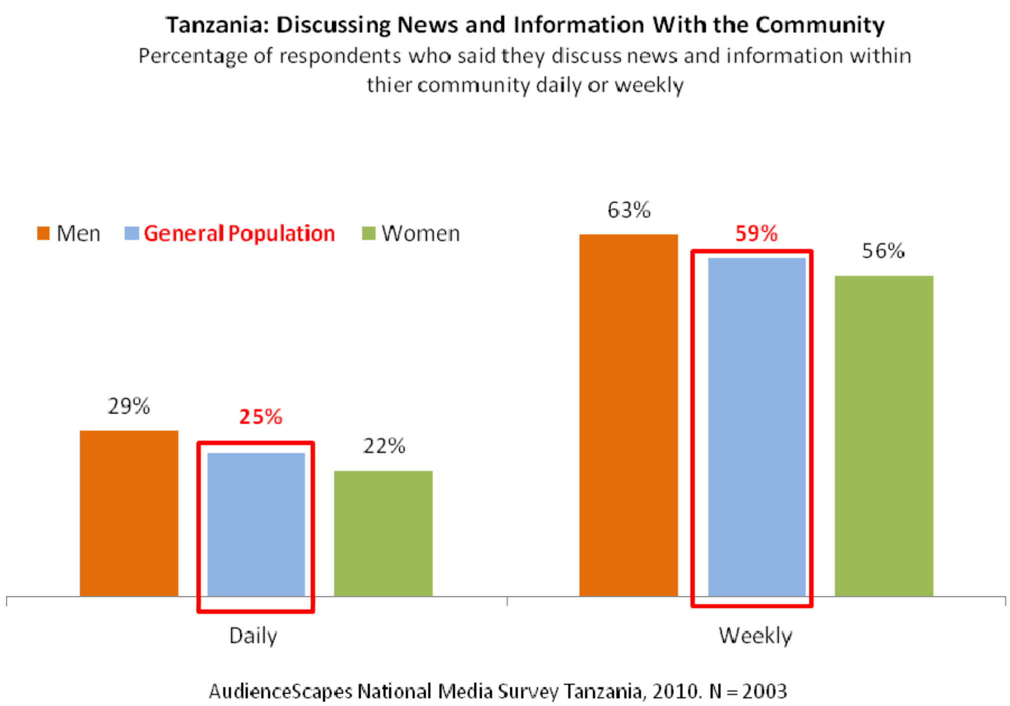
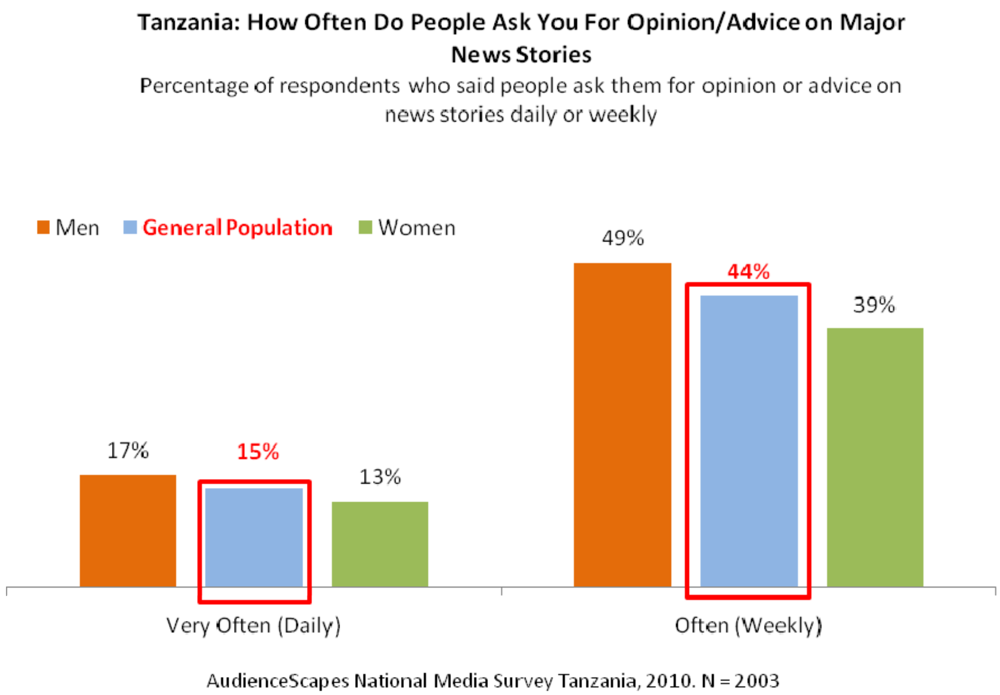


