



Ipsos Synovate

## Ipsos Public Affairs

The Social Research and Corporate Reputation Specialists

### **Tanzania Media Fund**

**[Baseline Community and Decision Maker  
Media Perception Survey]**

## Executive Summary

The Tanzania Media Fund (TMF) was launched in Tanzania in 2008 with the aim to enhance the quality and independence of the Tanzanian media and, ultimately, to promote domestic accountability in Tanzania. Through support to institutions involved in media production as well as individual journalists, TMF strives to increase public appreciation of the role of the media in domestic accountability and achieve structural change within institutional media organisations that benefit from TMF grants. The Media Perception Survey outlined here serves to measure current public perceptions of the media in Tanzania and provide the framework for monitoring TMF's effectiveness in increasing public appreciation of the role of the media in domestic accountability during TMF's second phase, from 2012 to 2016.

This study has looked at the opinions of ordinary citizens (n=2000) as well as a small sample of decision makers at community level (n=200). Chapters 1 and 2 provide a background sketch and methodology for the survey, followed by a detailed overview of the findings for the general public and decision makers in Chapters 3 and 4. Overall, ordinary citizens and decision makers alike feel the Tanzania's media sector is growing and improving over time, and the sector is serving a news-hungry public that wants the media to keep those in positions of power accountable. However, this study also points to perceptions of shortcomings in the media, both in terms of the content it provides to the public and the quality of the services it provides. The main findings are briefly highlighted in this executive summary, full details can be found in the report itself.

The Tanzanian media has a receptive audience, with only a miniscule proportion (3.4%) of Tanzanians professing to be disinterested in news and current affairs. The vast majority of Tanzanians get their news from the radio, with over 96% of the population making use of this medium and more than half the population using radio exclusively. This media format continues to reach almost all segments of the population, and is without a doubt the main type of media for reaching vast numbers of Tanzanians. Television has a fair reach at 42%, particularly amongst the youth, but those in rural areas and older Tanzanians are unlikely to have access to a television. Newspapers come at the bottom of the list with only 32% reach among Tanzanians.

Illiteracy and issues of affordability have created a difficult environment for newspapers, which are likely to remain in their niche for some time. Similarly, while the internet may be speeding up news delivery dramatically in many parts of the world, this is not yet a format that has a broad reach in Tanzania. Only 6.4% of the community sample has access to the internet at all. Nevertheless, the exponential growth in mobile technology and the influx of more affordable smart phones it is likely to support a dramatic increase in internet usage over the next decade – the vast majority of Tanzanian internet users access the internet using their mobile phones.

Perceptions of the quality of the media were explored with the public and with decision makers. Overall, the top of mind impression was very positive, with the overwhelming majority perceiving the media to have improved, agreeing it had a lot going for it. When examining quality in more detail using a quality index, clear distinctions were found across the media types for both the community and decision maker groups. Perceptions of newspaper and television performance were very average, the former scoring lowest. Radio, although perceived more positively, still had ample room for improvement. Distinctions across urban and rural lines showed that urban Tanzanians are far more critical than their rural counterparts, with significantly poorer perceptions of quality across all media types.

Professionalism and diversity of content are perceived to be weak areas across all three media types by Tanzanians in general. These issues should be placed at the top of the list for TMF to address. Perceptions of the accuracy and independence of newspapers and television are additional areas of poor performance which will require focussed effort to improve.

Newspapers have trustworthiness and transparency further highlighted as weak areas in need of interventions. Improvements across these aspects in particular – professionalism, diversity of content, accuracy, independence, trustworthiness and transparency – will have the greatest impact on the perceptions of media quality overall.

In terms of media content, both the general public and decision makers indicated that health, education and social issues are the most important topics to them. Views on the diversity of coverage of the various topics of interest were unanimous that politics gets more than its fair share of coverage, in particular the voice of the ruling party. There is room for more coverage on rural-related issues and around people with disabilities. The more popular topics such as health, social and entertainment were perceived to get sufficient coverage. Viewpoints regarding the importance of the media's role as well as its success in creating accountability were unanimous – for both the community and decision maker groups. Tanzanians believe that the media is living up to its responsibility to keep the Government accountable, keeping citizens informed about what the Government is doing and playing the role of 'watchdog' in society.

As part of the survey, an understanding of the impact of the media generating action was explored. More than a quarter of the public and almost 40% of decision makers have taken personal action after learning about something from the media, and a larger proportion still has witnessed media publications leading to actions by others. Social issues were most likely to have been noticed, followed by health, education and environmental issues. Whether it was action witnessed or personally taken, educating others on the topic was without a doubt the most common response, while approaching the Government or offering donations and assistance were frequently mentioned. The action taken tended to have a direct impact, with the majority of cases being completely or partly resolved after action was taken.

After a short review of the study limitations in Chapter 5, the study concludes in chapters 6 and 7 with the question of what these findings mean for the work of TMF, and what kind of indicators will help TMF to monitor its performance. For quick reference, a table with indicators is provided in Appendix 4. TMF is advised to monitor the perceptions of the public regarding the media overall, but to set specific indicators for perceptions of quality for radio, television and newspapers – taking into account the current perception levels. Similarly, TMF should monitor the perceptions regarding the media's success in creating accountability, but should set specific indicators for action taken by Tanzanians as a result of media exposure as well as the effectiveness of such actions.

**Table of Contents**

Chapter 1: Introduction.....	1
Chapter 2: Research Methodology .....	3
Chapter 3: Main Findings: Community.....	13
Chapter 4: Main Findings: Decision makers .....	55
Chapter 5: Study Limitations and Lessons Learnt .....	82
Chapter 6 : Measurable Indicators.....	84
Chapter 7: Conclusions and Recommendations.....	100
References.....	103
Appendix.....	104

**Abbreviations and Acronyms**

NGO	Non-Governmental Organisation
PAPI	Pen and Paper Interviews
PPS	Proportional to Size
PSU	Primary Sampling Unit
SPSS	Statistical Package for the Social Sciences
TMF	Tanzania Media Fund

## Chapter 1: Introduction

### 1.1 Background of the study

The Tanzania Media Fund (TMF) was launched in Tanzania in 2008, and completed its first phase in June 2012. Through offering support to the media, TMF aims to enhance the quality and independence of the Tanzanian media and, ultimately, to promote domestic accountability in Tanzania. TMF believes that a vibrant and independent media functions as a watchdog to society, and enhances accountability by providing both citizens and authorities with critical and accurate information.

In order to support quality journalism, TMF provides grants to institutions involved in media production as well as individual journalists. Capacity building activities, such as mentoring, are part and parcel of TMF's grant-making structure. An increase in quality and quantity of public interest journalism and investigative journalism is expected to influence the public appreciation of the role of the media in domestic accountability. Structural changes in the media provide a sustainable environment for an increasingly vibrant and critical media sector. Hence, TMF has formulated two outcomes for its second phase, which runs from 2012 to 2016:

1. Increased public<sup>1</sup> appreciation<sup>2</sup> of the role of media in domestic accountability.
2. Structural changes within the participating institutional media organisations.

While these outcomes were also applicable to the first phase of TMF, their measurement has proven to be challenging due to the lack of a reliable baseline and accompanying indicators. Journalistic success was captured through success stories from grantees, but impact at macro level has been difficult to demonstrate. Therefore, the second phase includes a baseline to determine the public perception regarding the media in Tanzania – to be used for measuring change in the future as well as further enhancement of TMF's monitoring and evaluation structure.

### 1.2 Rationale for the study

The baseline study outlined in this report will serve to measure current public perceptions of the media in Tanzania and provide the framework for monitoring TMF's effectiveness in increasing public appreciation of the role of the media in domestic accountability. The research will also inform future intervention strategies.

### 1.3 Research objectives

The objectives of the baseline survey are to:

- Measure citizens' perceptions of the media in Tanzania in relation to quality of content and diversity of products.

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<sup>1</sup>Public is a collection of three groups: citizens, civil society and decisions makers

<sup>2</sup>Appreciation is not only defined as the opinion of the public about the role of media in domestic accountability but also about concrete action they undertook as result of media productions

- Measure citizens' perceptions of the Tanzanian media's contribution to domestic accountability.
- Measure decision makers' perceptions of the media in Tanzania in relation to quality of content and diversity of products.
- Measure decision makers' perceptions of the Tanzanian media's contribution to domestic accountability.
- Establish baseline information and data related to the above objectives, as well as measurable indicators, which will be used to inform TMF in its interventions in the media sector.

## Chapter 2: Research Methodology

The previous chapter discussed the background, rationale and objectives of the research. The following chapter will outline the research methodology employed. This will include the details pertaining to the research design, target population, sampling plan, survey instrument, data collection procedures, coding, data capture, data cleaning and data analysis.

### 2.1 Research design

In accordance with the study objectives, the research design included a national quantitative study using face-to-face pen and paper (PAPI) interviews. Both community decision makers as well as the general public were surveyed. The research results will serve as a baseline against which future results will be evaluated.

### 2.2 Target population

The survey with the general public (household survey) targeted men and women aged 18 years and above living in both urban and rural areas in Tanzanian Mainland and Zanzibar. The study recognized that media perception could be obtained at cohorts lower than 18 years but only 18 years and above were interviewed as this is the age at which one is recognized as an adult.

The target individuals for the decision makers' survey were Tanzanians living on the mainland and in Zanzibar who were influential members of the community and who made or influenced community decisions. Individuals such as religious leaders, head teachers, heads of Non-Governmental Organisations (NGO), government officials, politicians, leaders of women's groups, doctors, traditional healers, village or ward executives and cell leaders, would all qualify as decision makers.

### 2.3 Sampling Plan

The size of the sample and the way it is designed is one of the most important phases in the research process. The main outcome of the sampling plan was to ensure delivery of a quality sample that is representative of the Tanzanian target population and one that accommodates the reporting needs of TMF. With detailed population information it was possible to design a sample that can be grossed up to estimate the opinions of the defined target population.

A multi-stage-stratified sampling method was used to achieve a representative sample of the total population of 18 years and older. The sample frame is based on 2012 projections using the 2002 Tanzania Population and Housing Census data. Looking at the hierarchical subdivision of Tanzania (i.e. region>district>ward>village), wards were the smallest administrative unit available in the census population data. The wards were defined as the primary sampling units (PSU's). The various stages of the selection of the sample are discussed below.

#### 2.3.1 Sample size

A requirement of any sample that is to be utilized for monitoring and evaluation purposes is that it needs to be extremely robust. Detailed demographic analysis is not possible without an adequate sample size and results produced based on inadequate sample sizes are relatively unstable.



The size of a sample is determined by:

- The number of factors that cause variation in results;
- The level of detail on which results will be reported;
- The level of accuracy;
- Geographic spread.

Taking into consideration sampling errors and non-sampling errors, a sample of 2000 was found to be appropriate for the household study. Increasing the size has the desired effect of reducing the sampling errors. Non-sampling errors on the other hand tend to rise with increases in the size of the sample, since it becomes more difficult to control the quality of a larger field operation. A sample size of 2000 was operationally manageable for all survey activities. The precision for this sample size is  $\pm 2.0\%$  at the 95% confidence level.

In order to ensure an adequate sample to understand opinions from decision makers, this separate sample was set at 200. Although a larger sample would provide more reliable results, TMF limited the decision makers sample to 200. As such broad conclusions only should be drawn from these results. The precision for this sample size is  $\pm 6.9\%$  at the 95% confidence level.

### **2.3.2 Sample distribution**

#### **2.3.2.1 Household sample distribution**

The household sample distribution was designed to be proportional to size (PPS) across the regions and was further disaggregated to ensure representative proportions across urban and rural lines. The urban/rural split was 30:70 to mirror the population as per the 2012 projections from the 2002 Tanzanian Housing and Population census data. Areas with larger populations were thus allocated larger samples and vice versa for areas with smaller populations.

The population and sample distribution by region and setting (urban/rural) can be seen in Table 2.1.

Within each region, districts for interviewing were randomly selected. The distributions of the interviews per district were calculated to be proportional to district size. Similarly, the districts selected for interviewing were further disaggregated randomly into wards.

The final household sample achieved was 2000, of which 1400 (70%) interviews were conducted in rural areas and 600 (30%) in urban areas. After reviewing the sample distributions, weights were calculated and data was adjusted to ensure a representative spread (in accordance with 2002 Tanzania Population and Housing Census results) across region, setting, gender and age lines.

Table 2.1: Household sample distribution by region and setting

Region	Rural	Urban	Total
Arusha	51	28	79
Dar es Salaam	10	161	171
Dodoma	75	22	97
Iringa	66	20	86
Kagera	96	13	109
Kigoma	54	20	74
Kilimanjaro	64	23	87
Lindi	34	14	48
Manyara	51	11	62
Mara	57	21	78
Mbeya	91	28	119
Morogoro	70	35	105
Mtwara	50	17	67
Mwanza	115	37	152
North Pemba	10	0	10
North Unguja	10	0	10
Pwani	38	14	52
Rukwa	50	14	64
Ruvuma	55	12	67
Shinyanga	134	21	155
Singida	50	14	64
South Pemba	10	7	17
South Unguja	10	0	10
Tabora	72	26	98
Tanga	77	20	97
Urban West	0	22	22
<b>Total</b>	<b>1400</b>	<b>600</b>	<b>2000</b>

### 2.3.2.2 Decision maker sample distribution

For the decision makers' sample, one interview was conducted per ward. Two hundred wards were randomly selected from the wards chosen for the household survey. All regions were represented. The sample distribution by region and setting (urban/rural) can be seen in Table 2.2.

The final decision makers sample achieved was 200, of which 140 (70%) interviews were conducted in rural areas and 60 (30%) in urban areas. After reviewing the sample distributions, weights were calculated and data was adjusted to ensure a representative spread (in accordance with 2002 Tanzania Population and Housing Census results) across region and setting lines.

Table 2.2: Decision makers sample distribution by region and setting

Region	Urban	Rural	Total
Arusha	3	4	7
Dar es Salaam	20	2	22
Dodoma	2	5	7
Iringa	1	8	9
Kagera	2	12	14
Kigoma	2	7	9
Kilimanjaro	2	5	7
Lindi	0	4	4
Manyara	2	8	10
Mara	3	4	7
Mbeya	1	13	14
Morogoro	5	5	10
Mtwara	2	6	8
Mwanza	5	8	13
North Pemba	0	1	1
North Unguja	0	1	1
Pwani	2	4	6
Rukwa	1	4	5
Ruvuma	1	6	7
Shinyanga	0	12	12
Singida	1	6	7
South Pemba	0	0	0
South Unguja	0	1	1
Tabora	2	8	10
Tanga	1	6	7
Urban West	2	0	2
<b>Total</b>	<b>60</b>	<b>140</b>	<b>200</b>

### 2.3.3 Respondent selection

#### 2.3.3.1 Household and respondent selection

Once the sample was distributed to ward level, a list of villages was obtained from the local government office. One or two villages were randomly selected from the list, depending on the sample allocated to the ward. A maximum of thirteen interviews were conducted per village, hence one village was selected if the sample per ward was thirteen or less, or two if the sample was between thirteen and twenty.

Upon selection of the villages, the village executive secretaries or village elders were consulted in order to assist the team in identifying the village boundaries and introduce the team to the households within the selected village. In each village a landmark was identified which would act as starting point for household selection (such as a school or church). All landmarks selected were permanent features.

From the assigned landmark the interviewers used a “Random Walk” or “Random Route” applying the left hand rule to select the household. The starting household was determined by the date on which the interview was being conducted. For example, if it was the 28<sup>th</sup> of the month, the starting household was 2 + 8 which is the 10<sup>th</sup> house from the landmark. After completing a successful interview at the first selected household, or making an appointment, four households (using the left hand rule) were skipped, making the 5<sup>th</sup> household the next eligible household.

Upon gaining access to the selected households, a household register was developed. According to the Tanzanian National Bureau of Statistics a household is defined as individuals living under the same roof and having a common feeding arrangement. This excludes visitors. This was verified by the interviewers asking questions about the number of people who lived under the same roof and ate together. If there was more than one eligible person in the household, the Kish grid approach was used to select which person to interview (See Appendix 1 for an example of a Kish grid). If the selected person was not available the interviewer made up to three re-calls on different times of the day (including evenings). If the selected respondent was away from home and would not be available, no call backs were made and the selected respondent was substituted in another household.

### **2.3.3.2 Decision maker respondent selection**

Only one influential opinion leader or decision maker was interviewed per village. To secure an interview with a qualifying individual within a village, the village elders together with members of the community were consulted to recommend a person whose opinion was respected, and sought after, in the village. This could be a ward secretary, a traditional healer, a doctor, a teacher, a religious leader, or someone of a similar profile. To ensure that all decision maker profiles were covered, the coordinator received daily updates on the decision makers selected to monitor and ensure a wide representation of leaders.

## **2.4 Survey instruments**

### **2.4.1 Questionnaire development and translations**

Two questionnaires were designed, one for the decision makers’ interviews and one for the general public. All questions included in the general public questionnaire were also included in the decision makers’ questionnaire, with additional questions for decision makers.

The questionnaires were developed in consultation with TMF who gave final sign-off of the questionnaires. The questionnaire was compiled after extensive review of TMF materials. The general public / household questionnaire comprised nineteen A4 pages (see in Appendix 2) and the average questionnaire length was between thirty-five minutes and one hour. The decision makers’ questionnaire comprised twenty-four A4 pages (see in Appendix 3) and the average questionnaire length was between forty-five minutes and one hour.

The final questionnaires were translated from English to Kiswahili. Two independent professional translators who have experience with research questionnaires were engaged for the translation process. Two translators independently forward translated the English questionnaires into Kiswahili. These translators compared their respective translations and discussed and resolved any disparities. A multilingual, experienced project manager who participated in the questionnaire development worked together with the translators to finalize on the Kiswahili questionnaires. Once the questionnaires were approved they were converted into formic to facilitate accurate and speedy data capture.

## 2.4.2 Piloting of the questionnaire

The questionnaires were piloted by the field supervisors prior to training interviewers on the survey. The supervisors are more experienced in research and hence were better able to evaluate the questionnaire. Forty-four pilot interviews were conducted. The objective of the pilot was to evaluate the consistency, flow, and understanding of the questions as well as the quality of the translations. In addition, the pilot determined how the questions were being interpreted and if they yielded relevant answers.

The findings from the pilot exercise were discussed and final recommendations for questionnaire revisions were identified and implemented.

After receiving training on the questionnaire, and prior to fieldwork, a second pilot was conducted on the 17<sup>th</sup> and 18<sup>th</sup> October 2012 by the interviewers and supervisors. The key advantage to the second pilot was to provide the field supervisors with a clear indication of the interviewers' understanding of the tools and methodology. The lessons learnt from the pilot were incorporated into the training curriculum and final relevant changes made to the questionnaire.

None of the pilot questionnaires were included as part of the survey.

## 2.5 Data collection procedures

### 2.5.1 Training of the field staff

The selection of interviewers was carried out by the Field Manager. The following criteria were used to select the interviewing team:

- Experience in conducting public affair household studies
- The ability to interact with all classes of people
- The ability to create a rapport with the respondents
- A track record of performance in past projects
- An Advanced-level secondary education or above
- An understanding of at least one of the study regions
- An ability to work well with rural communities

A team of 67 interviewers were trained to work on the general public / household survey and 25 interviewers for the decision makers' survey.

The interviewers were trained over a period of 3 days in Dar es Salaam and Mwanza. Training was facilitated by the project manager and the field manager, using a participatory approach. The training focused on the following areas:

- Understanding the rationale for the study
- Survey objectives and expected output
- Survey methodology, procedures for identifying the member of the household to interview

- Procedures of sampling target respondents- members of the household who are 18 years and above.
- Working with local government authorities and respect for protocols
- Strategies of gaining the interviewees attention
- Substitution rules
- How to administer each question in the questionnaire
- How to handle potential questions during the survey
- Gaining acceptance by the respondents
- Getting genuine answers from respondents
- Dos and don'ts of the research project.
- Interviewer bias
- Editing of questionnaire on the spot
- Safety / security / health measures in field
- Code of behaviour in field

After training and piloting was complete, the final group of successful interviewers was selected.

### 2.5.2 Fieldwork

Ipsos Synovate applied on the 2<sup>nd</sup> October 2012 for permits to conduct TMF research in Tanzania mainland and in Zanzibar. The permit for mainland Tanzania was issued on 12<sup>th</sup> October 2012 so fieldwork commenced in Dar es Salaam on the 18<sup>th</sup> October 2012, followed by the other regions a few days later. Fieldwork continued up until the 10<sup>th</sup> November 2012.

The final fieldwork team comprised 57 interviewers and 22 supervisors. Most supervisors were assigned 3-4 interviewers to manage; in some of the more sparsely populated areas the ratio was lower.

Table 2.3: Team distribution per region

Region	Supervisor	Interviewers
Arusha	1	3
Dodoma	1	4
Iringa	1	2
Kagera	1	4
Kigoma	1	4
Kilimanjaro	1	4
Lindi	1	1
Manyara	1	1
Mara	1	2
Mbeya	1	4
Morogoro	1	4
Mtwara	1	2
Mwanza	1	3

Rukwa	1	2
Ruvuma	1	2
Shinyanga	1	4
Singida	1	1
Tabora	1	4
Tanga	1	1
Zanzibar	1	3
Pemba	1	1
Pwani	1	1
<b>Total</b>	<b>22</b>	<b>57</b>

The following procedures were implemented to ensure successful management of fieldwork:

- A logistical plan for fieldwork detailing transport, subsistence, safety and security concerns and precautions implemented
- Fieldwork manual, spelling out field work procedures and substitution rules in line with the methodology
- Quality control measures
- Daily progress reports including completion of required number of interviews and status of quality control status
- Progress reports to a technical committee at various stages of fieldwork

During fieldwork, interviewers were required to keep track of all contacts made, regardless of a successful interview. This information was collated and analysed at the end of fieldwork. The frequencies of the unsuccessful and successful contacts can be viewed in Table 2.3

Table 2.4: Frequency of fieldwork contact types

Contact Type	Frequency
Door closed	196
Household refusal	81
Respondent Refusal	78
Language barrier	38
Household vacant	100
Under age only at home	85
Termination before completion	32
Successful	2000
<b>Total Calls</b>	<b>2610</b>

### **2.5.3 Major fieldwork challenges**

Most of the challenges experienced during fieldwork had been anticipated and interviewers were sufficiently prepared for these during the upfront training and pilots.

#### **2.5.3.1 Low literacy and / or education levels**

Low literacy and / or education levels were particularly prevalent in rural areas. The length of the interview was extended in these cases as the answer options had to be read out and repeated by interviewers to ensure understanding and interview quality.

#### **2.5.3.2 Poor accessibility of rural wards and the impact of rain**

Limited or no transport to rural wards and the impact of rain on accessing several villages were a major challenge. Many areas were difficult to access as transport from ward to village level is not always reliable or available. This was the case in Kagera, Mara, Morogoro, Arusha and Tanga regions. The Kagera region was badly affected by the rains and several roads were destroyed.

#### **2.5.3.3 Language Barrier**

It was a challenge to understand people in some regions due to language barriers. Wherever possible, this was overcome through using interpreters and village leaders. This was experienced in Shinyanga, Arusha, Rukwa, Kigoma and Manyara.

#### **2.5.3.4 Illnesses and Accidents**

Diseases and accidents did pose some delays during field work. Most accidents were due to using motorcycles in regions which were not accessible by vehicles. In Kagera, Mara, and Morogoro the teams were involved in motorcycle accidents and had to receive treatment from the nearest health centres before continuing with work. In Morogoro, one interviewer was seriously injured and could not continue with the exercise. She was replaced. In Singida, an interviewer suffered from malaria and was treated from a nearby dispensary before continuing with work.

### **2.5.4 Quality controls**

A number of quality control procedures were implemented to ensure successful fieldwork.

Each supervisor was responsible for 100% questionnaire editing. Any issues that needed clarification were corrected by returning to the respondent who was interviewed. Questionnaires were edited within the same day of interview and before moving onto the next village. In addition, supervisors accompanied 35% of the interviews to ensure the research methodology was followed and that the questionnaire was being administered correctly.

Aside from the supervisors, the project had a quality control team comprising of back-checkers and a project manager. The quality control team operated independently of the field team. The quality control team conducted a 16% telephonic back-check of each interviewer's work for the general public sample and a 15% back-check for the decision makers' sample. Back checkers verified that the interview took place and checked that all questions were asked.



## 2.6 Coding, data capture, cleaning and analysis

Questions which made sense to code were coded. Coding took place in Kiswahili and the final code lists were translated back into English. The code list was checked and adapted by a research specialist working on the project. Verbatim questions that were not suitable for coding were captured and translated into English for easy review.