Figure 22



In the AudienceScapes framework, we use this information to define opinion leaders – those to whom others turn most for information and perspectives on various issues. Development strategists sometimes focus communication and information-sharing efforts on influential members of a group, under the assumption that such people (opinion leaders) will have a disproportionate impact on the views and attitudes of the group as a whole.

In the past, we have noticed that opinion leaders tend to be demographically distinct: for instance, they tend to be more male than female and older than average. But respondents in Tanzania who discuss news and give advice (daily or weekly) were not very distinct demographically; they tend to mirror the general population in terms of distribution across regions, ages and tiers of income, gender and location (urban or rural).

Rather than relying on opinion leaders to disseminate information, development practitioners may have more success in influencing behavior by better understanding Tanzania's information-sharing environment.

The majority of Tanzanians said they get information from the radio and from their own friends and family. They don't trust their friends and family, however, as much as they trust radio and television, and to some extent the government. Access to television is low, although radio is spread universally, and commands reach and access that is unparalleled by any other form of media.

Tanzanians also have high access to mobile phones, but haven't become accustomed to the technology to trust it greatly (see Figures 19-20). **Tapping into the unused potential of SMS, NGOs can ensure more effective campaigns by combining mass media with personal communication and outreach.** For those working in the field of media development, this untapped potential of mobile phones also presents an opportunity to expand information access.

After studying information dissemination across Africa, Prof. Steven Livingston from George Washington University's Elliot School of International Affairs and the School of Media and Public Affairs observed the importance of trusted social networks in sharing news heard from a mass media source. He suggests that

> "*….combining mass media with interpersonal communication is the most effective way of transferring effective messages -- and generating behavioral change. While only a fraction of the target population may hear the original message* [on the radio]*, if the content is relevant, a wave of others will subsequently hear the message via personal networks.*"[23]

In order to maximize dissemination of information, development practitioners should combine radio broadcasts with interpersonal communication among established word-of-mouth networks (friends and family) through SMS.

[23] For more information on Prof Livingston's work see: http://africacenter.org/2011/02/africas-evolving-infosystems-a-pathway-to-stability-and-development/

For instance, radio broadcasts could be combined with contests that encourage listeners to SMS their friends and family to listen in as well. Weekly winners could be those who recommended the show the most. Radio broadcasts could also be accompanied by contests that encourage listeners to talk to friends and family members and suggest strategies back to the show.

This approach takes into consideration the following: Tanzanians have high access to (radio), they regularly receive information from their friends and family, and they have high access to mobile phones, which they still don't use effectively for sharing information.

If information broadcast on the radio is then further disseminated via SMS to friends and family, it has the potential to reach more people and lends the information transmitted more credibility because it is conveyed by a trusted social contact.

As incomes rise, Tanzanians' range of information sources expands. To reach elites in Tanzania, especially those at the highest income tier, a combination of television broadcasts and mobile phones are possible avenues.

APPENDIX 1: Media Outlet Audiences

The audience for each popular media outlet is analyzed by their demographic differences.

RADIO

TBC Taifa (State Radio) Listenership by Demographics — Figures represent percentages of those who named this station as one of three they listened to most often			
By Age Groups		**By Income Groups**	
15-24	29%	Tier 1 (lowest)	38%
25-34	30%	Tier 2	42%
35-44	40%	Tier 3	33%
45+	45%	Tier 4 (highest)	25%
By Gender		**By Location**	
Men	39%	Urban	26%
Women	30%	Rural	38%
AudienceScapes National Media Survey Tanzania 2010. N = 1827 weekly radio listeners			

TBC FM (State Radio) Listenership by Demographics — Figures represent percentages of those who named this station as one of three they listened to most often			
By Age Groups		**By Income Groups**	
15-24	34%	Tier 1 (lowest)	33%
25-34	33%	Tier 2	33%
35-44	34%	Tier 3	36%
45+	35%	Tier 4 (highest)	30%
By Gender		**By Location**	
Men	33%	Urban	36%
Women	34%	Rural	33%
AudienceScapes National Media Survey Tanzania 2010. N = 1827 weekly radio listeners			

Radio Free Africa- Listenership by Demographics — Figures represent percentages of those who named this station as one of three they listened to most often			
By Age Groups		**By Income Groups**	
15-24	57%	Tier 1 (lowest)	54%
25-34	56%	Tier 2	54%
35-44	52%	Tier 3	55%
45+	49%	Tier 4 (highest)	48%
By Gender		**By Location**	
Men	64%	Urban	42%
Women	44%	Rural	58%
AudienceScapes National Media Survey Tanzania 2010. N = 1413 weekly radio listeners			

Radio One Listenership by Demographics — Figures represent percentages of those who named this station as one of three they listened to most often			
By Age Groups		**By Income Groups**	
15-24	22%	Tier 1 (lowest)	20%
25-34	30%	Tier 2	21%
35-44	24%	Tier 3	25%
45+	24%	Tier 4 (highest)	37%
By Gender		**By Location**	
Men	26%	Urban	28%
Women	24%	Rural	23%
AudienceScapes National Media Survey Tanzania 2010. N = 1827 weekly radio listeners			

Radio Maria
Listenership by Demographics
Figures represent percentages of those who named this station as one of three they listened to most often

By Age Groups		By Income Groups	
15-24	14%	Tier 1 (lowest)	13%
25-34	8%	Tier 2	13%
35-44	12%	Tier 3	12%
45+	10%	Tier 4 (highest)	6%
By Gender		**By Location**	
Men	12%	Urban	6%
Women	11%	Rural	13%

AudienceScapes National Media Survey Tanzania 2010. N = 1827 weekly radio listeners

Clouds FM
Listenership by Demographics
Figures represent percentages of those who named this station as one of three they listened to most often

By Age Groups		By Income Groups	
15-24	14%	Tier 1 (lowest)	5%
25-34	12%	Tier 2	7%
35-44	11%	Tier 3	10%
45+	4%	Tier 4 (highest)	27%
By Gender		**By Location**	
Men	12%	Urban	22%
Women	10%	Rural	7%

AudienceScapes National Media Survey Tanzania 2010. N = 1827 weekly radio listeners

TELEVISION

TBC 1
Viewership By Demographics
Figures represent percentages of those who named this channel as one of three they viewed most often

By Age Groups		By Income Groups	
15-24	88%	Tier 1 (lowest)	87%
25-34	82%	Tier 2	85%
35-44	92%	Tier 3	87%
45+	87%	Tier 4 (highest)	87%
By Gender		**By Location**	
Men	90%	Urban	85%
Women	83%	Rural	88%

AudienceScapes National Media Survey Tanzania 2010. N = 831 weekly television viewers

ITV
Viewership By Demographics
Figures represent percentages of those who named this channel as one of three they viewed most often

By Age Groups		By Income Groups	
15-24	64%	Tier 1 (lowest)	73%
25-34	75%	Tier 2	60%
35-44	58%	Tier 3	68%
45+	72%	Tier 4 (highest)	69%
By Gender		**By Location**	
Men	61%	Urban	76%
Women	74%	Rural	58%

AudienceScapes National Media Survey Tanzania 2010. N= 831 weekly television viewers

Star TV
Viewership By Demographics
Figures represent percentages of those who named this channel as one of three they viewed most often

By Age Groups		By Income Groups	
15-24	57%	Tier 1 (lowest)	45%
25-34	59%	Tier 2	59%
35-44	58%	Tier 3	57%
45+	49%	Tier 4 (highest)	53%
By Gender		**By Location**	
Men	58%	Urban	49%
Women	54%	Rural	62%

AudienceScapes National Media Survey Tanzania 2010. N= 831 weekly television viewers

Channel 10
Viewership By Demographics
Figures represent percentages of those who named this channel as one of three they viewed most often