Data capture was processed using optic ink character recognition technology (scanners). This technology offered remarkable accuracy and speed in data capture. The questionnaires were designed in a formic program to make them compatible with this technology. Data capture took place in Dar es Salaam. Prior to data capture, questionnaires were received by the scanning supervisor who checked and verified that they were in good order. To ensure that data was correctly captured, 15% of the questionnaires were re-scanned and 10% physically checked for inconsistencies.

Before the survey started the data analyst compiled a data cleaning program using the pilot data. Once data capture (scanning) was completed and all the verifications done, the data was exported using the formic export module into SPSS (Statistical Package for the Social Sciences). During cleaning, all errors identified were discussed and resolved with the project manager and field manager.

After data cleaning the frequencies were checked to ensure the correct distributions were obtained in terms of region, setting, gender and age (region and setting only for decision makers' data). After data validation the statistician on the project weighted the data to the correct distributions as per the National Bureau of Statistics<sup>3</sup> Population and Housing Census 2002 data.

After weights were applied the tables were run, including splits on gender, age, region, setting, education and internet access. Tables were checked for accuracy and logic and any discrepancies were resolved.

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<sup>3</sup>[www.nbs.go.tz](http://www.nbs.go.tz)

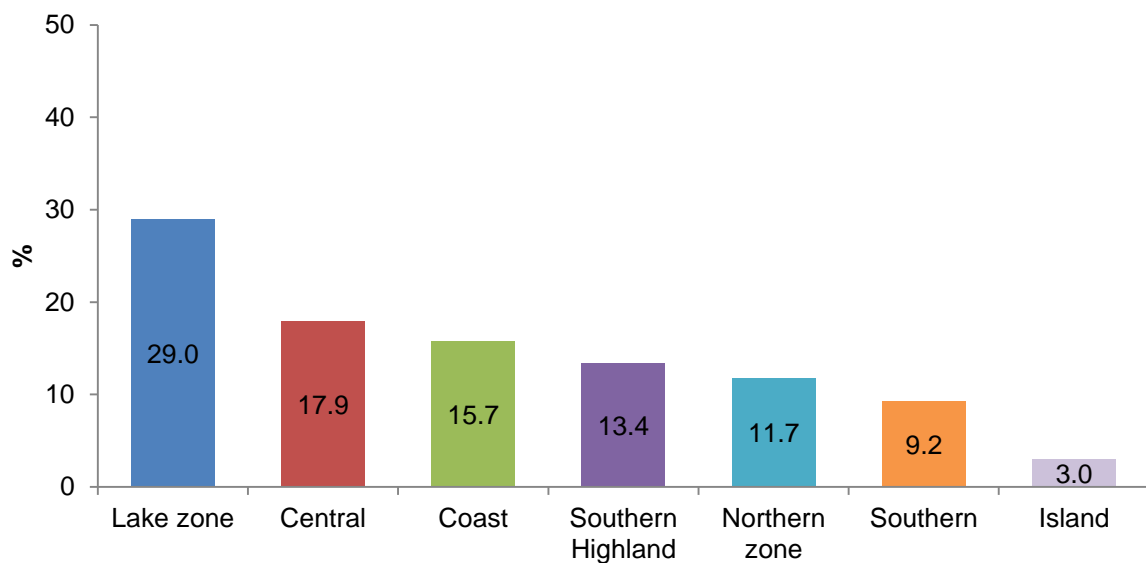
**Chapter 3: Main Findings: Community**

The previous chapter outlined the methodology employed in the baseline survey. This chapter will cover the results from the survey. All data presented from this point onwards reflect weighted results.

**3.1 Respondent characteristics**

The general public sample comprised of 2000 respondents, of which 1400 (70.0%) lived in rural areas and 600 (30.0%) resided in urban areas. The sample distribution per region can be seen in Graph 3.1.

Graph 3.1: Percentage distribution of region (n=2000)



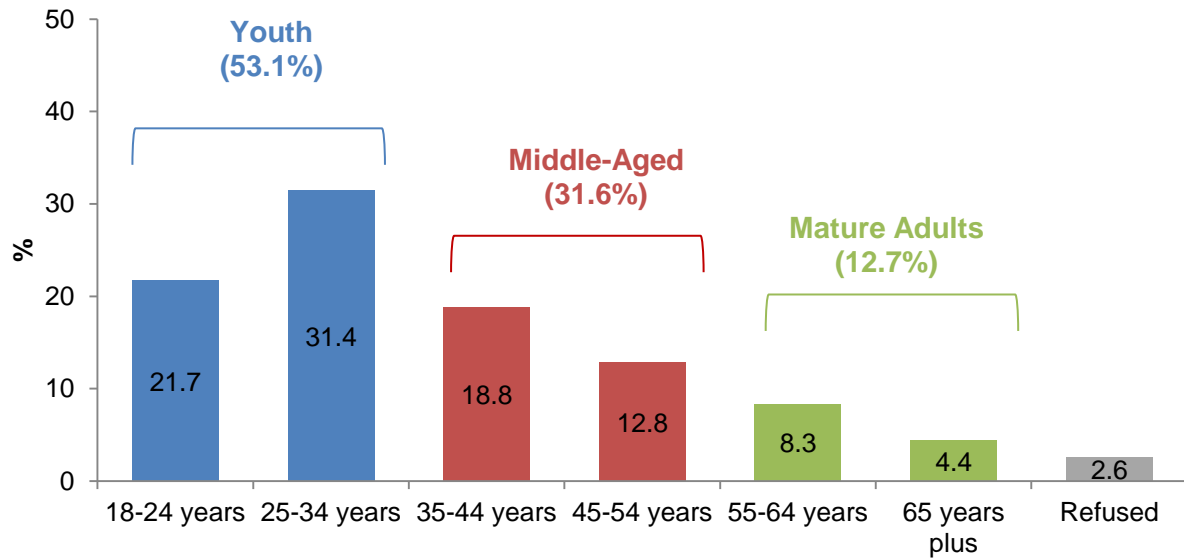
The following areas comprised each region:

- Lake Zone (Mwanza, Shinyanga, Mara, Kagera, Kigoma)
- Northern Zone (Arusha, Manyara, Kilimanjaro)
- Coast (Dar es Salaam, Pwani, Tanga)
- Central (Morogoro, Dodoma, Singida, Tabora)
- Southern Highland (Mbeya, Rukwa, Iringa)
- Southern (Lindi, Mtwara, Ruvuma)
- Islands (Unguja, Pemba)

The split across gender lines was 1033 female (51.7%) and 967 male (48.3%).

The ages of respondents comprised adults 18 years plus with more than half those interviewed being youth (18-34 years). The details of the age distribution can be seen in Graph 3.2.

Graph 3.2: Percentage distribution of age (n=2000)



Majority (70.8%) of the sample had no secondary school education, while a marginal portion had tertiary education (4.2%). Table 3.1 reflects the educational status of the respondents.

Table 3.1: Percentage distribution of the highest educational level achieved (n=2000)

Education	Percentage (%)
No formal education	6.7
Some primary school	4.5
Primary completed	59.6
Some secondary school	4.1
Secondary school completed	18.4
Tertiary Education	4.2
Refused	2.5

### 3.2 Media behaviour

#### 3.2.1 Media reach and usage

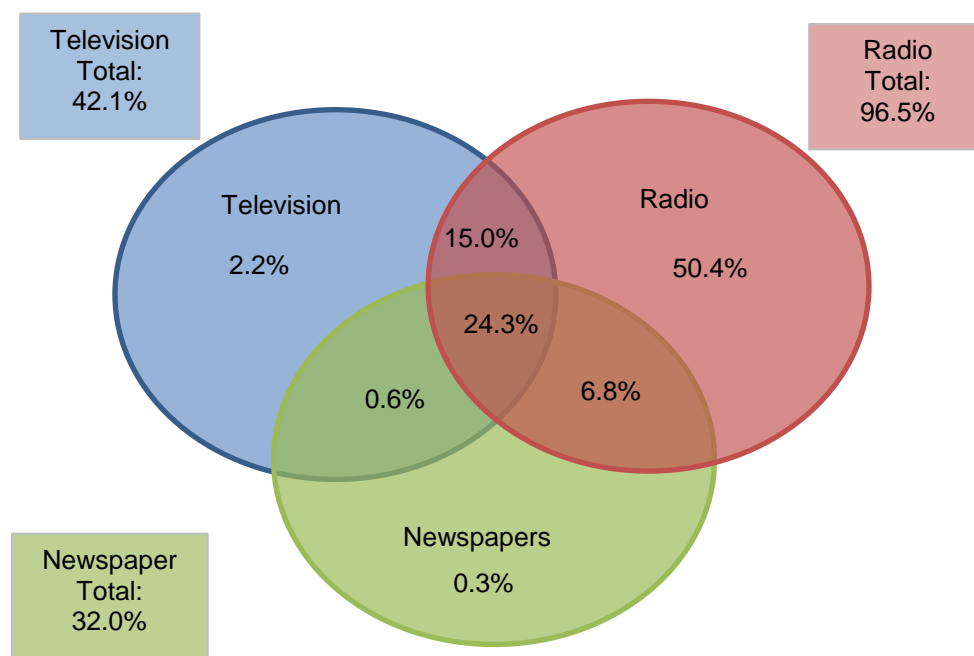
Radio as a medium reaches most Tanzanians (96.5%) with half the sample surveyed (50.4%) having access to radio only. Significant differences are apparent across urban/rural lines. In rural areas approximately two-thirds (61.5%) remain reliant on radio as a sole means of formal communication on news and current affairs while in urban areas this proportion drops to just under a quarter (24.3%).

According to TAMPS<sup>4</sup> data on media consumption collected annually since 2006, affordability and access are still core barriers to television usage with only 42.1% of the respondents having access to this media type overall. Unsurprisingly, television boasts significantly greater usage in urban areas (67.5%) as opposed to the less affluent rural areas (31.2%).

Overall newspaper has the lowest reach of the three mediums (32.0%), with illiteracy<sup>5</sup> preventing many Tanzanians from using this medium. Although dual usage of the media types is relatively low, it is positive to see that approximately a quarter (24.3%) of respondents overall are able to access radio, television and newspapers. This figure jumps to 38.7% in urban areas and drops to 18.1% in rural areas.

Figure 3.1 illustrates the media reach and usage for the overall sample, while Figures 3.2 and 3.3 illustrate the results for the urban and rural areas respectively.

Figure 3.1: Overall percentage reach and usage of media types (n=2000)



<sup>4</sup>Tanzania All Media and Product Survey

<sup>5</sup>22.5% of males and 37.8% of females are illiterate according to the 2002 Tanzania Population and Housing Census.

Figure 3.2: Urban percentage reach and usage of media types (n=600)

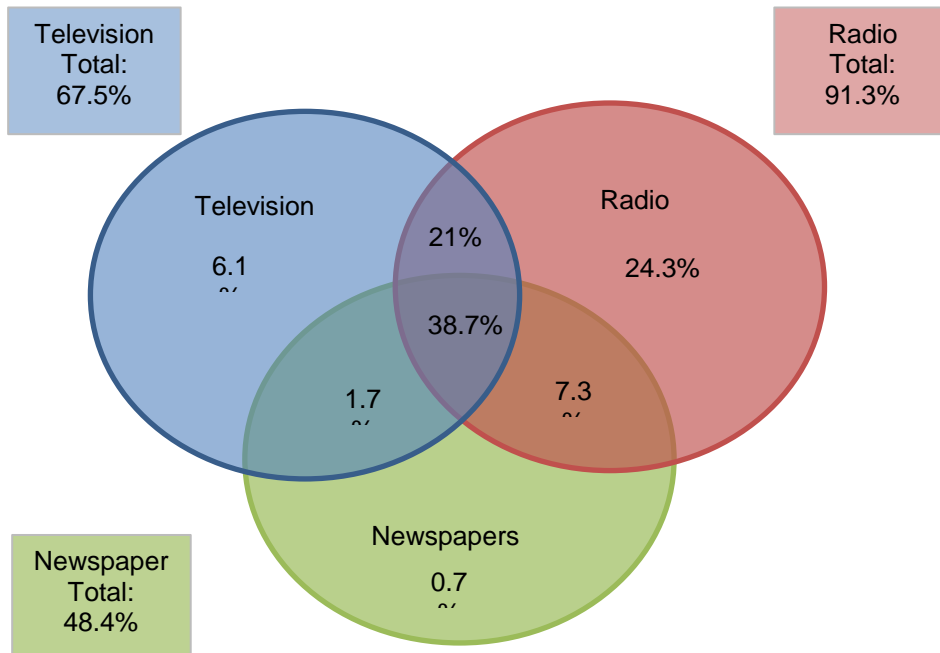
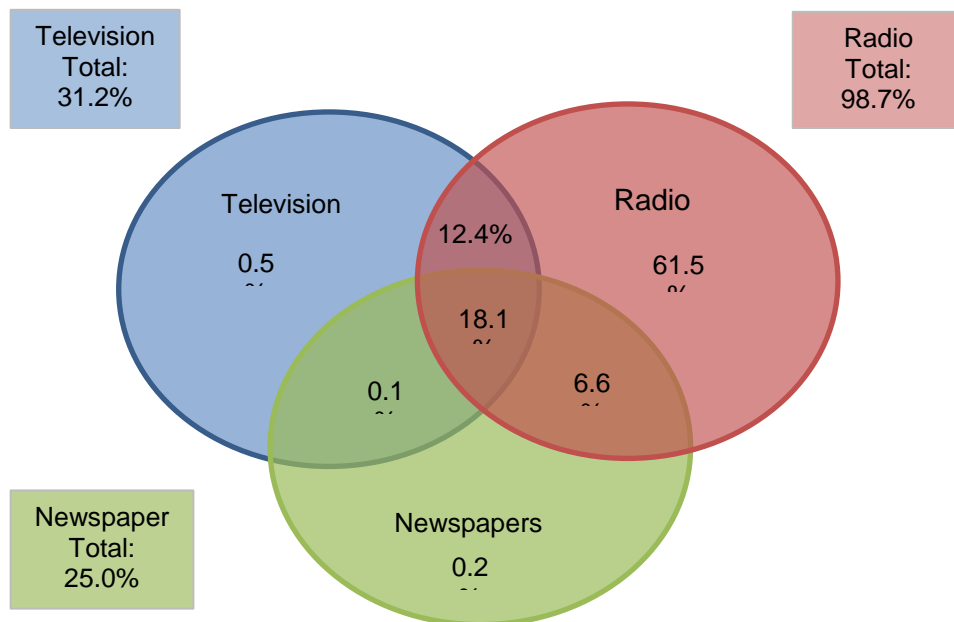


Figure 3.3: Rural percentage reach and usage of media types (n=1400)



A review of media usage across gender, age, education and regional lines reveals some interesting patterns. Table 3.2 outlines the results across these demographics.

Radio as a medium does not discriminate across demographics. Reach (90% plus) is fairly consistent across demographics.

There are no substantial differences by gender apart from males having slightly higher usage (35.9%) of newspapers than females (28.4%).

When looking at age, there is a clear pattern of television reaching fewer Tanzanians as age increases, while newspaper usage has more readership amongst both the youth and middle-aged groups relative to the mature adults.

A clear trend shows that as education increases so does access to television and newspapers. Interestingly, although tertiary educated Tanzanians are far more literate and well-educated than other Tanzanians, only 59.5% of them read newspapers. This could be an indication of a general apathy to read or perhaps a disinterest in, or dissatisfaction with, the current content of local newspapers.

Table 3.2: Percentage reach and usage of media types by gender, age, education and region

	Television reach	Radio reach	Newspaper reach
<b>Gender</b>			
Male (n=967)	44.0	97.6	35.9
Female (n=1033)	40.3	95.4	28.4
<b>Age</b>			
Youth (n=1062)	43.8	95.8	32.3
Middle-aged (n=632)	41.1	97.4	33.8
Mature adults (n=254)	34.8	97.3	25.6
<b>Education</b>			
No formal education (n=133)	22.5	96.0	11.8
Some primary school (n=91)	28.4	95.1	22.9
Primary completed (n=1193)	35.8	97.2	26.3
Some secondary (n=82)	63.3	97.2	48.1
Secondary completed (n=368)	61.3	95.2	49.4
Tertiary (n=85)	75.7	92.6	59.5
<b>Region</b>			
Lake Zone (n=580)	19.1	97.2	11.8
Northern Zone (n=235)	58.4	97.1	40.4
Coast (n=315)	64.2	90.5	50.8
Central (n=359)	44.2	97.9	38.8
Southern Highland (n=268)	44.7	96.5	33.4
Southern (n=184)	29.0	100.0	31.2
Islands (*n=60)	100.0	100.0	52.4

\*interpret with caution due to small base

Differences in television and newspaper reach are most apparent regionally. The Lake Zone has the lowest reach out of all regions with a dismal 11.8% reading newspapers and only 19.1% watching television. Reach is slightly higher but still very low in the Southern region with television and newspaper reach sitting at 29.0% and 31.2% respectively. Tanzanians living in these areas are very reliant on radio as a means for formal information communication. The Coast has the highest penetration for both television (64.2%) and newspaper (50.8%), a clear indication of the more affluent profile of these residents<sup>6</sup>. A boost from being a prime destination for tourism has likely allowed for increased access to both television (58.4%) and newspapers (40.4%) in the Northern Zone, which follows on from the Coast in terms of media penetration. The Central and Southern Highland regions are very similar in terms of television and newspaper reach with mediocre levels evident here.

Turning to particular newspapers read by those who do read newspapers, Table 3.3 illustrates those brands read once a week or more often. The top three most regularly read newspapers are Mwananchi (58.2%), Nipashe (46.3%) and Mwanaspoti (35.7%).

Apart from Mzalendo, Majira and Uhuru benefiting from more regular usage in rural areas, very few differences are obvious among the top brands most frequently read when comparing urban and rural readership. Looking at gender, Mwanaspoti is significantly more popular amongst males while Ijumaa and Uwazi are firm favourites amongst women. Other newspapers which are favoured more by men are Mtanzania, Mzalendo, Uhuru, Mwanahalisi and Champion. Age also showed some clear distinctions (Table 3.4). Mwananchi and Nipashe are slightly more popular among mature adults while Mwanaspoti, Ijumaa and Uwazi decline in popularity as age increases. Uhuru enjoys most readership from the middle-aged Tanzanians and the least from the youth.

Tables 3.5 and 3.6 illustrate the percentage regular (at least once a week) listenership of each Tanzanian radio station. Table 3.5 illustrates overall, as well as setting and gender differences while Table 3.6 illustrates listenership by age category.

A review of the radio listenership trends reveals that the most popular channels are very similar across urban and rural areas although the proportion of listenership does vary. TBC Taifa and Radio Free Africa are the top two most listened to stations in rural areas with more than two-thirds of rural radio listeners enjoying these stations at least once a week. This is substantially more than their urban counterparts, of which around half listen to these stations. TBC FM attracts more urban listeners, as do Clouds FM and Times FM.

Across gender lines, males tend to be more frequent radio listeners in general than females. Out of the top five most listened to stations, namely TBC Taifa, Radio Free Africa, Radio 1, TBC FM and Clouds FM, it is only Radio 1 which attracts similar proportions of male and female listeners. All others are skewed to male listenership.

An examination of listenership across the age categories shows that TBC Taifa increases in popularity as age increases while Radio Free Africa, TBC FM, Clouds FM and Kiss FM have more appeal to younger listeners as frequency of listenership declines as age increases. Much like Radio 1's appeal to both gender groups this is also a radio station for all ages.

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<sup>6</sup> Household Budget Survey of Tanzania 2007

Table 3.3: Percentage of newspaper readers who read each brand regularly (at least once a week) overall and across gender and setting lines

Newspaper Brand	Overall Newspaper readers (n=641)	Setting		Gender	
		Urban (n=290)	Rural (n=350)	Male (n=347)	Female (n=294)
Mwananchi	58.2	57.3	59.0	61.6	54.2
Nipashe	46.3	44.5	47.7	46.5	46.0
Mwanaspoti	35.7	36.2	35.3	44.0	25.9
Ijumaa	27.0	29.5	24.9	20.9	34.2
Uwazi	25.0	25.9	24.3	20.5	30.4
Mtanzania	23.8	23.3	24.2	27.6	19.2
Mzalendo	22.0	18.2	25.1	25.7	17.6
Majira	20.9	16.8	24.3	22.8	18.8
Uhuru	18.8	15.7	21.3	21.4	15.7
Mwanahalisi	18.7	18.5	19.0	21.2	15.9
Champion	16.9	17.0	16.9	20.8	12.4
Ijumaa Wikenda	14.5	16.1	13.2	10.4	19.4
Dimba	13.0	13.1	13.0	16.8	8.6
Tanzania Daima	11.7	11.5	11.9	14.5	8.3
Habari Leo	10.3	12.8	8.2	11.1	9.3
Bingwa	10.2	11.5	9.1	15.5	3.9
Daily news	10.2	10.5	9.9	11.7	8.4
Rai	9.7	7.7	11.4	10.8	8.4
Zanzibar Leo	9.5	8.6	10.2	10.8	7.9
Spoti Starehe	9.3	10.6	8.2	10.8	7.5
Changamoto	8.2	8.1	8.2	7.7	8.7
Hoja	7.2	8.0	6.6	8.2	6.0
East African	7.0	7.4	6.6	7.3	6.7
Raia Mwema	6.6	7.8	5.6	6.9	6.2
Kulikoni	6.5	4.1	8.5	6.2	6.8
Dira ya Mtanzania	6.4	6.8	6.1	7.2	5.5
EA Business Week	5.6	4.1	6.9	7.8	3.0
Taifa Letu	5.5	4.2	6.6	6.6	4.2
Jambo Leo	5.2	4.7	5.7	6.2	4.1
Kiongozi	5.2	5.9	4.7	4.4	6.3
Tazama Tanzania	4.5	4.2	4.9	5.0	4.0
Sunday News	4.2	3.8	4.6	3.7	4.8
Msemakweli	4.1	3.9	4.2	5.6	2.2
This Day	3.7	3.3	4.1	3.8	3.7
The Citizen	3.2	4.1	2.4	2.8	3.5
Guardian	3.0	4.5	1.8	4.2	1.6
The African	2.9	3.0	2.9	3.1	2.7
An Nuur	2.0	3.1	1.0	2.6	1.2
Business Times	1.3	1.3	1.3	1.8	0.7
The Express	0.7	1.5	0.0	1.0	0.4



Table 3.4: Percentage of newspaper readers who read each brand regularly (at least once a week) overall and across age lines

Newspaper Brand	Overall Newspaper readers (n=641)	Age		
		Youth (n=343)	Middle-aged (n=214)	Mature Adults (n=65*)
Mwananchi	58.2	56.6	58.9	69.6
Nipashe	46.3	42.4	48.6	52.5
Mwanaspoti	35.7	40.6	31.5	22.9
Ijumaa	27.0	33.7	21.7	13.7
Uwazi	25.0	28.2	23.4	16.3
Mtanzania	23.8	23.8	22.7	28.8
Mzalendo	22.0	20.3	24.8	23.4
Majira	20.9	20.3	22.4	21.9
Uhuru	18.8	12.3	27.9	23.6
Mwanahalisi	18.7	18.5	18.0	19.9
Champion	16.9	17.7	15.6	17.9
Ijumaa Wikenda	14.5	17.7	11.5	9.1
Dimba	13.0	13.2	13.6	11.4
Tanzania Daima	11.7	10.4	13.2	13.5
Habari Leo	10.3	12.2	7.7	8.6
Bingwa	10.2	10.4	9.0	11.7
Daily news	10.2	9.6	10.1	12.8
Rai	9.7	8.5	10.0	13.8
Zanzibar Leo	9.5	10.0	9.4	8.0
Spoti Starehe	9.3	10.3	8.0	7.6
Changamoto	8.2	8.3	6.3	12.9
Hoja	7.2	6.7	6.3	11.8
East African	7.0	8.0	3.6	10.3
Raia Mwema	6.6	6.1	6.9	9.0
Kulikoni	6.5	6.2	7.0	4.9
Dira ya Mtanzania	6.4	6.0	6.9	5.8
EA Business Week	5.6	6.6	3.7	8.3
Taifa Letu	5.5	6.1	4.1	8.4
Jambo Leo	5.2	5.3	4.4	9.3
Kiongozi	5.2	4.6	6.9	4.9
Tazama Tanzania	4.5	3.7	5.7	6.6
Sunday News	4.2	4.7	4.6	1.7
Msemakweli	4.1	3.8	4.2	4.8
This Day	3.7	3.1	3.9	7.8
The Citizen	3.2	3.5	2.7	3.6
Guardian	3.0	3.8	1.4	5.1
The African	2.9	3.2	3.1	1.5
An Nuur	2.0	2.2	1.3	3.1
Business Times	1.3	0.5	2.7	1.6
The Express	0.7	1.0	0.0	1.5