By Age Groups		By Income Groups	
15-24	15%	Tier 1 (lowest)	11%
25-34	21%	Tier 2	13%
35-44	21%	Tier 3	21%
45+	25%	Tier 4 (highest)	24%
By Gender		**By Location**	
Men	19%	Urban	24%
Women	20%	Rural	14%

AudienceScapes National Media Survey Tanzania 2010. N= 831 weekly television viewers

EATV
Viewership By Demographics
Figures represent percentages of those who named this channel as one of three they viewed most often

By Age Groups		By Income Groups	
15-24	23%	Tier 1 (lowest)	16%
25-34	17%	Tier 2	15%
35-44	13%	Tier 3	15%
45+	9%	Tier 4 (highest)	24%
By Gender		**By Location**	
Men	17%	Urban	19%
Women	18%	Rural	16%

AudienceScapes National Media Survey Tanzania 2010. N= 831 weekly television viewers

NEWSPAPERS

Nipashe-Readership By Demographics
Figures represent percentages of those who named this newspaper as one of three they read most often

By Age Groups		By Income Groups	
15-24	41%	Tier 1 (lowest)	32%
25-34	37%	Tier 2	43%
35-44	42%	Tier 3	46%
45+	47%	Tier 4 (highest)	34%
By Gender		**By Location**	
Men	38%	Urban	44%
Women	46%	Rural	37%

AudienceScapes National Media Survey Tanzania 2010. N = 451 weekly newspaper readers

Mwananchi-Readership By Demographics
Figures represent percentages of those who named this newspaper as one of three they read most often

By Age Groups		By Income Groups	
15-24	25%	Tier 1 (lowest)	32%
25-34	31%	Tier 2	28%
35-44	43%	Tier 3	31%
45+	39%	Tier 4 (highest)	41%
By Gender		**By Location**	
Men	35%	Urban	34%
Women	28%	Rural	28%

AudienceScapes National Media Survey Tanzania 2010. N = 451 weekly newspaper readers

Ijumaa- Readership By Demographics
Figures represent percentages of those who named this newspaper as one of three they read most often

By Age Groups		By Income Groups	
15-24	34%	Tier 1 (lowest)	18%
25-34	22%	Tier 2	29%
35-44	10%	Tier 3	22%
45+	14%	Tier 4 (highest)	22%
By Gender		**By Location**	
Men	21%	Urban	26%
Women	27%	Rural	20%

AudienceScapes National Media Survey Tanzania 2010. N = 451 weekly newspaper readers

Mwanaspoti-Readership By Demographics
Figures represent percentages of those who named this newspaper as one of three they read most often

By Age Groups		By Income Groups	
15-24	24%	Tier 1 (lowest)	17%
25-34	23%	Tier 2	16%
35-44	14%	Tier 3	19%
45+	17%	Tier 4 (highest)	27%
By Gender		**By Location**	
Men	29%	Urban	21%
Women	10%	Rural	20%

AudienceScapes National Media Survey Tanzania 2010. N = 451 weekly newspaper readers

Majira-Readership By Demographics
Figures represent percentages of those who named this newspaper as one of three they read most often

By Age Groups		By Income Groups	
15-24	15%	**Tier 1 (lowest)**	9%
25-34	13%	**Tier 2**	15%
35-44	19%	**Tier 3**	20%
45+	11%	**Tier 4 (highest)**	11%
By Gender		**By Location**	
Men	15%	**Urban**	16%
Women	16%	**Rural**	15%

AudienceScapes National Media Survey Tanzania 2010.
N = 451 weekly newspaper readers

Mtanzania- Readership By Demographics
Figures represent percentages of those who named this newspaper as one of three they read most often

By Age Groups		By Income Groups	
15-24	12%	**Tier 1 (lowest)**	17%
25-34	21%	**Tier 2**	19%
35-44	18%	**Tier 3**	17%
45+	16%	**Tier 4 (highest)**	12%
By Gender		**By Location**	
Men	15%	**Urban**	13%
Women	17%	**Rural**	20%

AudienceScapes National Media Survey Tanzania 2010.
N = 451 weekly newspaper readers