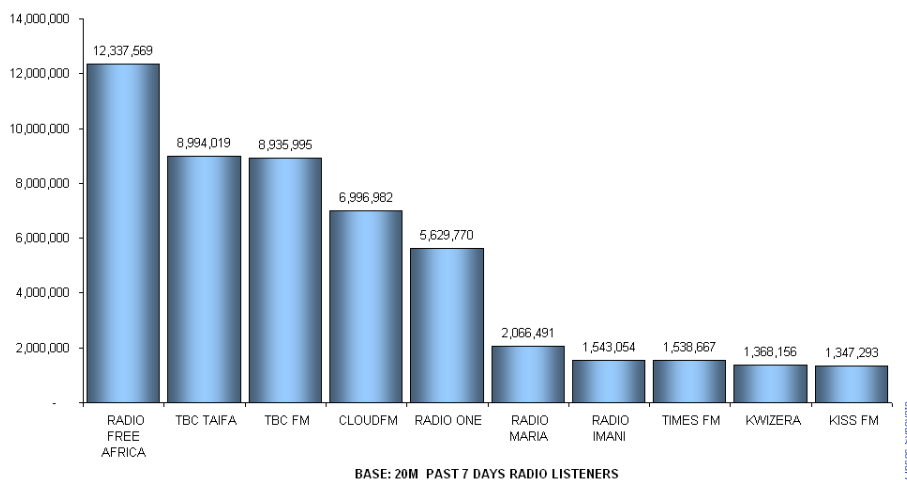
Table 3.5: Percentage of radio listeners who listen to each station regularly (at least once a week) overall and across gender and setting lines

Radio Brand	Overall Radio listeners (n=1930)	Setting		Gender	
		Urban (n=548)	Rural (n=1382)	Male (n=944)	Female (n=986)
TBC Taifa	64.9	51.9	70.1	69.6	60.4
Radio Free Africa	62.2	48.9	67.4	70.5	54.2
Radio 1	42.2	49.1	39.4	44.2	40.2
TBC FM	41.4	37.4	43.0	46.1	36.9
Clouds FM	25.3	37.9	20.3	28.1	22.6
KISS FM	12.5	15.9	11.1	15.0	10.0
Radio Sauti ya Injili	8.2	8.2	8.2	8.6	7.9
Radio Uhuru	7.4	8.8	6.9	7.6	7.3
Times FM	6.8	15.0	3.5	5.4	8.1
Bomba FM	6.7	5.7	7.1	7.1	6.3
Mbeya FM	5.8	3.4	6.7	5.5	6.1
Radio Five	4.9	5.8	4.6	6.2	3.7
Zenji FM	4.6	7.3	3.5	4.6	4.5
Abood FM	4.0	6.6	3.0	4.2	3.9
Passion FM	3.9	7.3	2.6	4.5	3.4
Magic FM	3.2	8.6	1.0	3.7	2.8
Kili FM	3.0	1.8	3.4	2.9	3.1
Mwangaza FM	2.9	1.6	3.4	3.1	2.6
Moshi FM	2.7	3.0	2.6	2.3	3.1
Sauti	2.0	2.3	2.0	2.0	2.1
Chuchu FM	1.9	3.4	1.3	2.2	1.7
Pride FM	1.6	1.5	1.6	1.2	2.0
Triple A	1.4	2.7	0.8	1.3	1.4
Mwambao FM	1.3	1.5	1.2	0.7	1.9
Sengerema	1.3	1.1	1.3	1.4	1.2
Hits FM	1.2	1.9	1.0	1.5	0.9
Spice FM	1.0	1.8	0.6	1.0	0.9
Radio Habari Maalum	0.8	1.0	0.7	0.8	0.9
Highlands FM	0.4	0.5	0.4	0.4	0.5
Mambo Jambo FM	0.4	0.5	0.3	0.6	0.2
Choice FM	0.4	0.9	0.1	0.5	0.2
Breeze FM	0.1	0.2	0.1	0.1	0.1
Kifimbo FM	0.1	0.0	0.1	0.1	0.0

These findings compare closely with TAMPS 2012 as indicated in the charts below.



## TOP 10 RADIO STATIONS BY REACH IN TOTAL SURVEY AREA



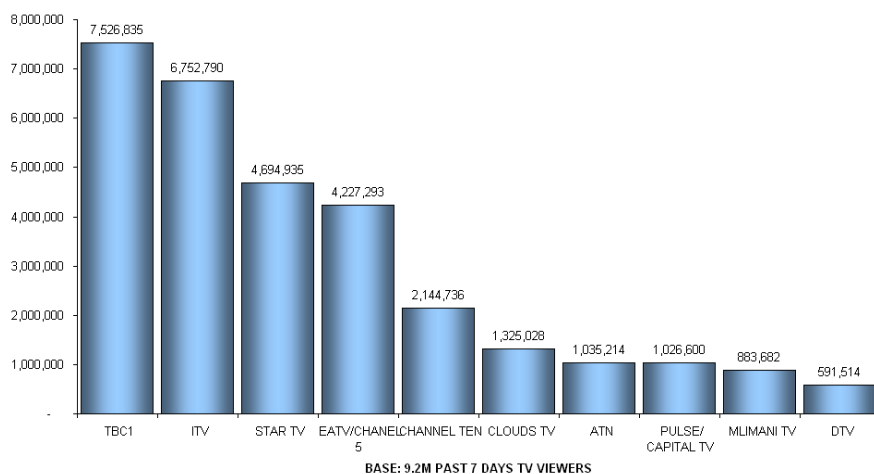
BASE: 20M PAST 7 DAYS RADIO LISTENERS

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## TOP 10 TV STATIONS BY REACH IN TOTAL SURVEY AREA



BASE: 9.2M PAST 7 DAYS TV VIEWERS

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Table 3.6: Percentage of radio listeners who listen to each station regularly (at least once a week) overall and across age lines

Radio Brand	Overall Radio Listenership (n=1930)	Age		
		Youth (n=1017)	Middle-aged (n=615)	Mature Adults (n=248)
TBC Taifa	64.9	60.7	68.7	75.5
Radio Free Africa	62.2	65.0	61.7	54.6
Radio 1	42.2	42.9	43.4	37.5
TBC FM	41.4	43.3	40.9	37.8
Clouds FM	25.3	30.8	21.1	13.8
KISS FM	12.5	15.2	11.0	7.1
Radio Sauti ya Injili	8.2	7.1	8.9	10.8
Radio Uhuru	7.4	9.0	5.1	7.8
Times FM	6.8	7.5	5.8	6.5
Bomba FM	6.7	7.8	6.2	3.5
Mbeya FM	5.8	6.0	6.0	4.6
Radio Five	4.9	6.1	3.9	3.6
Zenji FM	4.6	5.1	4.2	3.2
Abood FM	4.0	4.4	4.4	2.5
Passion FM	3.9	5.6	2.2	1.9
Magic FM	3.2	4.6	2.1	0.8
Kili FM	3.0	3.6	2.4	0.9
Mwangaza FM	2.9	3.2	3.0	1.4
Moshi FM	2.7	2.4	2.1	5.3
Sauti	2.0	2.4	1.6	2.0
Chuchu FM	1.9	2.7	1.2	0.9
Pride FM	1.6	2.1	1.2	0.9
Triple A	1.4	1.9	0.7	1.0
Mwambao FM	1.3	1.0	1.2	2.3
Sengerema	1.3	1.7	0.9	0.6
Hits FM	1.2	1.9	0.5	0.5
Spice FM	1.0	1.3	0.6	0.6
Radio Habari Maalum	0.8	0.9	0.4	0.9
Highlands FM	0.4	0.7	0.1	0.4
Mambo Jambo FM	0.4	0.5	0.3	0.4
Choice FM	0.4	0.3	0.4	0.0
Breeze FM	0.1	0.1	0.2	0.0
Kifimbo FM	0.1	0.1	0.0	0.0

Television viewership reveals TBC1, ITV and Star TV as the top three most regularly watched channels (see Table 3.7). This remains true for both urban and rural areas where proportion of viewership is very similar amongst television viewers. Other channels which attract significantly more urban viewers are EATV, Channel 10, Clouds TV, Mlimani TV and DTV. Regularity of viewership is similar across gender lines apart from Star TV which is slightly biased towards male viewership.

Looking at television channels regularly watched by age category (see Table 3.8), TBC1 has more appeal among older viewers while frequency of ITV and Channel TV viewership declines as age increases.

Table 3.7: Percentage of television viewers who watch each channel regularly (at least once a week) overall and across gender and setting lines

Television Brand	Overall Television viewers (n=842)	Setting		Gender	
		Urban (n=405)	Rural (n=437)	Male (n=425)	Female (n=417)
TBC1 TV	81.0	80.1	81.9	82.8	79.2
ITV	76.2	73.3	79.0	76.2	76.2
Star TV	57.6	59.5	55.9	63.5	51.6
EATV	36.0	42.7	29.9	37.3	34.7
Channel 10	23.3	29.6	17.4	22.1	24.5
Clouds TV	12.6	21.2	4.7	10.4	14.9
Mlimani TV	10.2	15.4	5.4	9.5	11.0
DTV	8.6	13.5	4.1	6.3	10.9
TV Zanzibar	7.5	8.2	6.9	7.9	7.1
Abood TV	1.5	2.1	1.0	2.0	1.1
Tanga TV	1.5	2.6	0.4	1.2	1.8

Table 3.8: Percentage of television viewers who watch each channel regularly (at least once a week) overall and across age lines

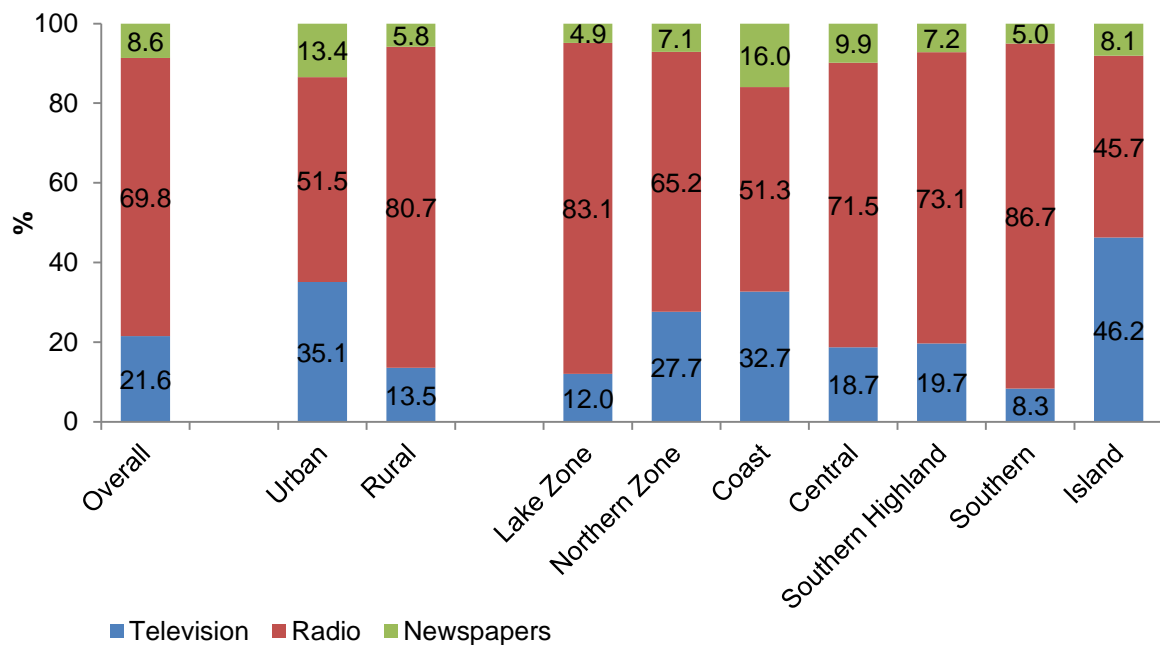
Television Brand	Overall Television viewers (n=842)	Age		
		Youth (n=466)	Middle-aged (n=260)	Mature Adults (n=89*)
TBC1 TV	81.0	60.7	68.7	75.5
ITV	76.2	65.0	61.7	54.6
Star TV	57.6	42.9	43.4	37.5
EATV	36.0	43.3	40.9	37.8
Channel 10	23.3	30.8	21.1	13.8
Clouds TV	12.6	15.2	11.0	7.1
Mlimani TV	10.2	7.1	8.9	10.8
DTV	8.6	9.0	5.1	7.8
TV Zanzibar	7.5	7.5	5.8	6.5
Abood TV	1.5	7.8	6.2	3.5
Tanga TV	1.5	6.0	6.0	4.6

### 3.2.2 Media consumption

Media consumption is different from reach in that consumption takes frequency of exposure into account. Daily usage for example will equate to at least twenty-eight occasions in which the media type is used within a four week period. Similarly, usage four to six times a week is estimated to be twenty occasions of exposure, while two to three times is more or less ten occasions, once a week is four occasions and less than once a week is estimated to be two occasions in a four week time period. Hence looking at proportional consumption of each media type based on the number of occasions of exposure, a slightly more accurate picture in terms of usage emerges.

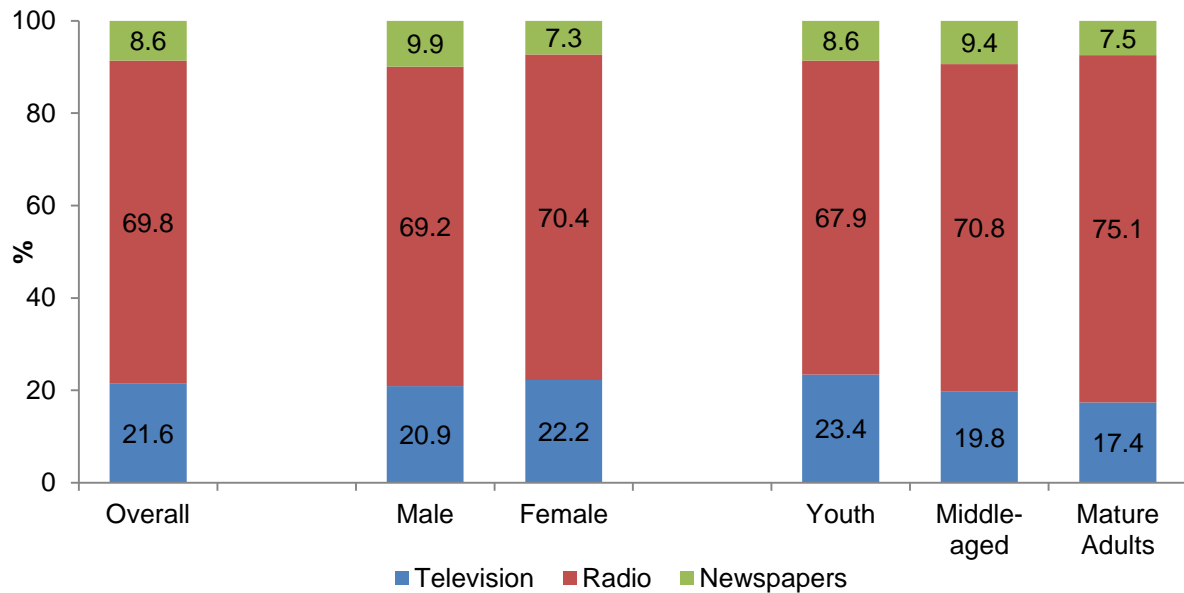
See Graph 3.3 illustrating overall media consumption in Tanzania. Proportionately, Tanzanians are exposed to radio communication (70%) most of the time, followed by television (21.6%) and lastly by newspapers (8.6%). In urban areas, television and newspapers have proportionately more exposure than rural areas, once again due to higher literacy levels, higher levels of education and affluence in the urban areas.

Graph 3.3: Proportion of media consumption overall and by area – weighted by number of occasions



No notable differences in the proportion of media consumption are evident across gender and age lines although there is a tendency towards less television exposure and more radio exposure as age increases. The proportion of media consumption across gender and age lines is illustrated in Graph 3.4.

Graph 3.4: Proportion of media consumption overall by gender and age – weighted by number of occasions

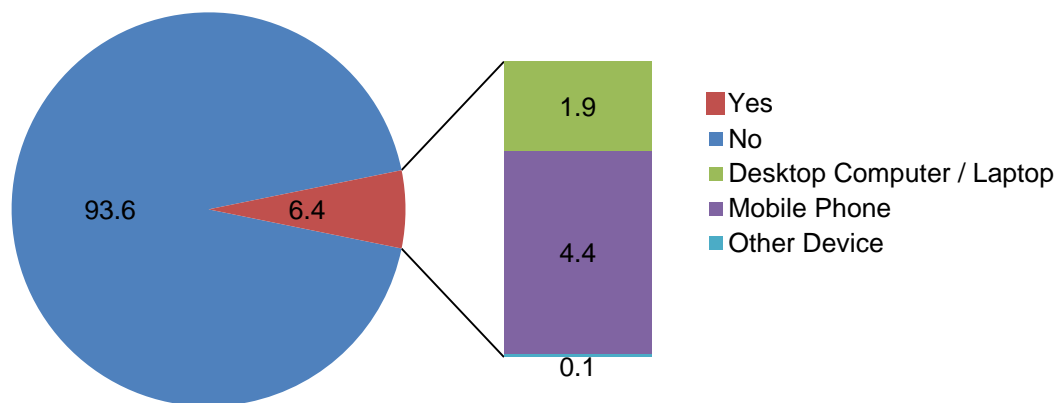


### 3.3 Internet behaviour

#### 3.3.1 Internet reach and channels

The lack of internet penetration is clearly evident in Graph 3.5. With a scant 6.4% of the sample surveyed indicating that they have access to the internet, this medium is unlikely as yet to have a significant impact on all but a few niche groups in Tanzanian society.

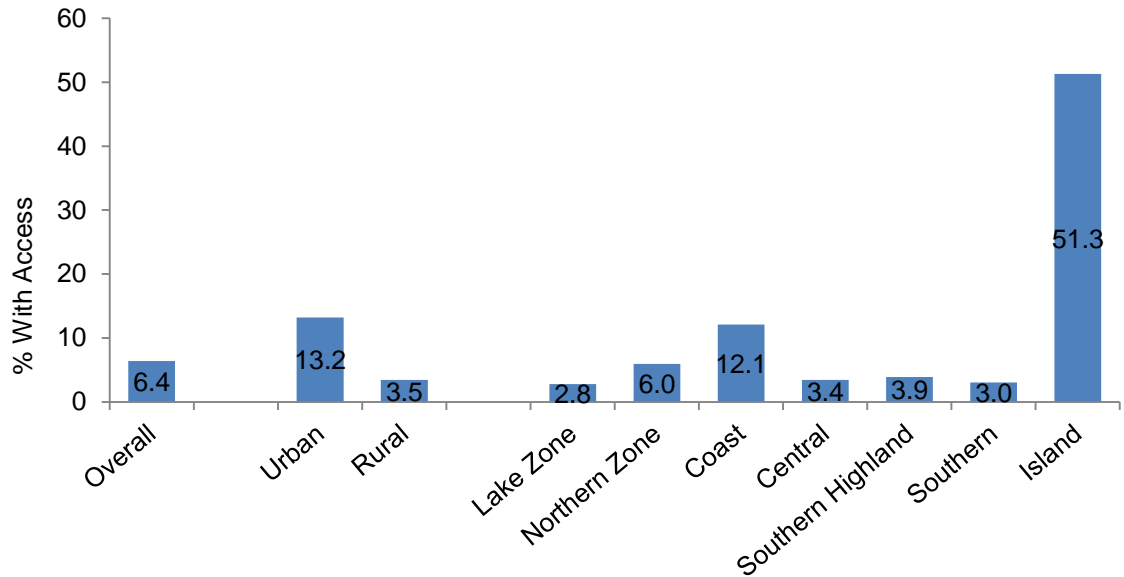
Graph 3.5: Proportion of internet penetration and device engaged for accessing the internet (n=2000)



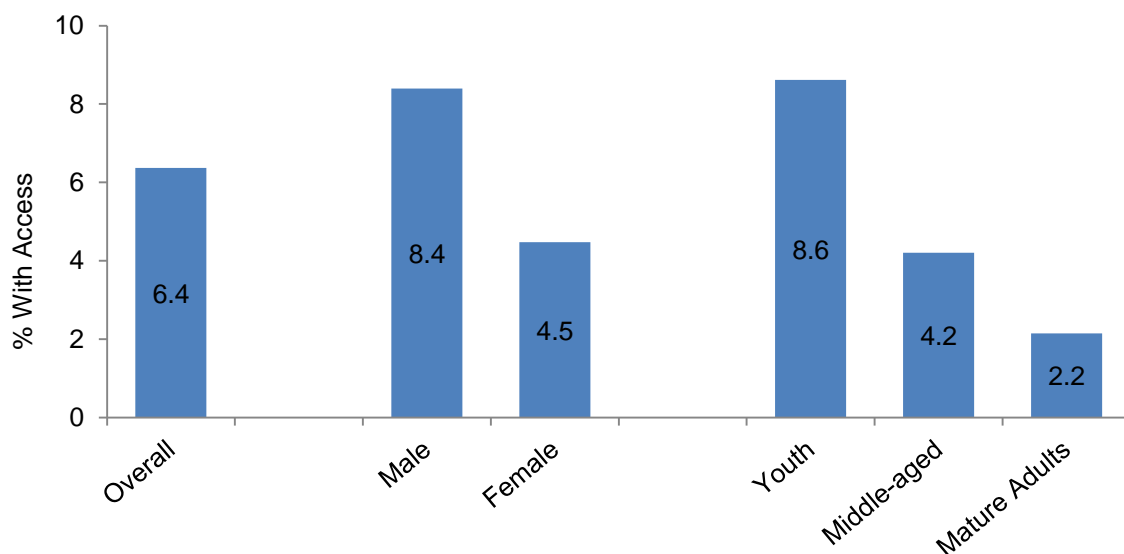
Graph 3.6 illustrates one such niche the Island region, although the small sample from that region suggests that this result be treated with caution. The Coast also stands out with above average levels of access, with 12.1% indicating that they do have internet access.

Unsurprisingly, internet penetration in urban areas (13.2%) is substantially higher than their rural counterparts (3.5%).

Graph 3.6: Percentage with internet access overall and by area (n=2000)



Graph 3.7: Percentage with internet access overall, by gender and age (n=2000)

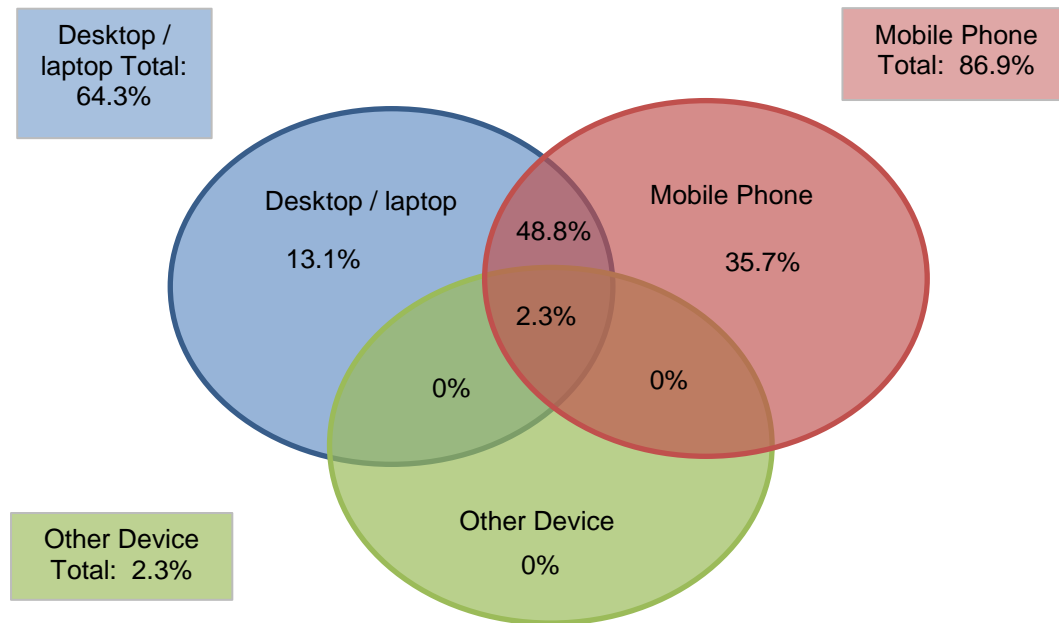


Graph 3.7 shows that the trend reported for television and newspapers is similar for internet access. Males are more likely to report having internet access than females (8.4% vs. 4.5%), and access also declines with each successive age group.