Appendix II: Popular Media Outlets by Region

Regions with High and Diverse Media Use

Dar es Salaam Profile		
Radio (n= 86 weekly radio listeners)	**Television** (n = 126 weekly TV viewers)	**Newspapers** (n = 86 weekly readers)
Radio One – 40%	ITV – 89%	Nipashe – 47%
Times Radio – 34%	TBC 1 – 76%	Mtanzania – 46%
Radio Uhuru – 30%	Star TV – 33%	Mwananchi – 34%
Cloud FM- 28%	Channel 10 – 31%	Ijumaa – 28%
TBC FM- 27%	EATV – 23%	Alasiri – 22%
Radio Free Africa – 20%		Kiu – 19%
TBC Taifa FM – 19%		Mwanaspoti – 18%
		Uwazi – 17%
		Daily News – 15%

Rukwa Profile		
Radio (n= 67 weekly radio listeners)	**Television** (n = 46 weekly TV viewers)	**Newspapers (59%)** (n = 37 weekly readers)
TBC FM – 78%	TBC 1 – 98%	Nipashe – 71%
TBC Taifa – 77%	ITV – 63%	Ijumaa – 44%
Radio Free Asia – 49%	Star TV – 44%	Sani – 28%
Chechem FM – 29%		Mzalendo – 20%
		Uhuru – 17%

Tanga Profile		
Radio (n= 90 weekly radio listeners)	**Television** (n = 32 weekly TV viewers)	**Newspapers** (n = 25 weekly readers)
TBC FM – 60%	TBC FM – 88%	Nipashe – 56%
TBC Taifa- 31%	ITV FM – 59%	Mwananchi – 54%
Radio Free Asia – 28%	Star TV – 50%	Majiri – 42%
Radio One – 28%	Channel 10 – 35%	Ijumaa – 26%
Cloud FM – 15%	Tanga TV – 20%	Mwanaspoti – 23%
	EATV – 15%	Habari Leo – 15%

Mwanza Profile		
Radio **(n= 153 weekly radio listeners)**	**Television** **(n = 92 weekly TV viewers)**	**Newspapers** **(n = 37 weekly readers)**
Radio Free Asia – 67%	TBC 1 – 88%	Mwananchi – 39%
Radio One – 46%	Star TV – 74%	Majiri – 31%
TBC FM – 42%	ITV – 61%	Nipashe – 27%
TBC FM – 29%	EATV – 18%	Uwazi – 24%
	Channel 10 – 16%	Mwanaspoti – 22%
		Ijumaa & Mtanzania – 18%

Mbeya Profile		
Radio **(n= 118 weekly radio listeners)**	**Television** **(n = 45 weekly TV viewers)**	**Newspapers** **(n = 29 weekly readers)**
Radio Free Asia – 65%	TBC 1 – 98%	Nipashe – 35%
TBC Taifa – 50%	Star TV – 88%	Mwananchi - 33%
Bomba FM – 32%	ITV – 73%	Mwanaspoti - 30%
Cloud FM – 25%	EATV – 17%	Mtanzania – 27%
Mbeya FM – 24%		Sani – 23%
TBC FM – 18%		Kiu, Ijumaa, Uwazi, & Alasiri 15%
Mbeya Highland FM – 17%		

Regions with Moderate Broadcast Media Use; Scarce Newspaper Readership

Dodoma Profile	
Radio (n= 95 weekly radio listeners)	**Television** (n = 36 weekly TV viewers)
Radio Free Africa – 54%	TBC 1 – 89%
TBC FM – 54%	Star TV – 69%
Radio One - 47%	ITV – 58%
TBC Taifa – 23%	Channel 10 – 28%
Mwangaza Radio – 15%	EATV – 17%

Mara Profile	
Radio (n= 73 weekly radio listeners)	**Television** (n = 43 weekly TV viewers)
Radio Free Africa – 78%	TBC 1 – 95%
TBC FM – 56%	Star TV – 74%
Victory FM – 44%	ITV – 56%
Radio One – 27%	Channel 10 – 18%
TBC Taifa – 24%	
Cloud FM – 22%	
KBC Radio – 19%	