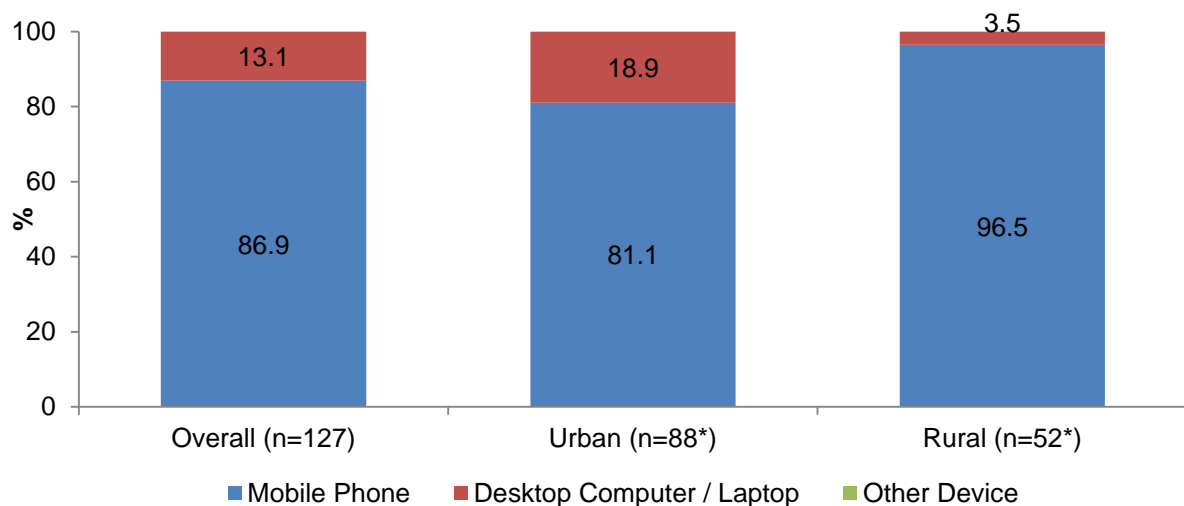


It is not desktop or laptop that proves to be the primary method for accessing the internet, but rather a mobile phone (see Figure 3.4), used by 86.9% of those who access the internet. For 35.7% of the internet users, the mobile is in fact their only method of access. A relatively high 48.8% use both their mobile and a desk or laptop computer in their internet activities.

Figure 3.4: Overall percentage reach and usage per device used for accessing the internet (n=127)



Graph 3.8: Percentage reach by device overall and by area



Graph 3.8 further emphasizes this point. If all other devices were removed, 86.9% would still be connected, via their mobile phone. Adding desktops and laptops to the mix only results in a further 13.1% gaining access, as the majority of those that use a desktop / laptop use this in addition to their mobile phone.

Tablets are still a rarity at this stage, and are only used in addition to other online devices by the very well connected and not as an only source of connectivity.

Figure 3.5: Percentage usage per device used for accessing the internet in urban areas (n=79\*)

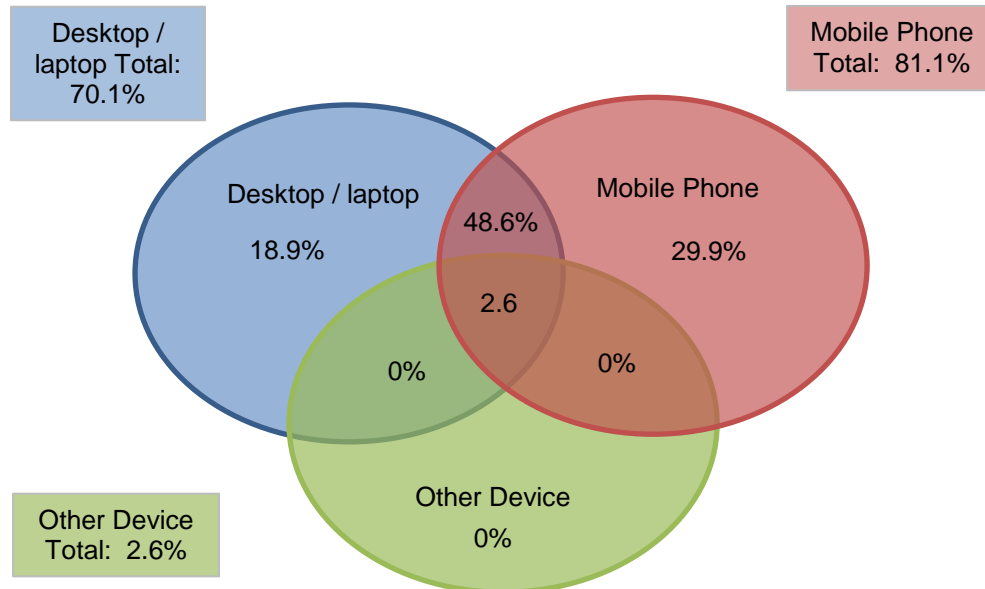
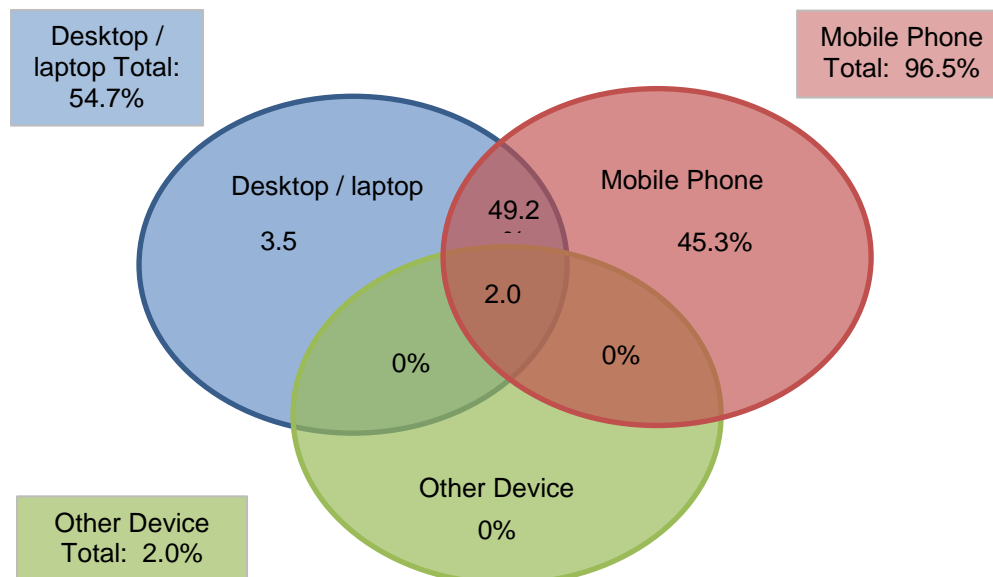
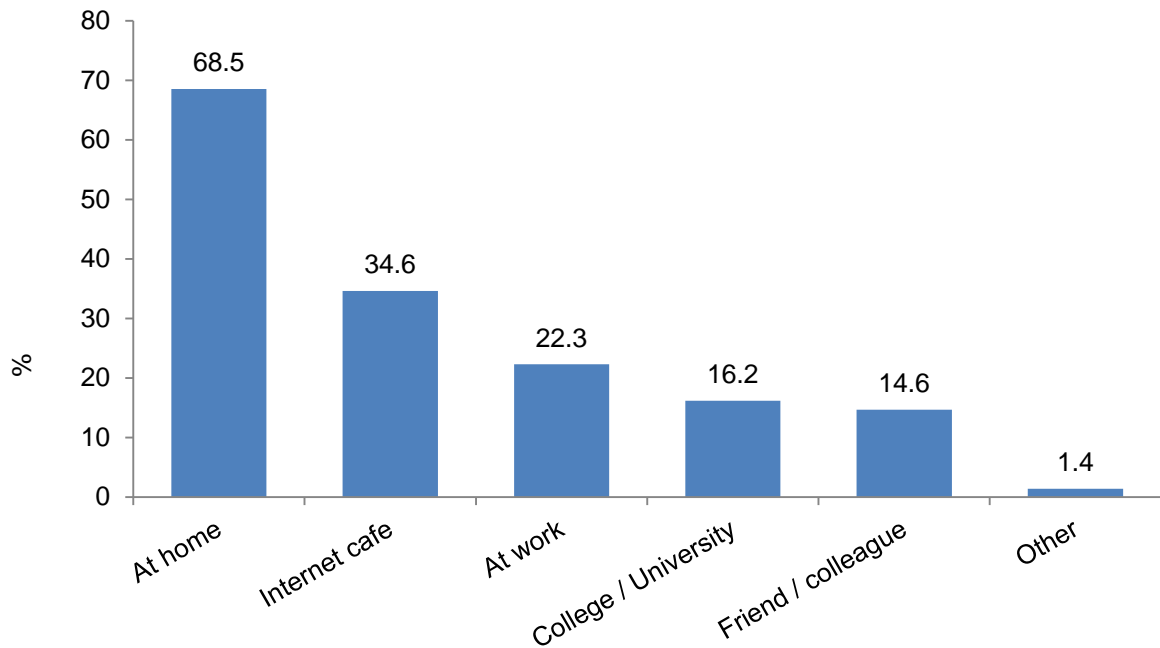


Figure 3.6: Percentage usage per device used for accessing the internet in rural areas (n=48\*)



\*Note: Interpret with caution due to small base size

Graph 3.9: Channel of access if using a desktop / laptop for internet connectivity (n=82\*)



As Graph 3.9 shows, for those who access the internet via a laptop or desktop, the most common channel of access is at home, with over two-thirds (68.5%) using this channel. While over a third of those accessing the internet via a computer, do so via internet cafés, places of study or employment are fairly unlikely to provide a core means of accessing the internet via this device (16.2% and 22.3% respectively).

**3.3.2 Internet activities**

By far the most common reason for connecting to the internet is Facebook with an overwhelming 71.9% listing this as one of the activities they engage in online. Of those using social networking, more than three quarters (79.5%) do so two to three times a week and close to a third (30.6%) will do so daily. By contrast, only 17.2% were likely to read current news and 13.4% to access a newspaper or magazine website.

Tanzanian blogs are popular, ranking as the fourth most frequent activity on the internet with 36% following a local blog. Those that do follow blogs tend to be avid followers, logging in at least a couple of times a week to catch up.

Graph 3.10: Internet activities amongst internet users (n=127)

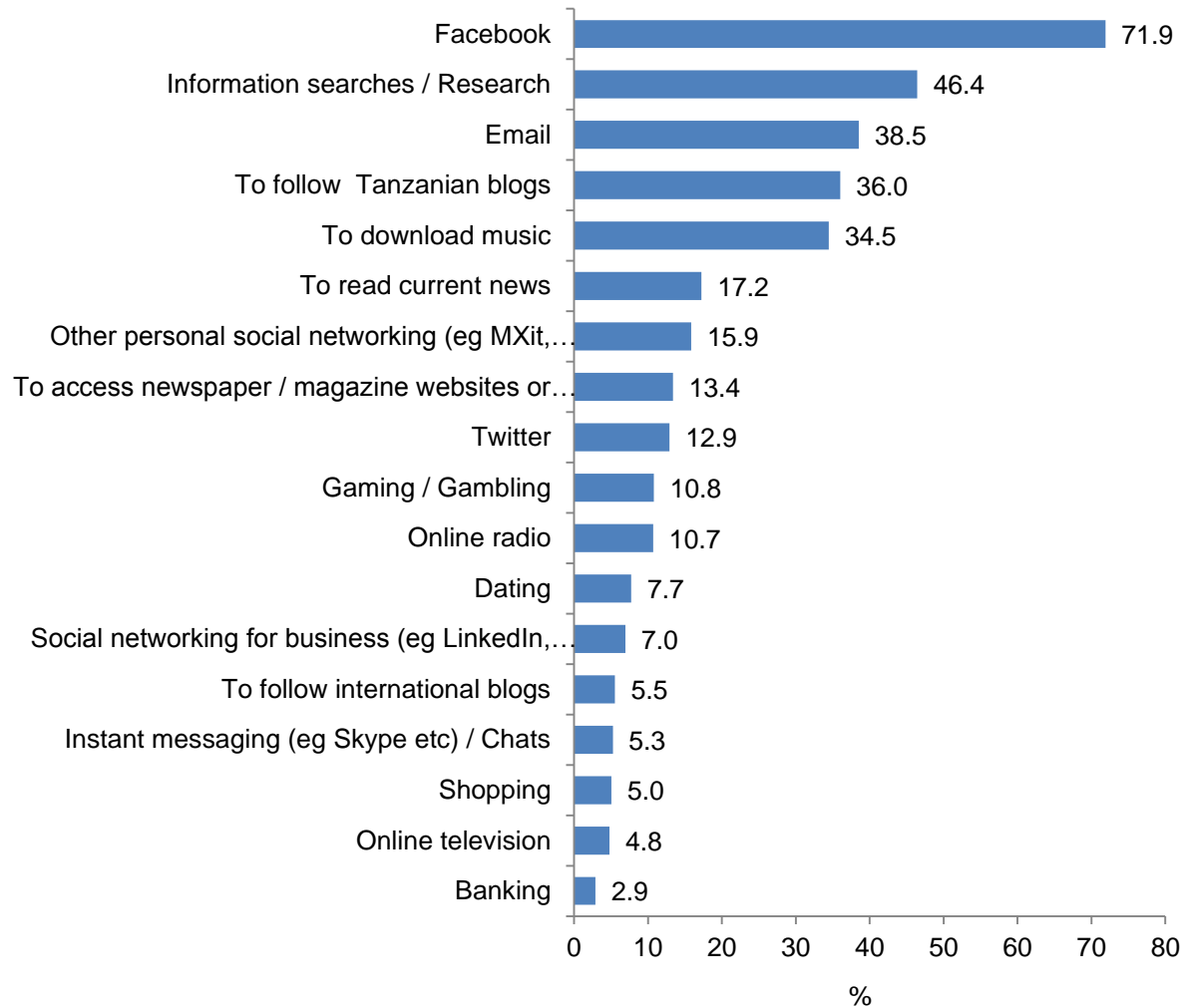
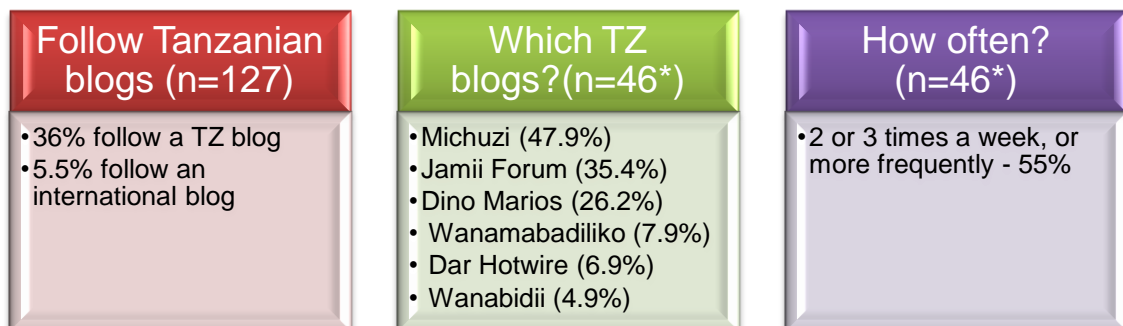


Figure 3.7: Behaviour around Tanzanian blogs

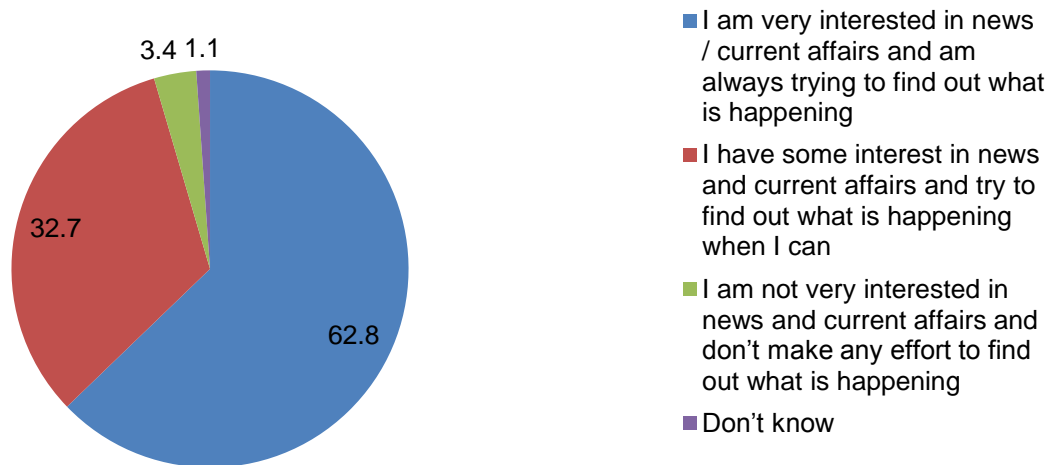


### 3.4 Perceptions of media

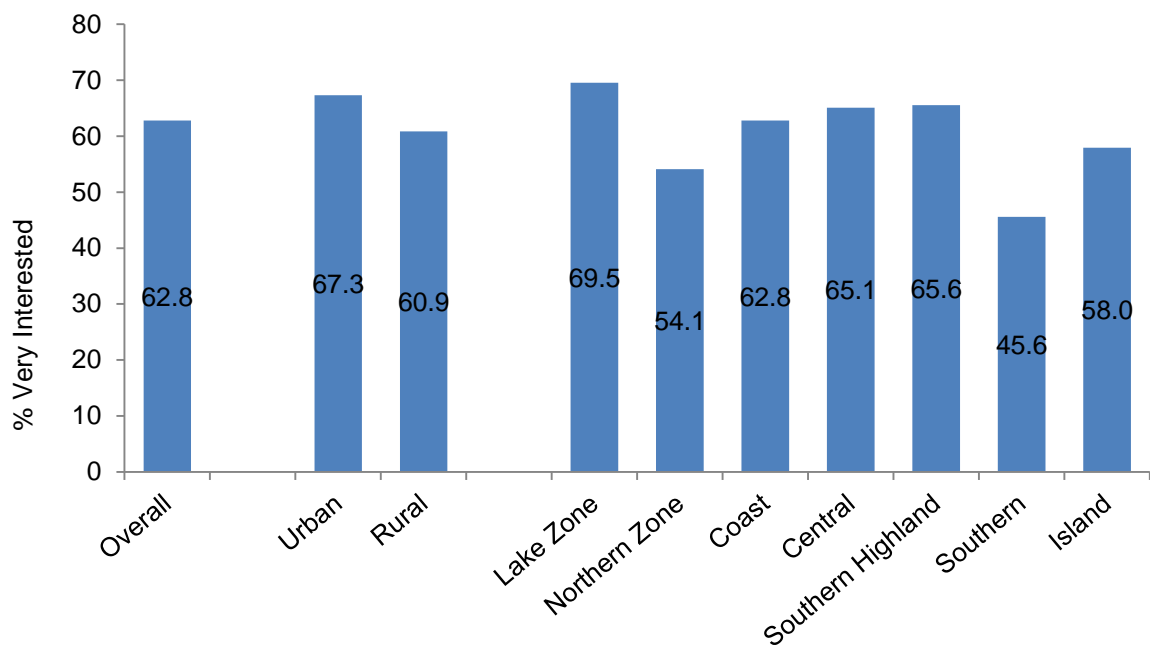
#### 3.4.1 Level of interest in news / current affairs

Despite the apparent limited time spent in catching up on the news in the various media channels, those surveyed are most likely to identify themselves as being very interested in the news (62.8%). Only a very small niche (3.4%) declared themselves to be disinterested in news or current affairs, so it is likely that there is a disconnect with the available media, rather than a nonchalant attitude in general.

Graph 3.11: Feelings about news amongst overall sample (n=2000)



Graph 3.12: Proportion that are 'very interested' in news / current affairs by region (n=2000)



Graph 3.12 does not point to particularly substantial differences on a regional basis. As could be expected, those living in urban areas are slightly more interested (67.3% vs. 60.9%).

More interestingly, the Lake Zone emerged as the region with the highest proportion of people who are very interested in news (69.5%), despite the fact that this region reported the lowest level of penetration by newspapers and television. This suggests that there is under-delivery in the region and that affordable, accessible news channels are likely to be met with interest. The reverse may be true for the Southern region. Those surveyed in this region reported the second lowest level of penetration, but here, apathy may well be a factor as the proportion very interested in the news from this region was notably low (45.6%).

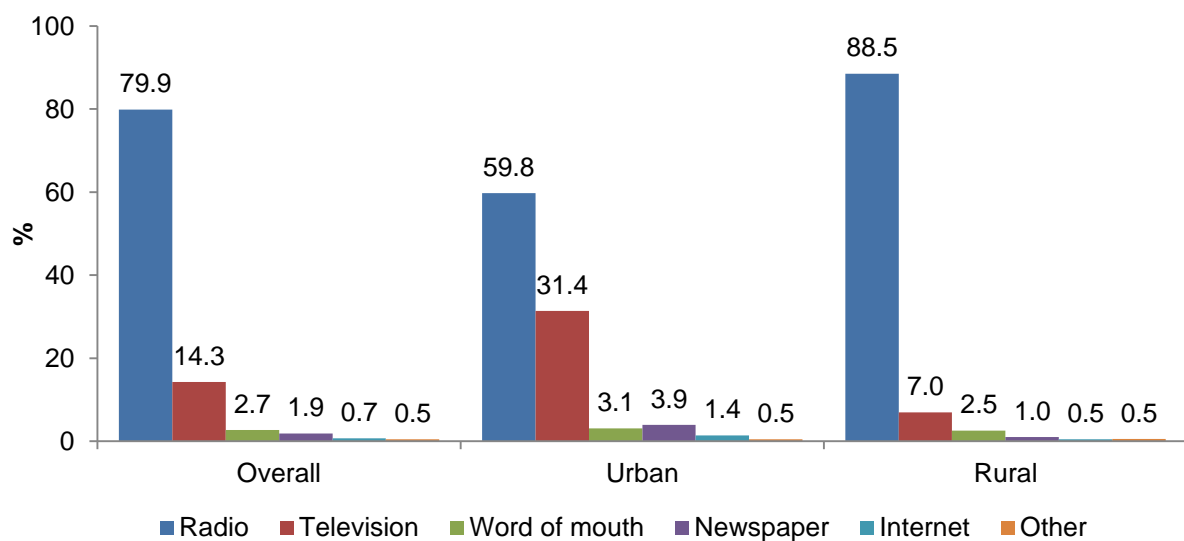
Interest was very consistent across age groupings while gender differences were small with males (66.1% very interested) showing only a marginally higher interest than females (59.7% very interested).

Unsurprisingly, interest in news and current affairs is highly correlated to level of education. Three quarters (74.0%) of tertiary educated Tanzanians displayed high interest in comparison to just overall a half (54.0%) of those with no formal education indicating they are very interested.

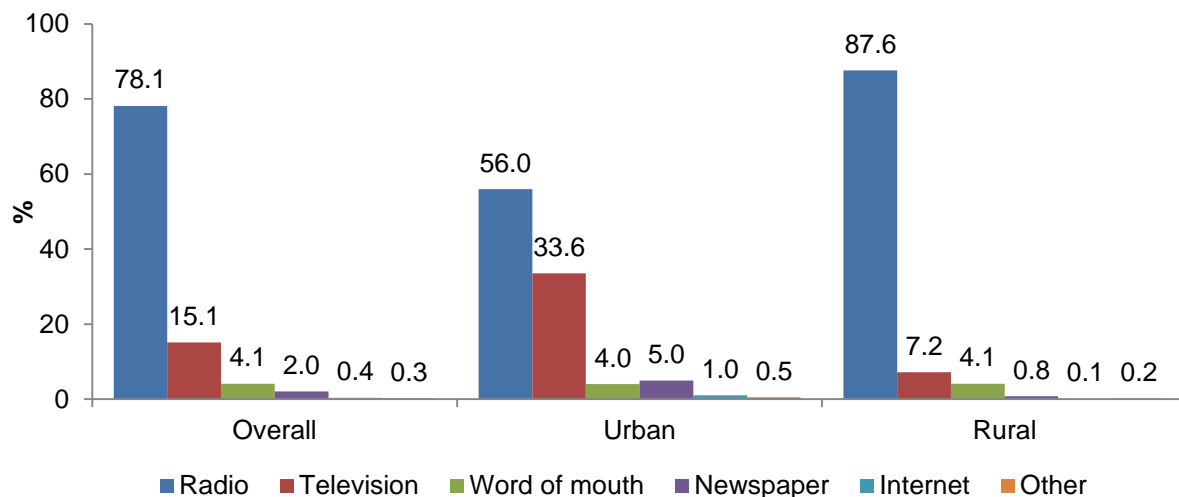
Graphs 3.13 and 3.14 reiterate how important a role radio plays in keeping the community informed in Tanzania. Whether it is general updates or specific information, this tends to be the source of choice.

There was some variation between urban and rural in this regard, with the rural communities and their limited access to television, newspapers and the internet becoming a captive audience for radio. Indeed newspapers hardly feature in their list of preferred sources, with word of mouth an even more commonly used source.

Graph 3.13: Preferred source for general news / current affairs, overall and by setting



Graph 3.14: Preferred source for information on a specific event, overall and by setting

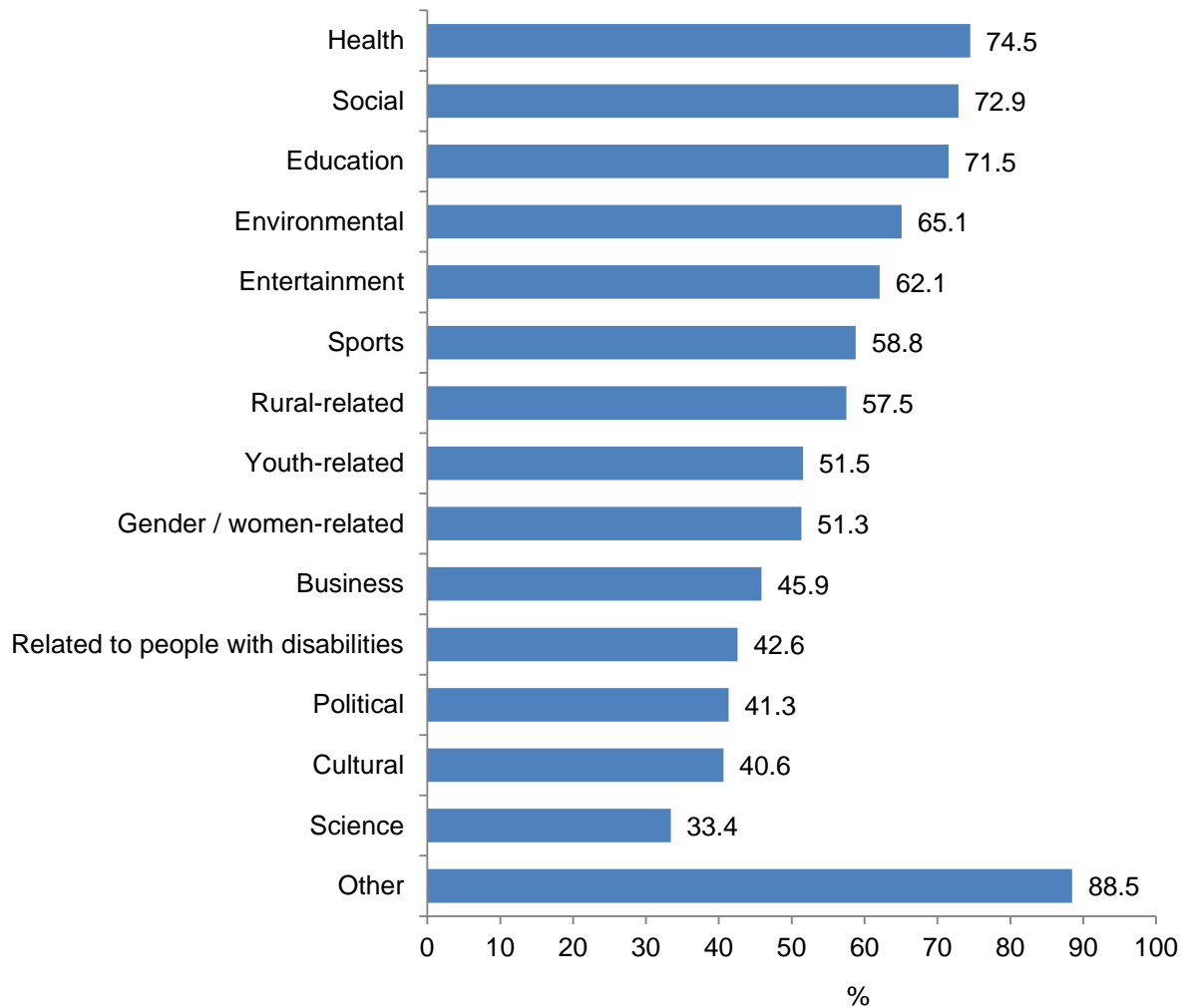


From Graph 3.15, it is clear that there is a great deal of interest around the topics of health (74.5%), education (71.5%) and social issues (72.9%). These issues are likely to have a direct bearing on the quality of life for many Tanzanians, and as such evoked a high level of interest. Environmental issues may not be as tangible to some, but this is also a hot topic overall with two-thirds of Tanzanians highlighting this to be a topic of interest.

An attraction to less serious topics such as sport (58.8%) and entertainment (62.1%) is evident for many Tanzanians. An interest in youth-related (51.5%) and gender / women-related topics (51.3%) is not limited those particular audiences (although elevated), but seems to evoke curiosity amongst the general audience.

By contrast, science was the topic with the lowest level of appeal, with only a third of those sampled rating this as a very interesting topic. Cultural issues also reported a fairly moderate level of interest, and politics, a topic that features very prominently in news reporting, was the third least interesting (41.3%).

Graph 3.15: Proportion 'very interested' in specific topics

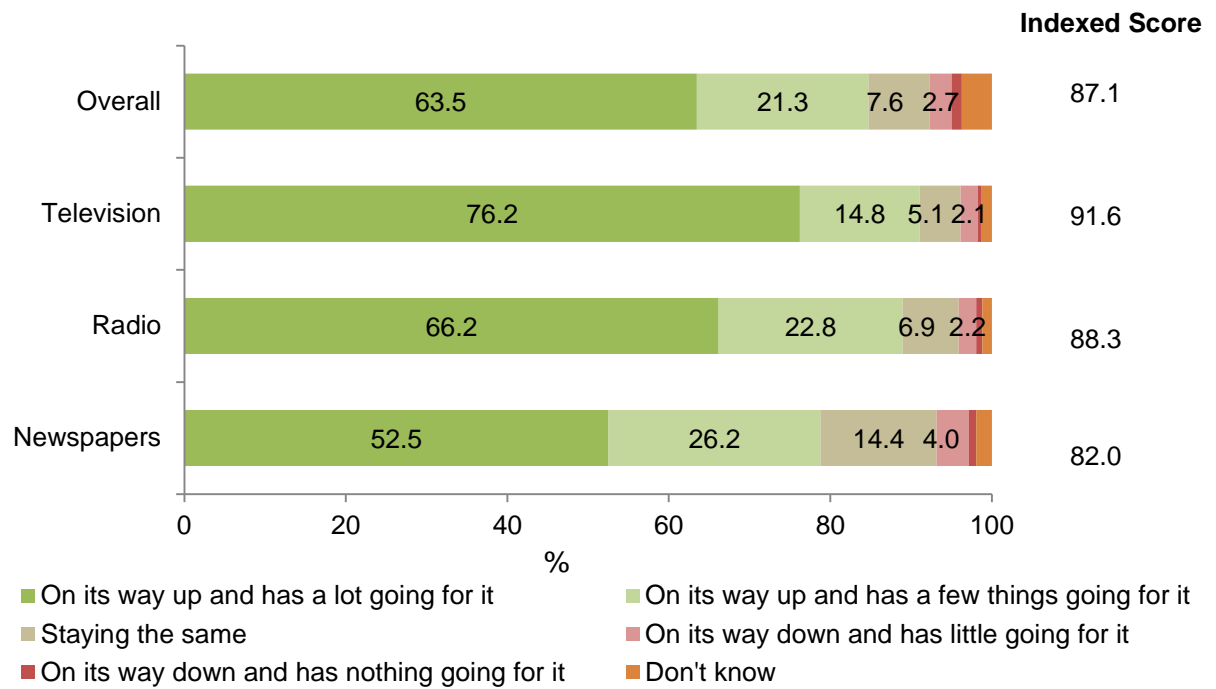


### 3.4.2 Overall Impressions

The general public were asked about their top of mind impressions of Tanzanian media overall as well as television, newspapers and radio specifically. They had to indicate whether they felt the media has been improving or declining over time. An index was created to summarize these impressions. The index ranges from 0-100, with scores closer to 100 showing more positive top of mind impressions overall, and of each media type. Graph 3.16 illustrates the results at an overall level showing the distribution of responses and the positivity index. It is clear that in general Tanzanians are very positive and have a clear perception that the Tanzanian media is improving. This is reflected in the 87.1% score. They are most optimistic about television which obtained a baseline score of 91.6% and least positive about the direction newspapers are taking (82.0%), although impressions for this media type were still very good.



Graph3.16: Overall impressions of Tanzanian media and the media positivity index



Graph 3.17 displays the positivity index by setting and region. At an overall level there are few differences apart from the Southern region, which is substantially less positive (75.7%).

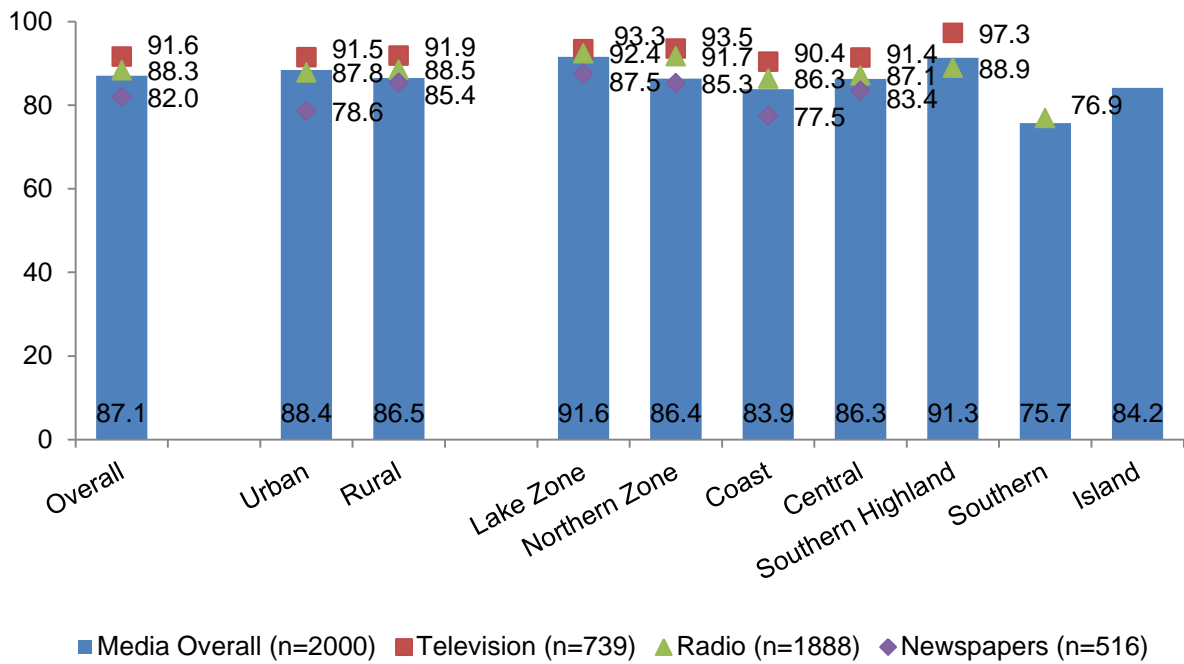
When looking at how optimistic Tanzanians are about improvements of each media type, more interesting results emerge with respect to impressions of newspaper as a medium. Tanzanians in urban areas are less optimistic than their rural counterparts (78.6% vs. 85.4%) about the improvement of local newspapers. Similarly, coastal Tanzanians (77.5%) are decidedly less optimistic.

Impressions about television and radio are very similar and generally positive across region and setting. It is only in the Southern region where residents are significantly more negative about radio (76.9%).

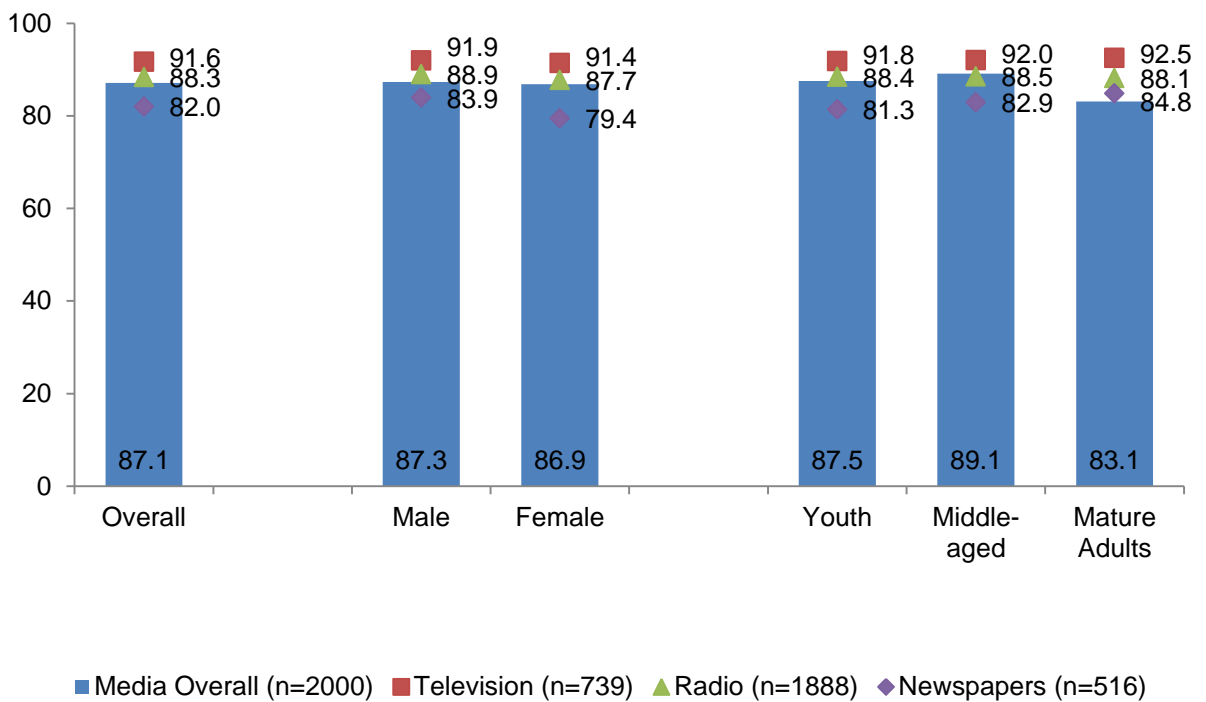
No significant differences are evident across age and gender lines. Although females (79.4%) tend to be slightly less optimistic about newspapers than males (83.9%), this difference is marginal. See Graph 3.18 for the positivity index results by age and gender.

Graph 3.17: Positivity index for Tanzanian media by region and setting.

Note: Results excluded if base <80.



Graph 3.18: Positivity index for Tanzanian media by region and setting



### 3.4.3 Quality of media

The general public was presented with a list of descriptions from which they had to select those that they felt described Tanzanian media overall, as well as each media type. A quality index was calculated from the results by determining the average percentage associations across the following attributes:

- Trustworthy
- Independent
- Transparent
- Vibrant
- Top Quality
- Professional
- Objective
- Diverse Content
- Critical Thinking
- Accurate

The index thus ranged from 0 to 100 with 0 indicating very poor quality and 100 excellent quality. Graph 3.19 illustrates the quality index results for Tanzanian media overall and for each media type.

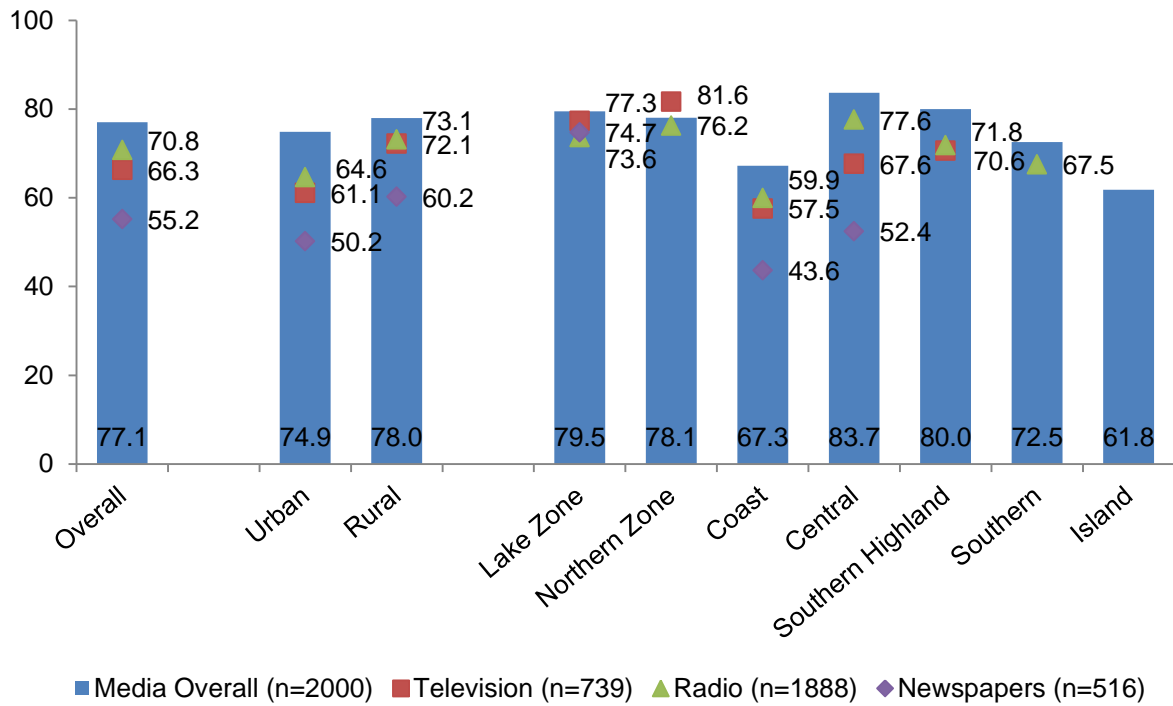
Although the quality index was acceptable at an overall level (77.1%), when calculated for each media type clear distinctions emerged. Newspapers achieved the lowest score of 55.2%, followed by television, with a better score of 66.3%, and finally radio which achieved the highest baseline score of 70.8%. Although newspapers were rated by the more affluent and educated Tanzanians, who are likely to be more critical, it is still a reflection of the under-performance of this media when it comes to quality expectations. The poor quality of newspapers may be the reason for the lower than expected proportions of tertiary educated Tanzanians using the local media type. It is likely they are turning to international media to keep them updated on news.

Distinctions across urban and rural lines showed that urban Tanzanians are far more critical than their rural residents, with significantly lower scores for urban than rural across all media types. Regional differences must be treated with caution given the low readership at this level but it is clear that the quality indices calculated for the Coastal area are lower than other regions. The Coastal index for newspapers in particular illustrates a below average quality for this medium. Given that this region is also more affluent and urban than other regions it is also not surprising that it has a lower score given the urban and rural distinctions.

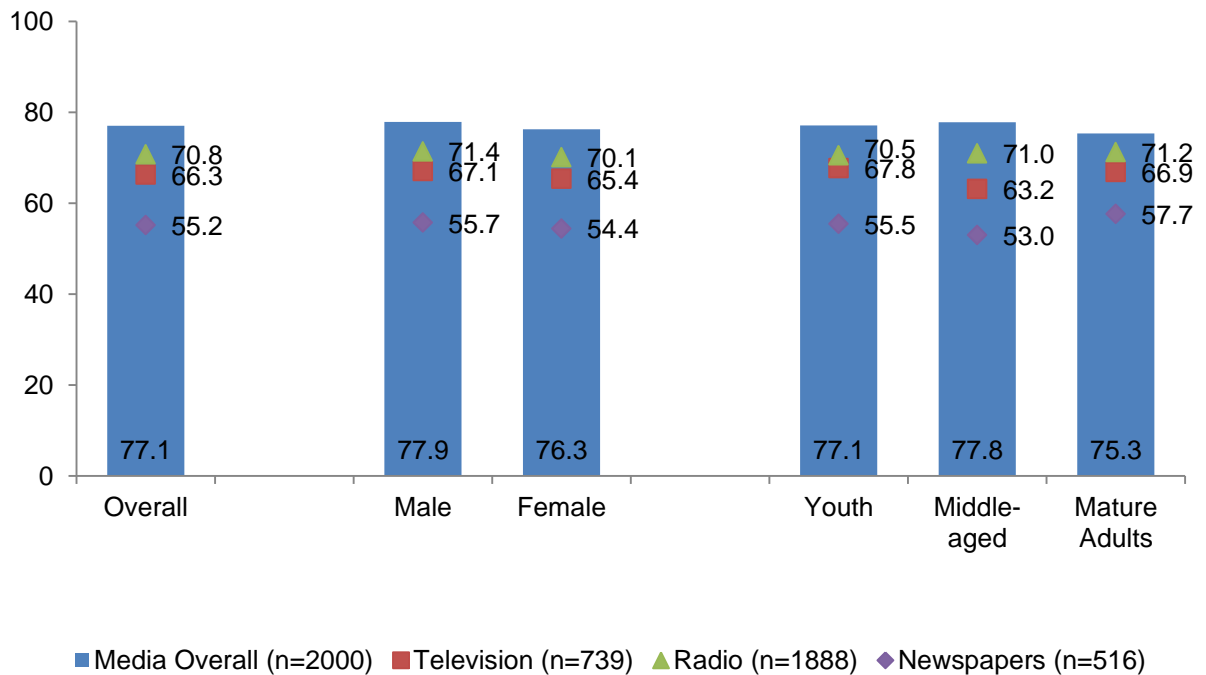
No substantial differences in the quality index were obvious across gender and age lines (see Graph 3.20).

Graph 3.19: Quality index for Tanzanian media by region and setting

Note: Results excluded if base <80.



Graph 3.20: Quality index for Tanzanian media by age and gender



In order to understand the elements of quality impacting perceptions, the proportion of associations with each quality attribute must be examined, as well as the importance of each element in driving overall media perceptions. Table 3.9 illustrates the importance rankings of

each quality attribute. Given the current status of media in Tanzania aspects such as trustworthiness, independence, accuracy and transparency are the most important qualities to driving overall perceptions. Improvements on these dimensions will have the biggest impact on overall public media perceptions. Elements like diverse content and professionalism are still important but given that the fundamentals are not met adequately yet, these aspects tend to move down in importance until performance is acceptable. Elements such as being vibrant and showing critical thinking, which are top of the range quality attributes, are of less importance while other aspects need to be addressed first.

Table 3.9: Importance and ranking of the quality attributes which drive overall media perceptions in Tanzania

Quality Attributes	Importance Ranking
Trustworthy	HIGH – 1
Independent	HIGH – 2
Accurate	HIGH – 3
Transparent	HIGH – 4
Professional	MIDDLE- 5
Diverse Content	MIDDLE- 6
Vibrant	LOW – 7
Objective	LOW – 8
Critical Thinking	LOW – 9
Top quality	LOW - 10

Given the importance, performance needs to be reviewed in order to highlight current strengths and weaknesses, so interventions can be designed for the weak areas while other aspects can be maintained and monitored. Graphs 3.21-3.23 illustrate the priority areas taking both importance and performance into consideration, with the box depicting ‘Weaknesses’ being the area that requires priority action. If an aspect has middle to high importance and performance is below 70%, it is classified as a weak area, while if performance is greater than 70% it is a strength. If the importance is low, however, even if performance is greater than 70%, it would not be considered a strength as the aspect does little to drive overall perceptions. Hence, such elements would simply be maintained. If performance is below 70%, it would not be considered a weakness as the area is not important. Such aspects would be closely monitored rather than have large amounts of resources spent to improve performance.

Both television and radio can boast being trustworthy and transparent as strengths although there is still room for improvement. In addition to these two attributes, radio has accuracy and independence as strong performing areas while these are weak points for television and newspapers. Professionalism and diversity of content are weak areas across all three media types. Newspapers, unlike the other two media have the fundamental elements of trustworthiness and transparency as weak areas.