Mtwara Profile	
Radio (n= 69 weekly radio listeners)	**Television** (n = 26 weekly TV viewers)
TBC FM – 64%	TBC 1 – 81%
Radio Free Asia – 48%	Star TV – 62%
TBC Taifa – 35%	Channel 10 – 58%
Radio One – 20%	ITV – 50%
	EATV – 35%

Kigoma Profile	
Radio (n= 72 weekly radio listeners)	**Television** (n = 33 weekly TV viewers)
Radio Kwizera – 97%	TBC 1 – 100%
Radio Free Asia – 79%	Star TV – 82%
TBC Taifa – 53%	ITV – 67%

Zanzibar Profile	
Radio (n= 60 weekly radio listeners)	**Television** (n = 92 weekly TV viewers)
Radio Zanzibar – 60%	TBC 1 – 87%
Nuru FM – 38%	TVZ – 65%
Zanji FM – 36%	Star TV – 55%
Istikhama Radio – 22%	ITV – 47%

Arusha Profile	
Radio (n= 79 weekly radio listeners)	**Television** (n = 54 weekly TV viewers)
Radio One – 61%	TBC 1 – 86%
TBC Taifa – 42%	ITV – 84%
Radio Free Asia – 28%	Star TV – 51%
Cloud FM – 19%	
Sauti ya Injili – 18%	
TBC FM – 16%	

Manyara Profile	
Radio (n= 60 weekly radio listeners)	**Television** (n = 27 weekly TV viewers)
Radio Free Asia – 69%	TBC 1 – 94%
TBC FM – 48%	Star TV – 55%
Radio One – 40%	ITV – 52%
	EATV – 38%

Tabora Profile	
Radio (n= 95 weekly radio listeners)	**Television** (n = 47 weekly TV viewers)
Radio Free Asia – 87%	TBC 1 – 100%
TBC FM – 42%	ITV – 49%
Radio One – 40%	Star TV – 36%
Voice of Tabora – 38%	Channel 10 – 20%

Shinyanga Profile	
Radio (n= 150 weekly radio listeners)	**Television** (n = 32 weekly TV viewers)
Radio Free Asia – 83%	TBC 1 – 94%
TBC Taifa – 50%	Star TV – 84%
Radio Kahama – 29%	ITV – 68%
Sibuka FM – 27%	EATV – 17%
TBC FM – 26%	
Radio One – 23%	

Kilimanjaro Profile	
Radio (n= 81 weekly radio listeners)	Television (n = 44 weekly TV viewers)
Radio One – 63%	ITV – 80%
Kill Fm – 33%	TBC 1 – 67%
Sauti ya Injili – 28%	Star TV – 46%
Radio Free Asia – 24%	EATV – 29%
TBC FM – 19%	
TBC Taifa – 16%	

Regions where Radio Use Dominates

Kagera Profile
Radio (n= 99 weekly radio listeners)
Radio Free Asia – 58%
Fadeco Karagwe FM – 45%
TBC FM – 39%
TBC Taifa – 32%
Radio One – 20%
Radio Kwizera – 17%

Singida	Iringa	Morogoro
Radio (n= 54 weekly radio listeners)	Radio (n= 86 weekly radio listeners)	Radio (n= 98 weekly radio listeners)
Radio Free Africa – 73%	Ebony FM – 64%	Radio Abood – 44%
TBC FM – 60%	Radio Free Asia – 55%	TBC Taifa – 38%
Radio Maria – 33%	Country FM – 40%	Radio Free Africa – 34%
Radio One – 21%	TBC FM – 21%	Ukweli Radio – 30%
TBC Taifa – 15%	Furaha FM – 20%	Cloud FM - 16%
		Pambazuko (Ifakara) – 16%

Lindi	Pwani	Ruvuma
Radio (n= 44 weekly radio listeners)	Radio (n= 52 weekly radio listeners)	Radio (n= 46 weekly radio listeners)
TBC Taifa – 50%	TBC Taifa – 72%	Radio Free Asia – 91%
TBC FM – 48%	Radio Free Africa – 28%	TBC Taifa – 75%
Radio Free Asia – 33%	Radio Abood – 26%	Radio Maria – 52%
Radio One – 26%	Radio Uhuru – 25%	Radio One – 36%
	Radio One- 17%	