Graph 3.21: Quality attribute priority matrix for television

<p><b>Weaknesses</b> (middle to high importance and low performance &lt;70%)</p> <p>Independent (67.3%)          Accurate (66.5%)          Professional (63.3%)          Diverse content (65.5%)</p>	<p><b>Strengths</b> (middle to high importance and high performance &gt;70%)</p> <p>Trustworthy (86.4%)          Transparent (73.1%)</p>
<p><b>Monitor</b> (low importance and low performance &lt;70%)</p> <p>Objective (46.2%)          Critical thinking (62.1%)          Top quality (58.4%)</p>	<p><b>Maintain</b> (low importance and high performance &gt;70%)</p> <p>Vibrant (74.1%)</p>

Graph 3.22: Quality attribute priority matrix for radio

<p><b>Weaknesses</b>(middle to high importance and low performance &lt;70%)</p> <p>Professional (64.5%)          Diverse content (65.3%)</p>	<p><b>Strengths</b> (middle to high importance and high performance &gt;70%)</p> <p>Trustworthy (90.2%)          Independent (78.5%)          Accurate (75.7%)          Transparent (76.0%)</p>
<p><b>Monitor</b> (low importance and low performance &lt;70%)</p> <p>Objective (52.0%)          Top quality (57.8%)</p>	<p><b>Maintain</b> (low importance and high performance &gt;70%)</p> <p>Vibrant (77.1%)          Critical thinking (70.5%)</p>

Graph 3.23: Quality attribute priority matrix for newspapers

<p><b>Weaknesses</b> (middle to high importance and low performance &lt;70%)</p> <p>Trustworthy (68.5%)          Independent (62.2%)          Accurate (54.4%)          Transparent (61.3%)          Professional (51.9%)          Diverse content (57.5%)</p>	<p><b>Strengths</b> (middle to high importance and high performance &gt;70%)</p>
<p><b>Monitor</b> (low importance and low performance &lt;70%)</p> <p>Vibrant (59.2%)          Objective (42.6%)          Critical thinking (50.8%)          Top quality (43.4%)</p>	<p><b>Maintain</b> (low importance and high performance &gt;70%)</p>

### 3.4.4 Media Coverage

Media coverage encompasses the various ‘voices’ of segments within the Tanzanian market such as the youth, women, the disabled etc. and whether these segments have the right amount of coverage. In addition, the coverage of local, national and international issues was investigated.

An index was calculated for both of these aspects. The index ranges from -100 to +100 where -100 indicates too little coverage, 0 signifies just the right amount of coverage and +100 is too much coverage. Graph 3.24 illustrates the coverage index for the various voices in the Tanzanian public. It is clear that the public agree that politics, primarily the voice of the ruling party (39.1) has too much coverage in the media. ‘Voices’ such as the rural-Tanzanian (-16.4), the disabled (-15.6) and local governments (-12.3) are perceived to have less coverage than they deserve. All other ‘voices,’ although they may have marginally more or less coverage than they deserve, are perceived to be very close to gaining the right amount of coverage in the media.

Looking at the media coverage index by gender, setting and age (see Table 3.10 and 3.11), no substantial differences emerge apart from opinions regarding the coverage of youth and women where urban Tanzanians perceive there to be more coverage of these voices than their rural counterparts. Women are of the opinion that voices of the women get more coverage than what is reasonable while men feel that these voices get just the right amount of media coverage.

Graph 3.24: Coverage index for the various voices among the Tanzanian public

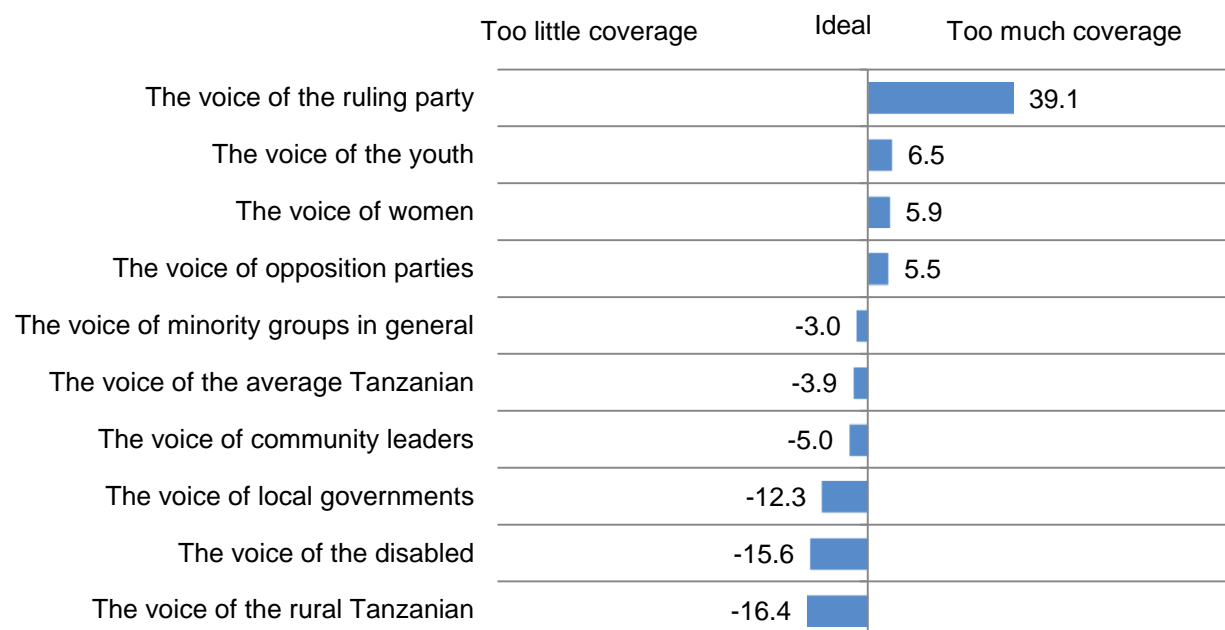


Table 3.10: Coverage index for the various voices among the Tanzanian public split by setting and gender

Tanzanian Voices	Overall General Public (n=2000)	Setting		Gender	
		Urban (n=600)	Rural (n=1400)	Male (n=967)	Female (n=1033)
The voice of the ruling party	39.1	39.0	39.2	41.0	37.3
The voice of the youth	6.5	14.9	2.9	5.1	7.8
The voice of women	5.9	15.2	1.9	0.7	10.6
The voice of opposition parties	5.5	6.5	5.1	4.8	6.1
The voice of minority groups in general	-3.0	-0.2	-4.2	-1.4	-4.5
The voice of the average Tanzanian	-3.9	-3.0	-4.3	-4.1	-3.7
The voice of community leaders	-5.0	-1.8	-6.4	-6.9	-3.2
The voice of local governments	-12.3	-12.8	-12.1	-11.9	-12.8
The voice of the disabled	-15.6	-17.4	-14.8	-15.0	-16.1
The voice of the rural Tanzanian	-16.4	-16.6	-16.3	-15.5	-17.2

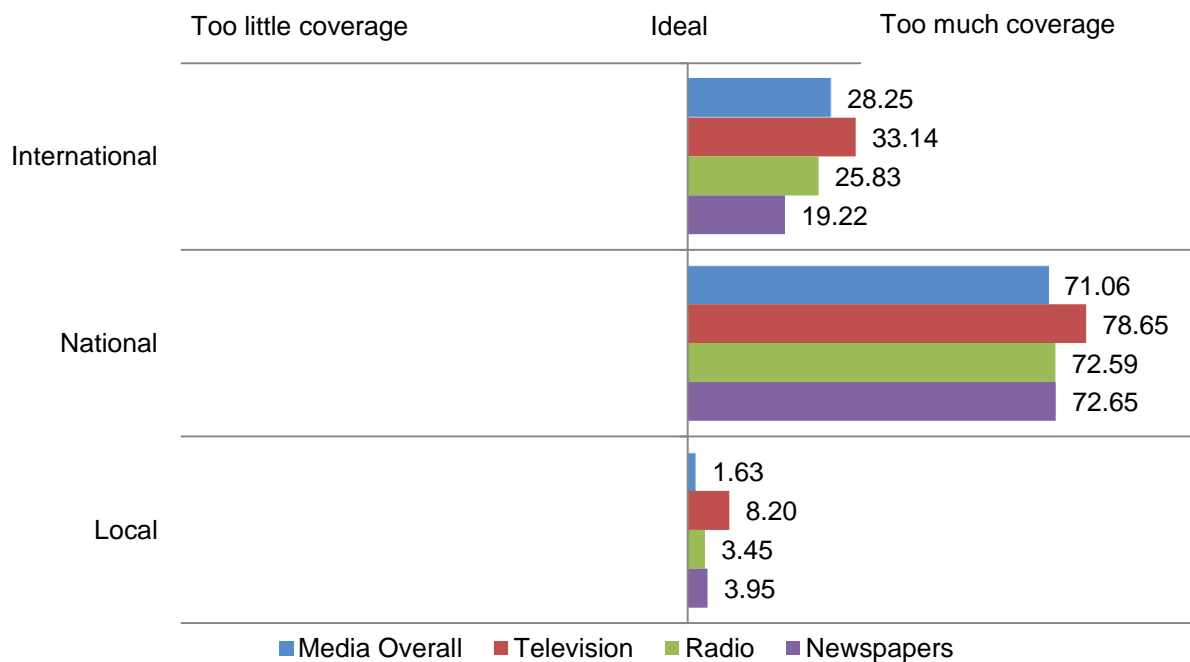


Table 3.11: Coverage index for the various voices among the Tanzanian public split by age

Tanzanian Voices	Overall General Public (n=2000)	Age		
		Youth (n=1062)	Middle-aged (n=632)	Mature Adults (n=254)
The voice of the ruling party	39.1	38.1	40.3	43.4
The voice of the youth	6.5	8.8	3.3	5.3
The voice of women	5.9	6.5	4.8	7.0
The voice of opposition parties	5.5	6.8	5.4	1.6
The voice of minority groups in general	-3.0	-5.3	-0.2	-0.2
The voice of the average Tanzanian	-3.9	-3.7	-2.6	-11.0
The voice of community leaders	-5.0	-6.0	-5.1	-2.7
The voice of local governments	-12.3	-12.6	-13.9	-5.5
The voice of the disabled	-15.6	-17.5	-14.3	-12.4
The voice of the rural Tanzanian	-16.4	-20.2	-12.1	-14.5

The coverage index for local, national and international topics of interest (see Graph 3.25) indicated that local issues were getting close to the ideal amount of coverage. National issues dominated media content and international issues were also perceived to have more coverage than desired.

Graph 3.25: Coverage index for local, national and international news among the Tanzanian public



At a regional level some interesting differences were apparent (see Table 3.12). The Lake Zone (-8.8) and Central regions (-6.4) felt an under-coverage of local news. In the Lake Zone this was in particular with regards to radio and television coverage while in the Central region it was mainly radio which fell short on local issues.

Table 3.12: Coverage index for local, national and international news among the Tanzanian public split by region

Media coverage	Region						
	Lake Zone	Northern Zone	Coast	Central	Southern Highland	Southern	Island
<b>Overall</b>	<b>n=580</b>	<b>n=235</b>	<b>n=315</b>	<b>n=359</b>	<b>n=268</b>	<b>n=184</b>	<b>n=60*</b>
International	37.1	23.7	22.1	30.2	28.1	19.2	8.6
National	68.4	78.0	58.6	73.6	76.6	72.2	89.0
Local	-8.8	9.7	3.5	-6.4	10.8	7.3	50.4
<b>Newspapers</b>	<b>n=68</b>	<b>n=95</b>	<b>n=160</b>	<b>n=139</b>	<b>n=89</b>	<b>n=57</b>	<b>n=32</b>
International	**	28.1	11.0	18.3	26.0	**	**
National	**	82.6	65.0	71.6	76.0	**	**
Local	**	13.4	15.1	-2.8	-5.3	**	**
<b>Radio</b>	<b>n=563</b>	<b>n=228</b>	<b>n=285</b>	<b>n=352</b>	<b>n=258</b>	<b>n=184</b>	<b>n=60*</b>
International	40.6	13.4	11.5	30.1	20.2	18.0	22.8
National	71.8	73.6	59.2	78.6	77.5	73.0	81.3
Local	-10.8	12.8	15.4	-5.7	14.0	7.2	43.8
<b>Television</b>	<b>n=111</b>	<b>n=137</b>	<b>n=202</b>	<b>n=159</b>	<b>n=120</b>	<b>n=53</b>	<b>n=60*</b>
International	44.0	36.3	25.2	32.4	43.9	**	21.4
National	83.3	87.7	67.2	81.0	75.9	**	83.3
Local	-25.1	17.0	12.8	4.7	10.6	**	51.6

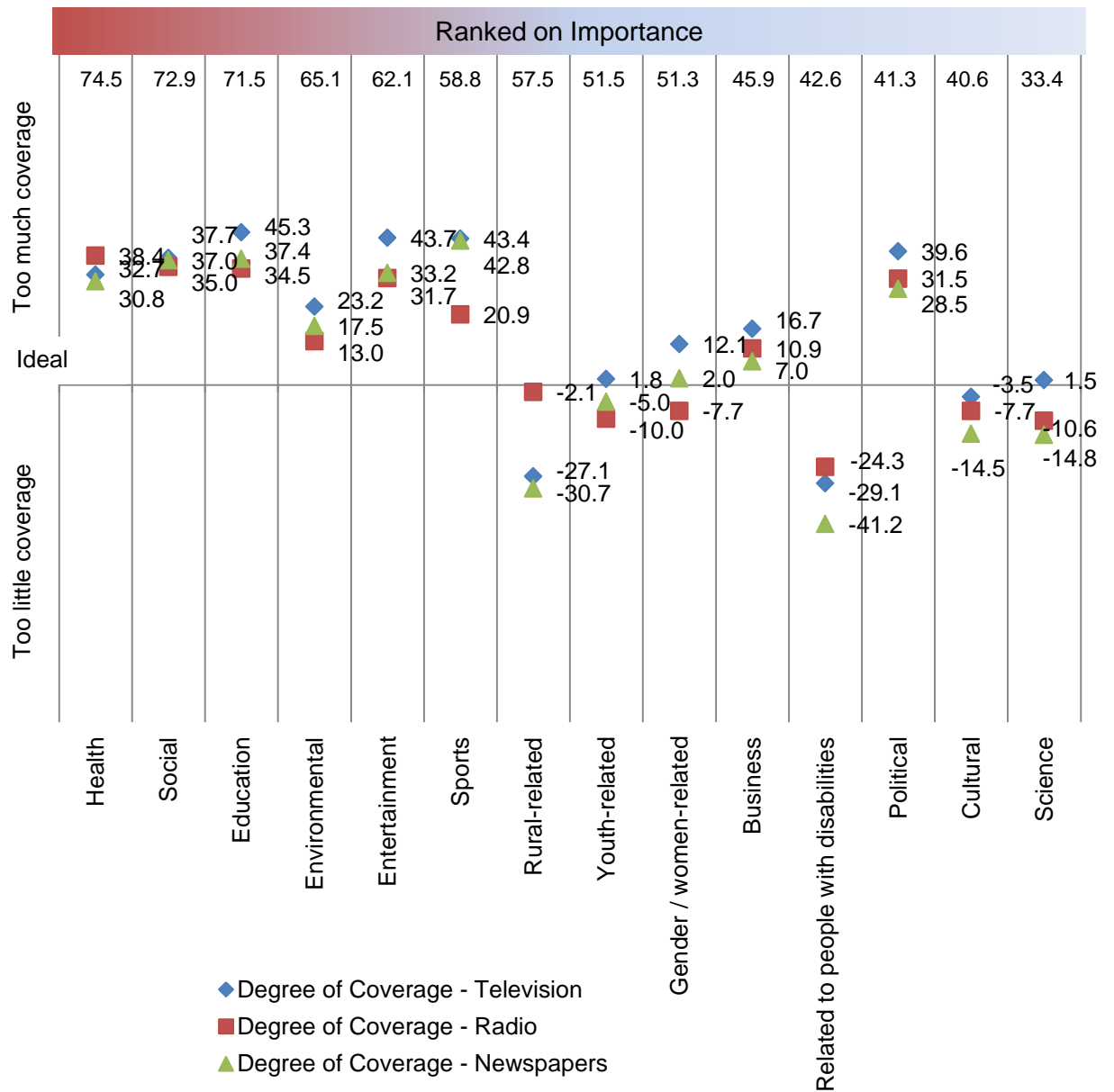
\*interpret with caution; \*\*Sample too small for reliable data

### 3.4.5 Media Content

The general public was probed on how well Tanzanian media covered a diverse content of topics. An index for the diversity of content was created which ranged from -100 to +100, where -100 indicated under-coverage, 0 an ideal amount of coverage and +100 more coverage than expected.

Media reporting on news related to people with disabilities (see Graph 3.26) is found to have the least amount of coverage, in spite of a high level of interest in the topic. Newspapers in particular are perceived to under-report topics related to people with disabilities. Rural-related news is the second most under-reported content but only on television and in newspapers. Rural issues are sufficiently covered by radio. Science and cultural issues would also benefit from more coverage although interest in these areas is the lowest. The more popular topics such as health, social and entertainment do get sufficient coverage. Media content leans a bit too heavy on the political side, which is an area of little interest to most.

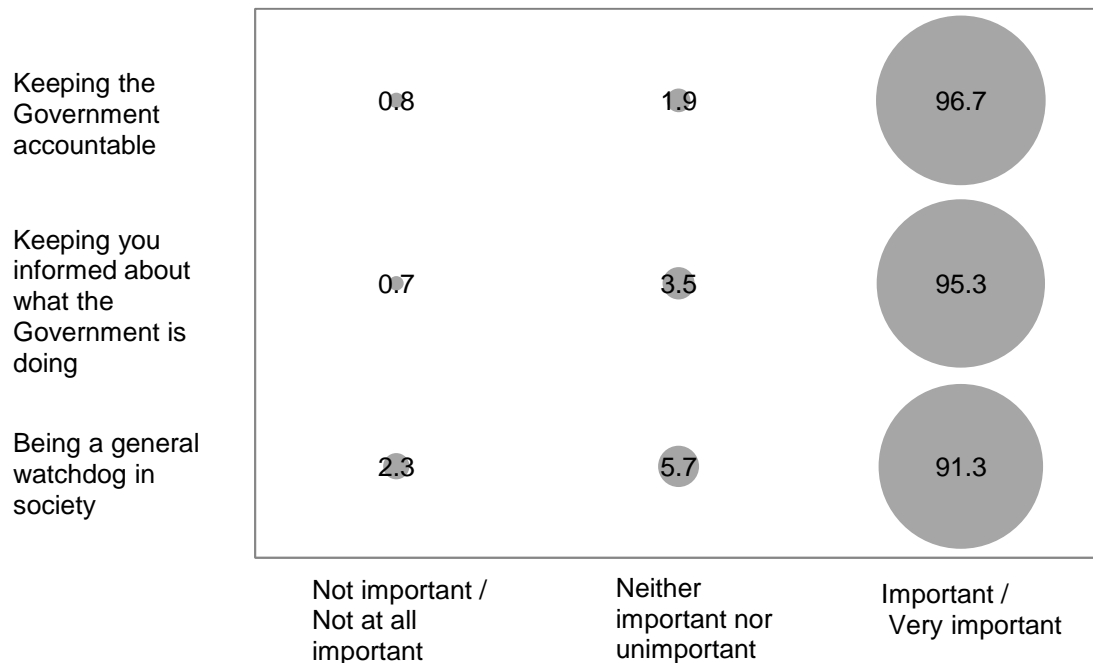
Graph 3.26: Diversity of content index for various topics among the Tanzanian public



### 3.4.6 Role of the Media in creating Accountability

Viewpoints regarding the importance of the media’s role in creating accountability were unanimous – both at an overall level and across all demographic segments. Tanzanians believe that the media has to keep the Government accountable, should keep the citizens informed about what the Government is doing and should play the role of ‘watchdog’ in society (see Graph 3.27).

Graph 3.27: Percentage agreement on the importance of the media’s role in creating accountability



When probed on how successful the media is in playing their part, the Tanzanian public was very positive. An index was created regarding the perceived success of the media in creating accountability. The index ranged from 0 to 100 where 0 would mean unsuccessful and 100 would be very successful. The resulting index was in the seventies for all three accountability statements. Table 3.13 illustrates the index for each attribute at an overall level as well as for setting, gender, age and region.

Table 3.13: Index for success of the media in creating accountability by gender, age, education and region

Demographics	Index		
	Keeping the Government accountable	Keeping you informed about what the Government is doing	Being a general watchdog in society
<b>OVERALL (n=2000)</b>	79.0	77.2	73.5
<b>Setting</b>			
Urban (n=600)	80.0	78.9	74.5
Rural (n=1400)	78.6	76.5	73.1
<b>Gender</b>			
Male (n=967)	78.6	77.0	73.3
Female (n=1033)	79.4	77.4	73.7
<b>Age</b>			
Youth (n=1062)	78.3	76.1	72.5
Middle-aged (n=632)	80.8	79.0	75.4
Mature adults (n=254)	79.0	77.8	73.6
<b>Region</b>			
Lake Zone (n=580)	79.1	76.5	70.1
Northern Zone (n=235)	77.1	75.0	73.3
Coast (n=315)	77.3	76.3	73.1
Central (n=359)	80.7	77.7	74.6
Southern Highland (n=268)	81.6	81.9	80.1
Southern (n=184)	77.4	76.0	75.4
Island (*n=60)	78.4	78.0	67.6

\*interpret with caution due to small base

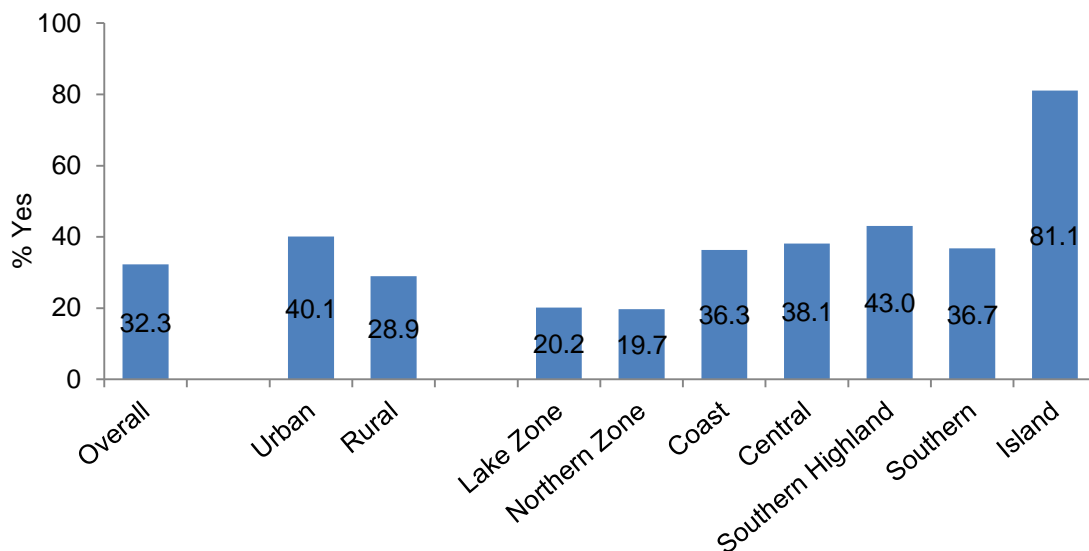
### 3.4.7 Action taken in response to media publications

Apart from gaining an understanding of the perceptions of the public regarding the role of the media in creating accountability, an understanding of the impact the media had in generating action was explored. In the context of the survey, respondents were asked questions linking to action they witnessed being taken, as well as action they had personally taken, as a result of media exposure. The action sought after was action specifically linked to issues which they would not have otherwise been exposed to if it were not for having read, seen or heard about it via one or more media source. However, since the context was a quantitative interview this could not be explored adequately qualitatively and what qualified as action, and what not, could not be left up to the interviewer to conclude. Similarly which topics / issues were more long term concerns vs. those which were amenable to quick action or resolution could not be left up to the interviewer to discern. Hence indicators drawn from this section are not robust and should be interpreted within the context of the explained research and hence with caution. A qualitative exploration may provide better insight into the types of actions taken and the impact thereof.

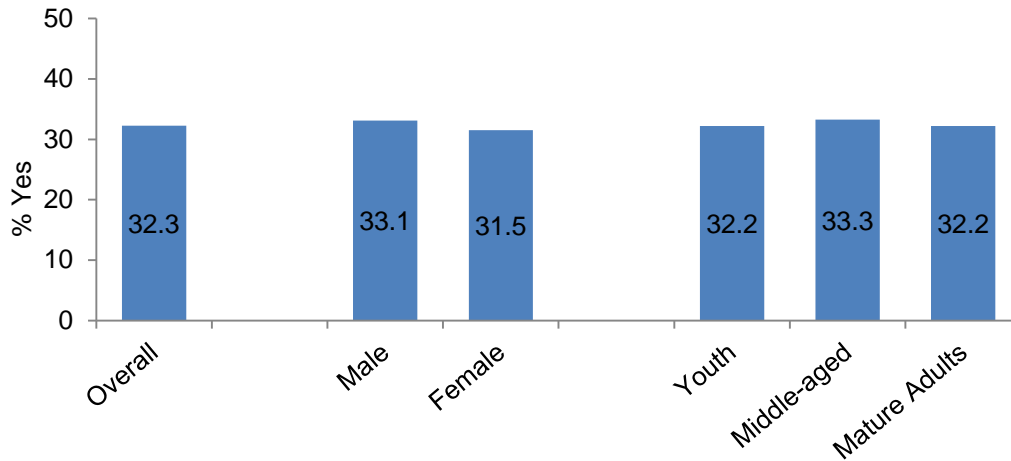
Respondents were asked about whether they had seen action being taken as a result of information published in the media. Close to a third (32.3%) of the general public indicated they had seen action taken (see Graph 3.28). An exposure to action taken as a result of media publications was more pronounced in urban areas (40.1%) than rural regions (28.9%). The Lake Zone (20.2%) and the Northern Zone (19.7%) were the least likely to have had this exposure while Zanzibar residents (81.1%) had extensive exposure compared to average. Apart from the sample from the Island region being small, it should also be noted that the study was done during a rather vibrant period in Zanzibar (related to the Uamsho movement) – hence the action taken results should be treated with caution.

No gender or age differences were apparent (see Graph 3.29). Interestingly a higher proportion of Tanzanians who had internet access (63.1%) reported being aware of action being taken as a result of issues gaining publicity in the media than Tanzanians who were still offline (30.2%). It is likely that internet users are more connected to information and hence are better able to access the news and current affairs.

Graph 3.28: Percentage exposure to action taken as a result of media publications – by region

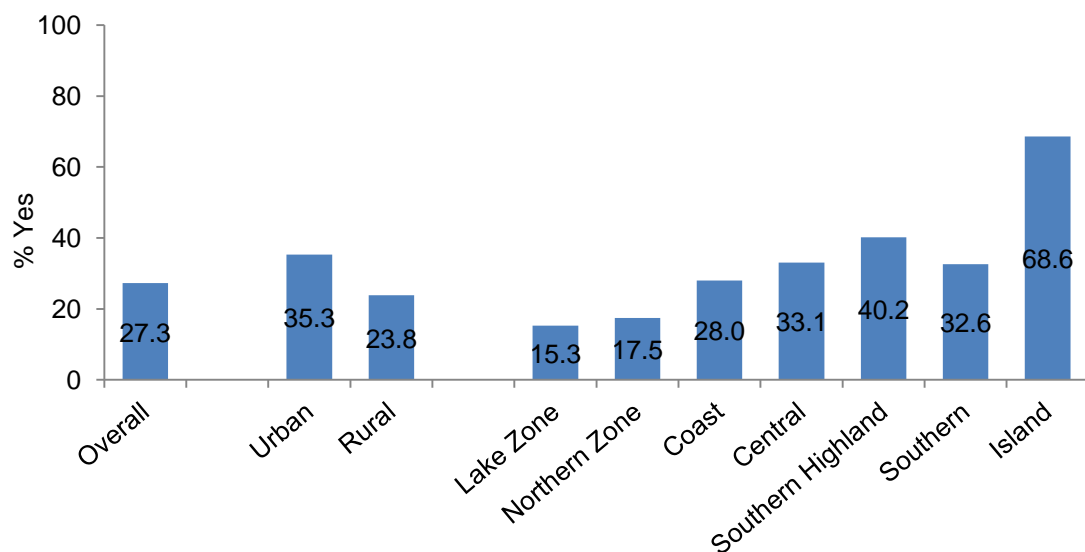


Graph 3.29: Percentage exposure to action taken as a result of media publications – by gender and age

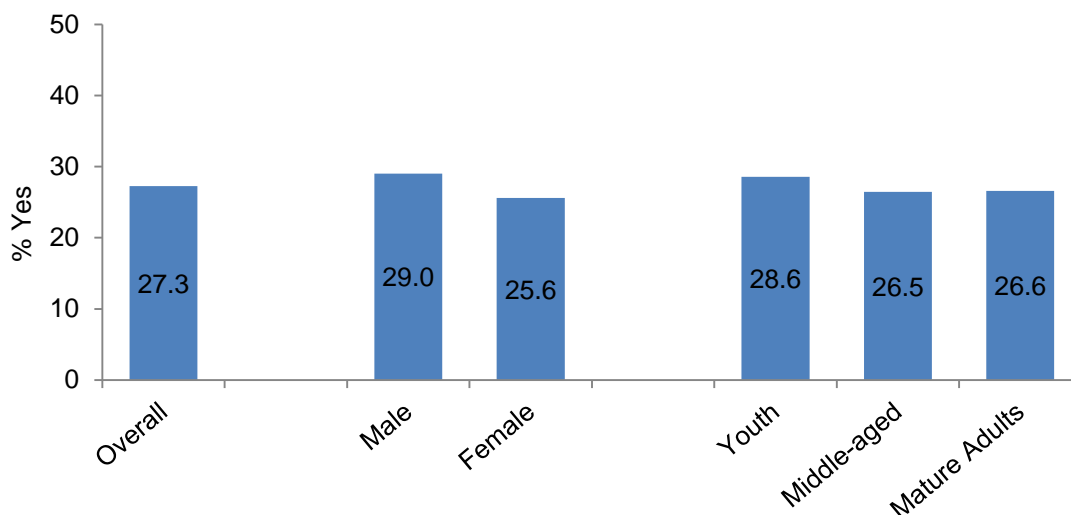


In a similar vein to having witnessed action, the public surveyed were asked whether they personally had ever been inspired to take action as a result of an issue being published in the media. Results followed the same trend as those pertaining to action witnessed, although the proportions were lower (see Graph 3.30 and 3.31). Overall, more than a quarter (27.3%) of the respondents indicated that they had personally taken some form of action as a result of something they had seen in the media, while in urban areas this proportion increased to 35.3%. Personal action was lowest in the Lake and Northern Zones. No significant differences were reported by gender and age although males and youth seemed to have marginally higher proportions of action.

Graph 3.30: Percentage personally taking action as a result of media publications – by region

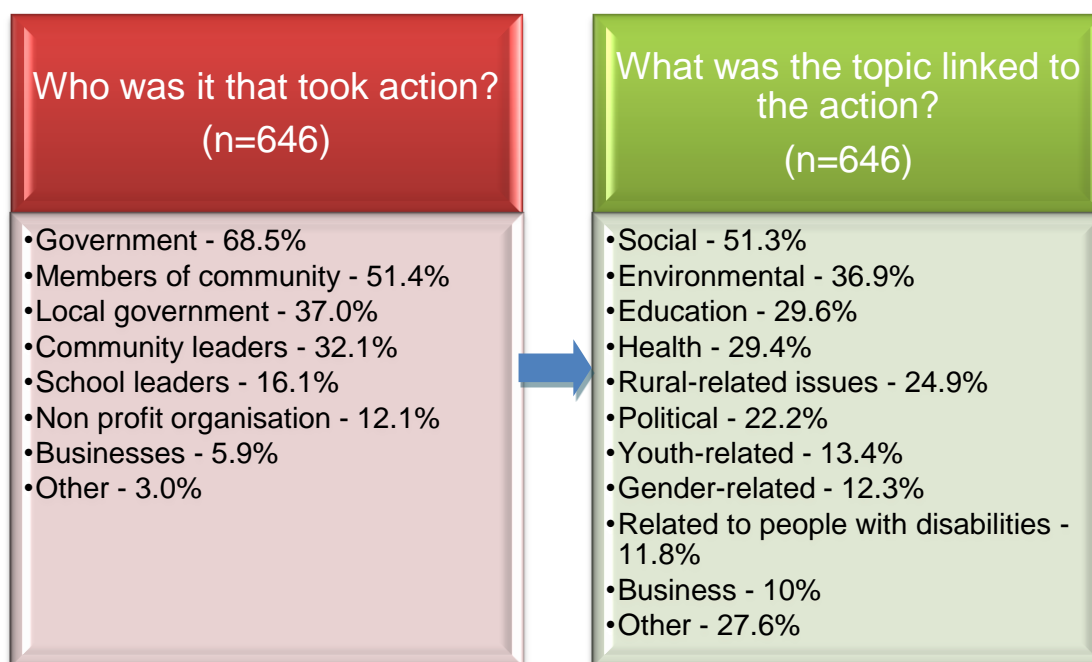


Graph3.31: Percentage personally taking action as a result of media publications – by gender and age



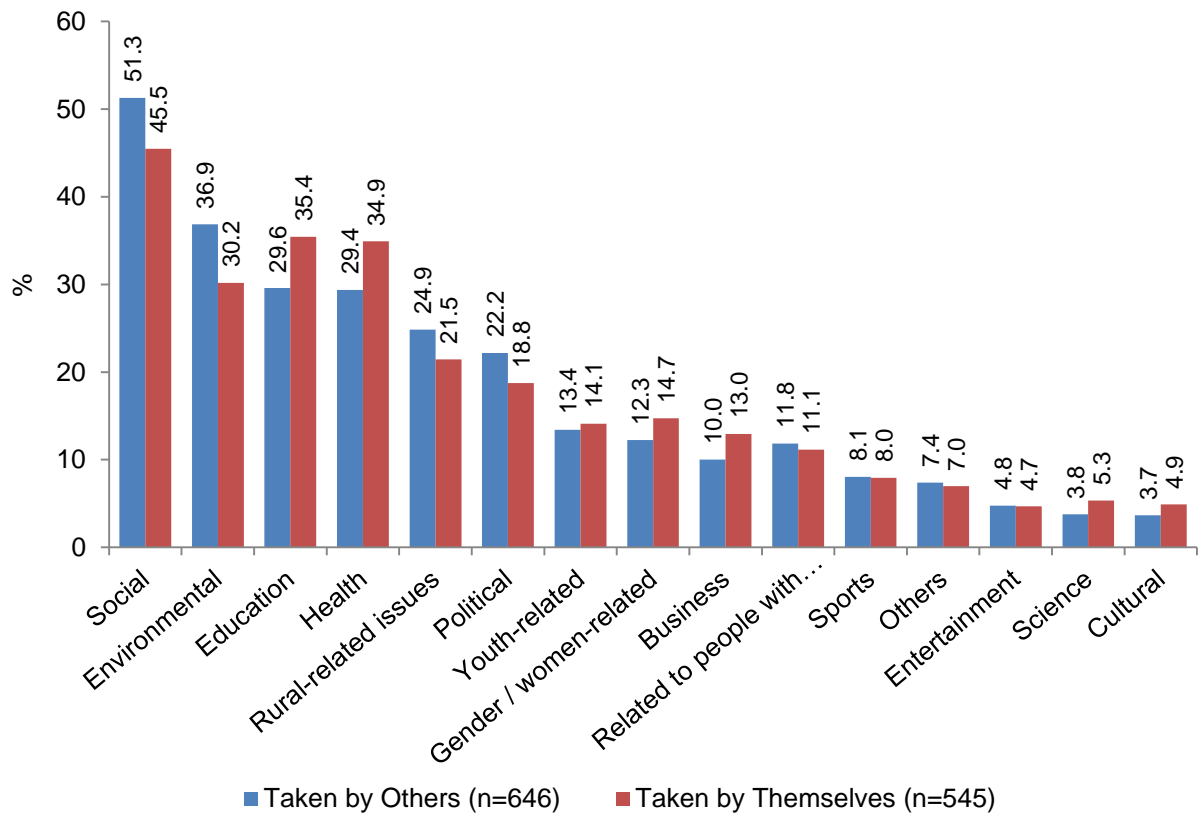
Turning back to those who witnessed action being taken, Figure 3.8 displays who they recalled having taken the action and what type of issue the action was linked to. Government topped the list (68.5%) followed by members of the community (51.4%). Actions linking to social issues were most likely to have been noticed, followed by environmental and educational issues. It may be that since these topics are of most interest, action in these areas was more likely to have been noticed, while politics, which is an area which of little interest to Tanzanians is less likely to catch attention.

Figure 3.8: Topic categories for action and who took the action





Graph3.32: A comparison of the types of issues linked to action taken by others and personally

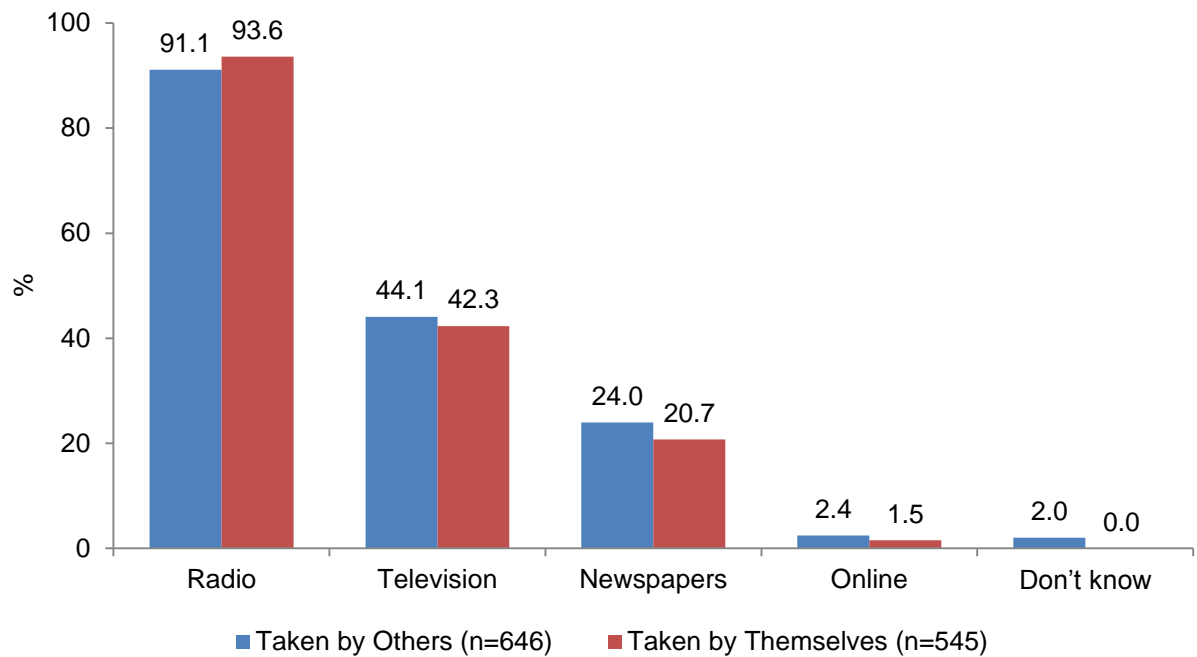


The majority of the public (72.8%) indicated that they did not take any action personally. More than a quarter of these individuals further commented that no issue would be important enough to inspire them to take action in the future. On a slightly more positive note, similar proportions indicated that issues such as education (30.6%), social (29.0%) and health (28.1%) could motivate them to act. Rural and environmental-related issues could potentially motivate 22% of those who had not taken any action before. Issues such as sports, cultural, political, entertainment and science, were not talking to the hearts of these citizens and less than 10% indicated that such topics could result in personal action.

Turning back to those who did take action, issues resulting in actions personally taken were very similar to those witnessed, although issues such as education and health were more frequently acted upon than environmental concerns (see Graph 3.32).

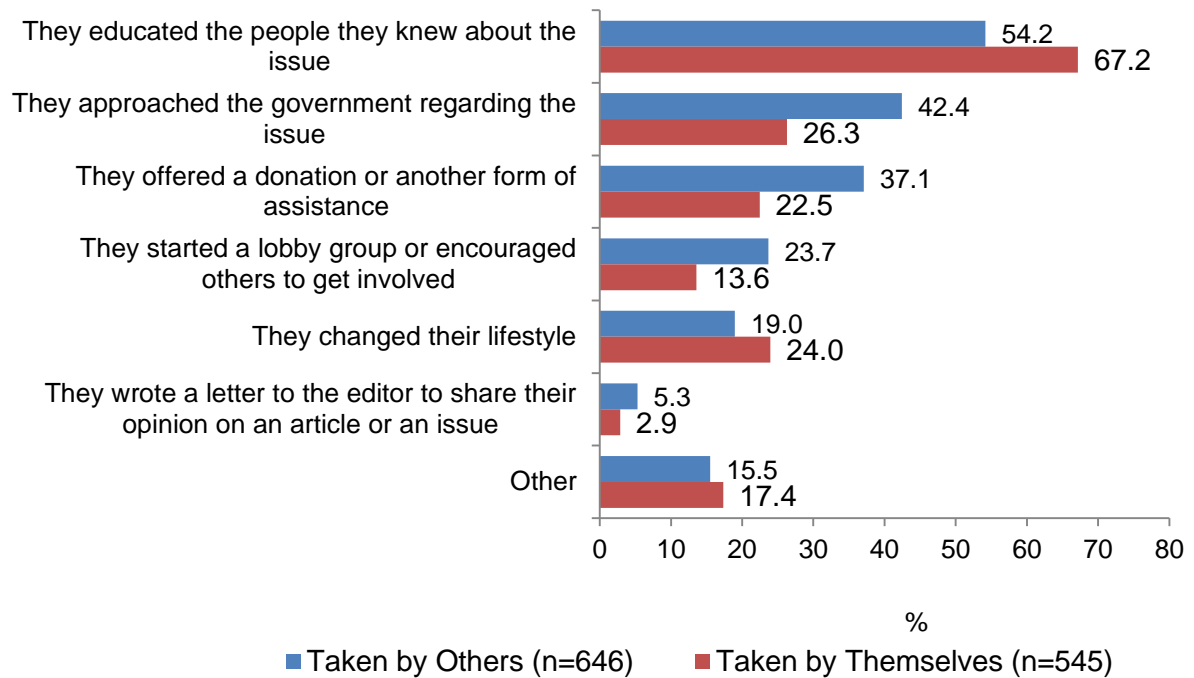
The type of media which reported the issue inspiring action followed the same trend in terms of public media exposure. Issues were most likely to have been reported on the radio, followed by television and finally the least likely exposure was via newspapers (see Graph 3.33).

Graph3.33: Type of media which reported the issues inspiring action



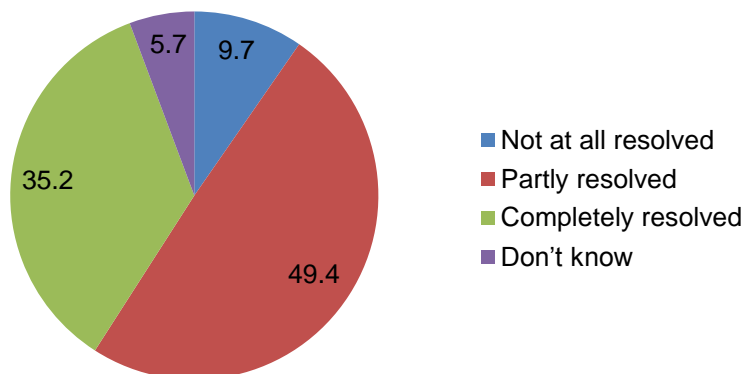
Turning to what action in particular was taken, education by far topped the list (see Graph 3.34). Whether it was action witnessed or personally taken, educating others on the topic was without a doubt the most common response. Approaching the Government with an issue was the second most common reaction from both others and personally. Offering donations or assistance, however, was more likely to have been witnessed than personally acted on. On a personal level lifestyle changes were the third most likely response to issues publicized in the media.

Graph3.34:Types of action witnessed or personally taken as a result of issues published in the media



In order to understand the impact the action taken has had on resolving the issues, an effectiveness index was calculated. The index takes into account that some issues are not resolved at all, others are partly resolved and some are completely resolved. This index ranges from 0-100 with 0 being not effective at all to 100 being effective resolution. The resulting index was 63.6% at an overall level. Results were not significantly different across demographics. The distribution of answers which gave input to the index can be viewed in Graph 3.35.

Graph3.35:Extent to which issue was resolved after the action taken by others



In 72% of the cases which were partly or completely resolved, the media did report on the resolution of the issue. Unsurprisingly, the media most commonly recalled as reporting the resolution was radio (92%), followed by television (49.7%) and finally newspapers (26.2%).

**Chapter 4: Main Findings: Decision makers**

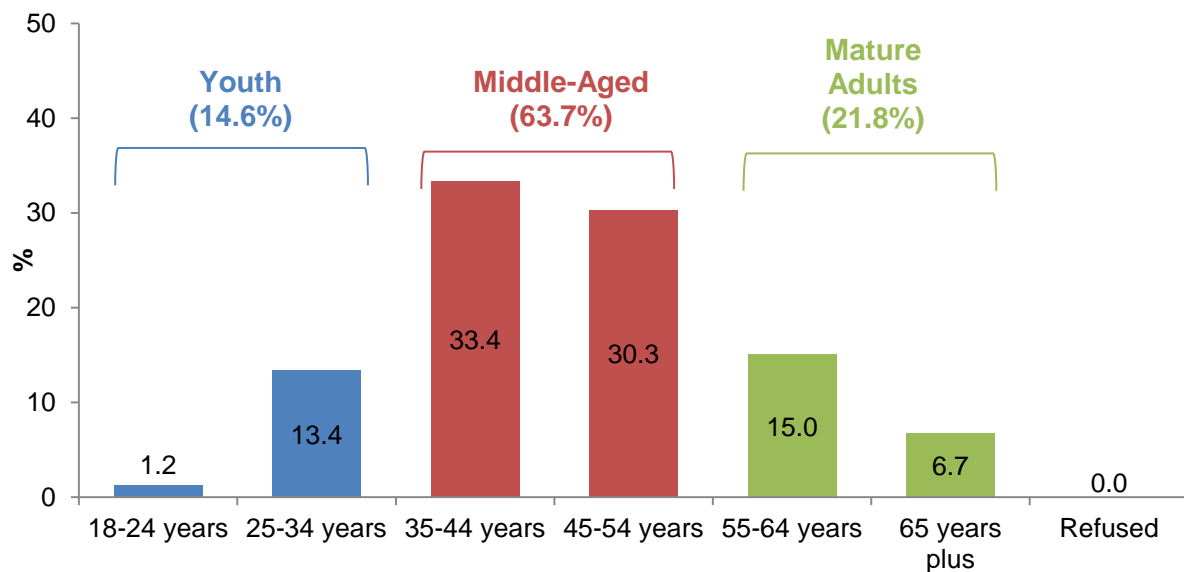
Chapter 3 dealt with the results from the survey done amongst the community, while this chapter looks at the results from the interviews done with decision makers in Tanzania.

**4.1 Respondent characteristics**

A sample of 200 decision makers was included in this segment of the survey. Of these 200, 60 lived in urban regions, and 140 lived in rural areas.

The demographic characteristics are illustrated in Graph 4.1 below, and unsurprisingly, the decision makers were more likely to be drawn from the older age categories.

Graph 4.1: Percentage distribution of age (n=200)



The gender split saw males dominate with only 38 of the 200 sample comprising of females (19.2%). This is a reflection of the still very much patriarchal nature of Tanzanian society. Very few women are selected for leadership positions and since women have a lower level of education than men they also assume fewer decision maker roles.

While education levels were slightly higher amongst this group than amongst the general community, there was still a fairly high proportion with no secondary schooling (49%). However there was a substantial group with tertiary education (18.6%). Table 4.1 reflects the highest education achieved across the decision makers sample.

Table 4.1: Percentage distribution of the highest educational level achieved (n=200)

Education	Percentage (%)
No formal education	0.4
Some primary school	23.0
Primary completed	25.6
Some secondary school	9.3
Secondary school completed	23.1
Tertiary Education	18.6

The type of leadership positions or occupations held by the decision makers interviewed is reflected in Table 4.2 below.

Table 4.2: Percentage distribution of the role held in the community by decision makers

Role	Decision makers overall (n=200)	Males (n=162)	Females (n=38*)
Village Executive	19.6	22.7	6.5
Head Teacher	13.6	10.7	25.9
Cell Leader	11.8	11.1	15.0
Ward Executive Leader	11.1	11.6	8.8
Religious Leader	8.3	9.5	3.1
Doctor	6.7	5.0	13.6
Leader of a Women's Group	3.4	0.0	17.8
Government official	3.3	4.1	0.0
Politician	2.6	3.2	0.0
Traditional healer	0.8	0.0	4.3
Head of a non-profit or non-governmental organisation	0.4	0.5	0.0
Other	18.4	21.6	5.1

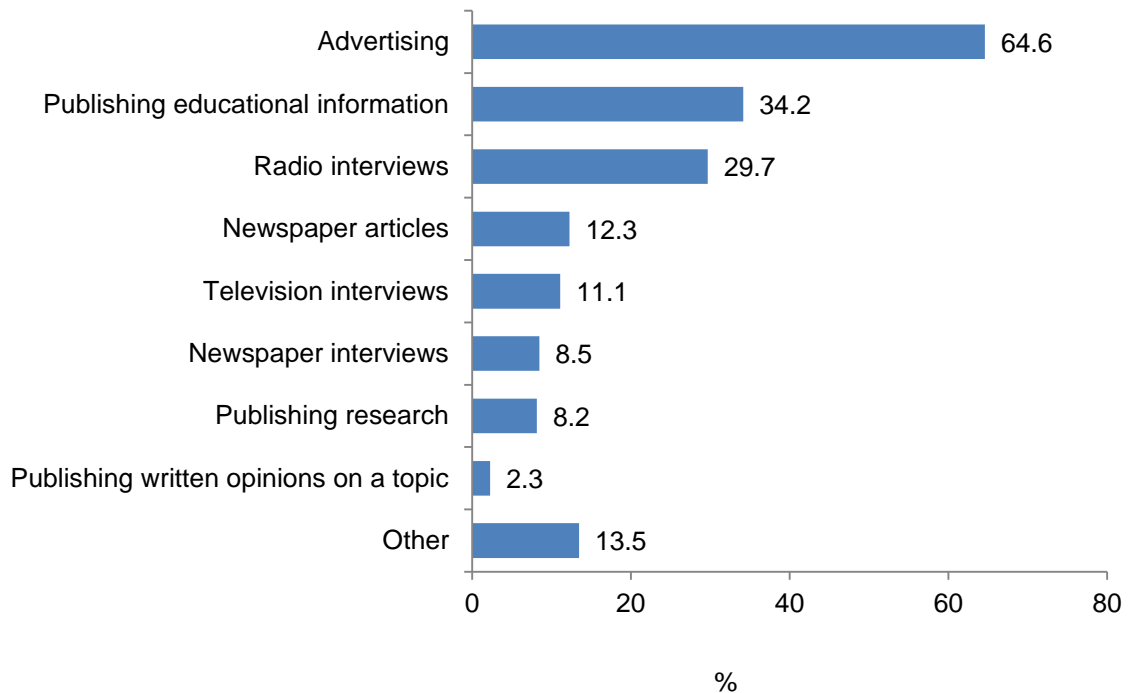
\*interpret with caution due to small sample

## 4.2 Media behaviour

### 4.2.1 Communication by decision makers

Half of the decision makers (50.1%) in the sample surveyed indicated that they had initiated media communications in order to communicate with groups in their community. In Graph 4.2 below, the popularity of various forms of media used in this communication is illustrated. Traditional advertising is clearly dominant, with almost two-thirds of those who do communicate, using this media form. Two other means are also popular, namely published educational information (34.2%) and radio interviews (29.7%). There are a variety of other formal means of communication, including publishing written opinions and interviews on television or in newspapers, as well as less formal means such door-to-door communication and simply using a loud speaker to take information to the people.

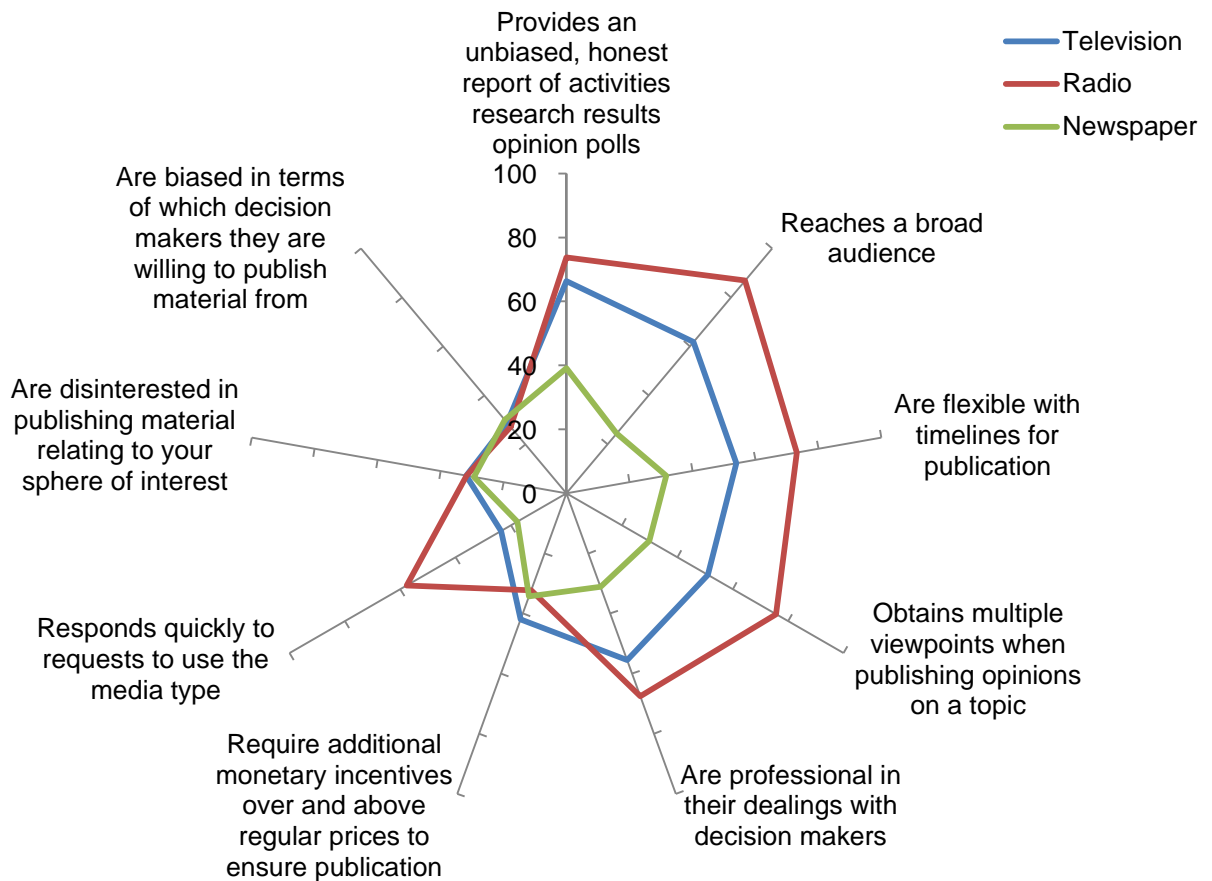
Graph 4.2: Forms of media used when communication with community (n=100)



Graph 4.3 displays the decision makers' perception of the media. On the whole, radio holds the most positive image amongst decision makers in terms of being utilized as a tool to communicate with their communities. It is generally considered to be unbiased by 73.8% of decision makers, who also believe it reaches a broad market (86.9%) and obtains a variety of points of view when covering a topic (75.6%). In addition, radio stations are less likely than other mediums (32.3%) to require additional incentives in order to get air time.

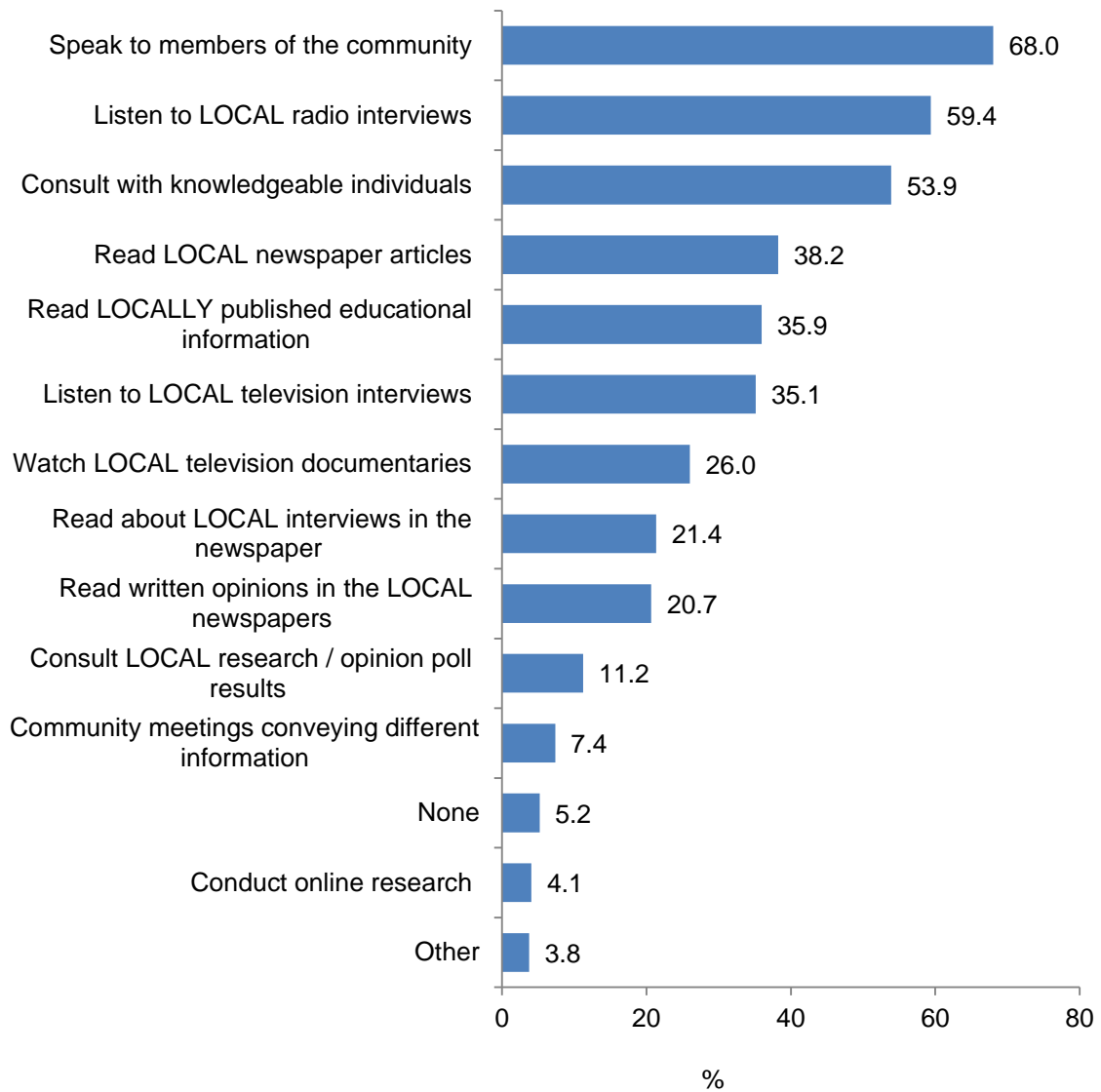
The opinion regarding television is less positive, and it is considered the media form most likely to require bribes before agreeing to cover their topics (42%). But it is newspapers that came in for the greatest amount of criticism. Decision makers recognize that, possibly due to literacy issues or the lack of popularity of newspapers amongst many, that this form does not reach a broad audience (only 24.4% associated newspapers with this attribute). Overall, this media form has no strengths over other forms to attract decision makers.

Graph 4.3: Perception of Tanzanian media from a decision maker's perspective (n=200)



Graph 4.4 shows that listening to the radio (59.4%) and chatting to members of the community (68%) or knowledgeable individuals (53.9%) were the three primary means that decision makers used to gather information about the community. They were less likely to read – either newspapers or published information – as a means of gathering information, and while television does have a place in information gathering, it is not one of the more popular methods. Some decision makers had consulted opinion polls (11.2%) but searching online was fairly uncommon (4.1%).

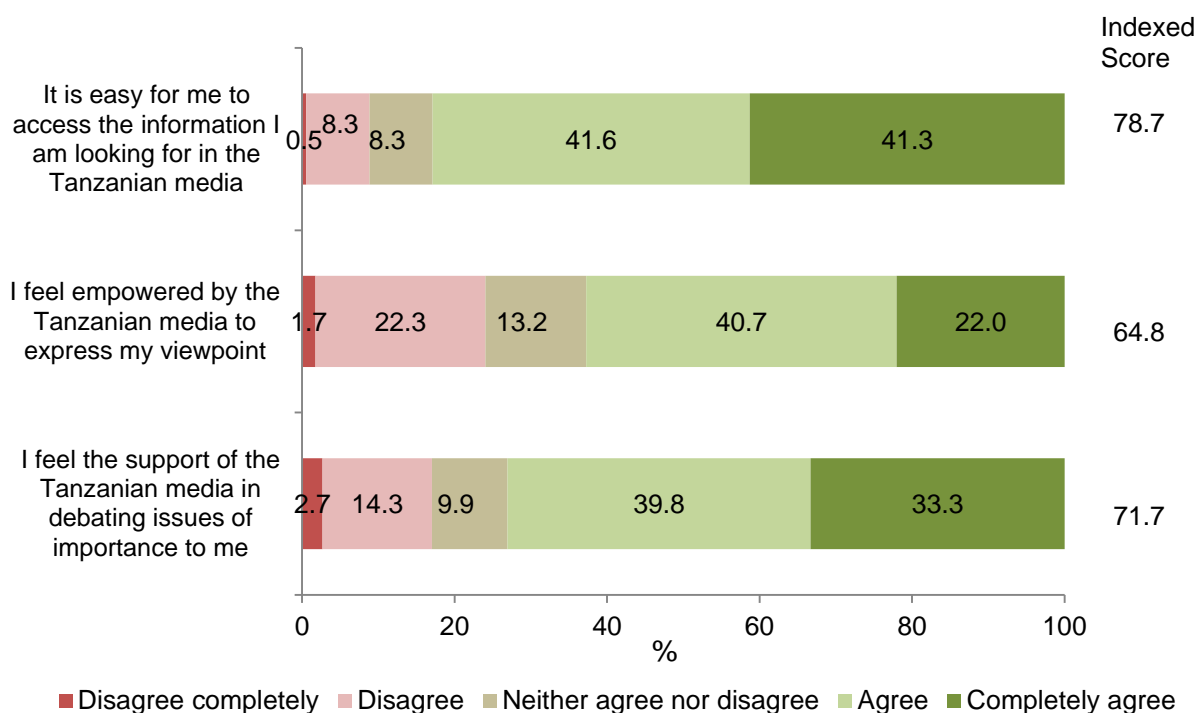
Graph 4.4: Methods used in gathering information utilized by decision makers (n=200)



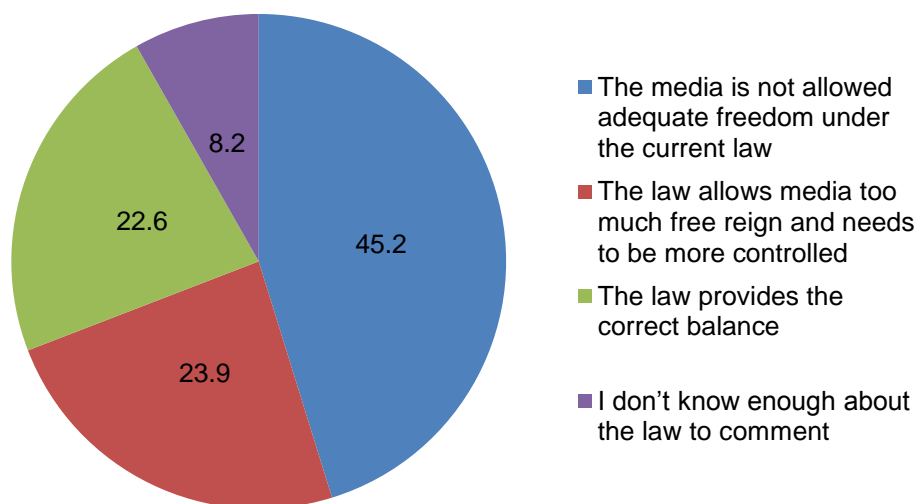
Graph 4.5 illustrates that most decision makers feel that they are able to access information with relative ease (82.9% agree with this statement), but are less likely to agree that the media empowers them to express their viewpoint – almost a quarter disagree that they are empowered by the media (24%). Slightly fewer (17%) feel that the media do not support them with regard to debating the issues that they wish to discuss, but the majority of decision makers are satisfied with the level of support they get.



Graph 4.5: Success of Tanzanian media in meeting decision makers' requirements (n=199)

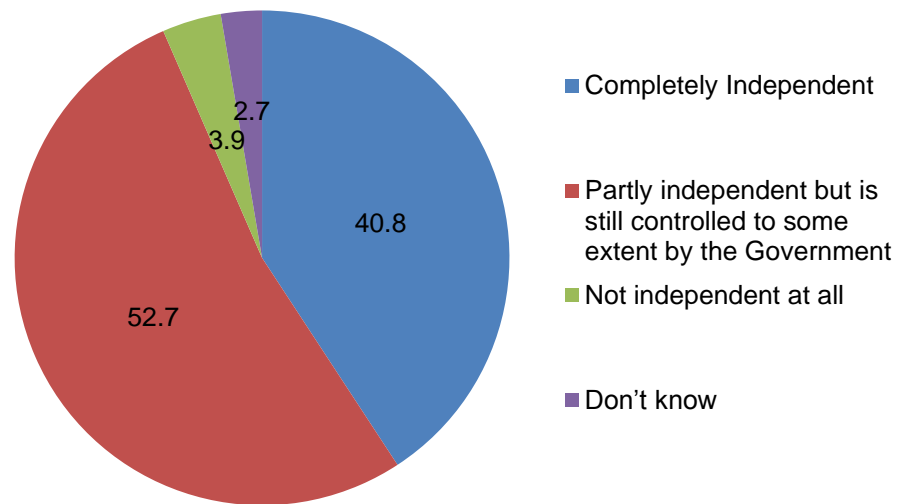


Graph 4.6: Perceptions of laws around media in Tanzania (n=200)



Graph 4.6 suggests that the popular belief (agreed by 45.2%) amongst decision makers is that the law in Tanzania does not provide adequate freedom to the media. The remaining respondents were split; with just under a quarter (22.6%) feeling it provided the correct balance, while the other quarter (23.9%) felt the laws were too lenient on the media and need to be tightened.

Graph 4.7: Perception around government control over the media (n=200)



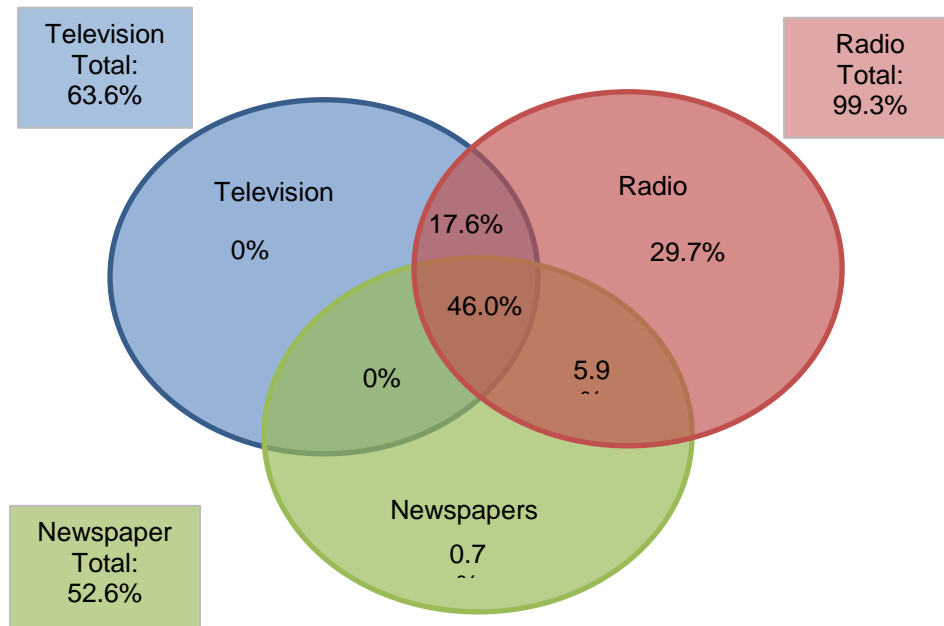
From Graph 4.7 we can deduce that there are few that feel that the media is completely under the control of the Government (3.9%). However, over half (52.7%) do feel that Tanzania's media is not wholeheartedly independent and even this level of suspicion is cause for concern as one of the foundations of true democracy is a completely free and independent media.

It is important to note that the above are perceptions of decision makers regarding the media, not those of media experts or stakeholders. The views of decision makers do not necessarily reflect the actual freedom of the media according to objective media standards.

#### 4.2.2 Media reach and usage

As with the community at large, radio is the media form that has the widest reach, with 99.3% of decision makers listening to the radio. In fact, although a little over half (52.6%) of decision makers do read the newspaper and nearly two-thirds (63.6%) watch television, these two media forms do little to extend the reach of media – other than the miniscule 0.7% of newspaper readers that did not listen to the radio, all those that watch television and read newspapers were already reached by the radio. Figure 4.1 illustrates the media reach and usage for the overall sample of decision makers.

Figure 4.1: Overall percentage reach and usage of media types (n=200)



While decision makers are more likely to read a newspaper, the trends of which publications they read did not differ substantially from that found amongst the general populace. Mwananchi remained the most popular (66% read this newspaper on a regular basis), followed by Nipashe (56.8%). Third most popular was Mtanzania (40.8%), which ranks higher than amongst the community at large where it only ranked sixth.

4.3: Percentage of newspaper readers who read each brand regularly (at least once a week) overall

Newspaper brands	Overall Newspaper readers (n=105)
Mwananchi	66.0
Nipashe	56.8
Mtanzania	40.8
Uhuru	32.2
Majira	31.9
Mwanahalisi	28.0
Mwanaspoti	26.5
Mzalendo	20.9
Rai	17.6
Tanzania Daima	15.8
Dimba	11.9
Habari Leo	10.6
Bingwa	9.6
Raia Mwema	9.6
Uwazi	8.9
Spoti Starehe	6.9
Champion	6.8
Daily News	5.0
Taifa Letu	4.2
Ijumaa	4.0
Jambo Leo	3.9
Zanzibar Leo	3.8
Ijumaa Wikenda	3.6
Dira ya Mtanzania	3.1
The African	2.8
Guardian	2.4
Msemakweli	1.9
Alasiri	1.8
The Citizen	1.6
Business Times	1.6
An Nuur	1.4
Kiongozi	1.0
EA Business Week	0.8
Hoja	0.8
Tazama Tanzania	0.8

Similarly, radio listenership trends were similar amongst decision makers and the community as a whole, with TBC Taifa and Radio Free Africa topping the charts at 71.1% and 65.8%

regularly tuning respectively. The other two stations which had a high proportion of Tanzanian decision makers tuning in were Radio 1 and TBC FM.

Table 4.4 Percentage of radio listeners who listen to each station regularly (at least once a week) overall

Radio Brands	Overall Radio Listenership (n=199)
TBC Taifa	71.1
Radio Free Africa	65.8
Radio 1	45.5
TBC FM	40.3
Clouds FM	21.5
Kiss FM	10.8
Bomba FM	7.8
Radio Uhuru	7.7
East Africa FM	7.3
Mbeya FM	6.9
Radio Sauti ya Injili	6.5
Times FM	5.8
Other	69.8 (all <5%)

Amongst the community sample, TBC1 TV had been the most commonly watched television channel, but amongst the decision makers, ITV was equally popular, with both attracting 80% of the television-viewing decision makers on a regular basis. Star TV was the only other channel that was found to attract a strong following at 67.8%, with EATV (the fourth ranked channel) only reporting 27.7% of regular viewers.

Table 4.5: Percentage of television viewers who watch each channel regularly (at least once a week) - overall

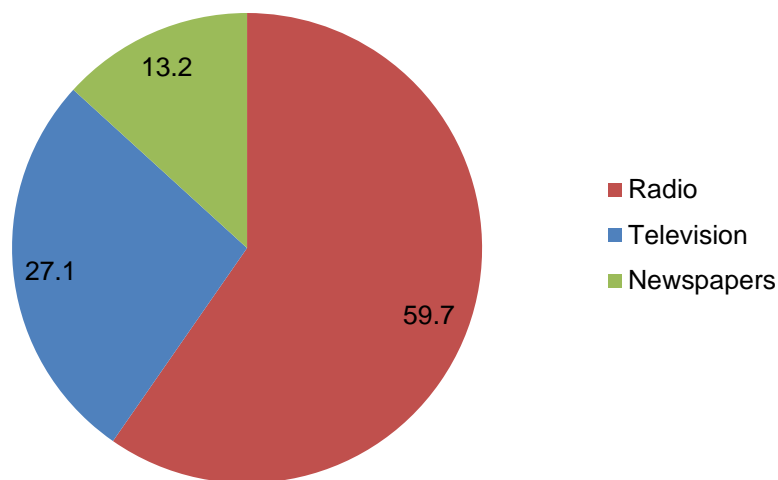
Television Brands	Overall Television Viewers (n=127)
ITV	80.0
TBC1 TV	80.0
Star TV	67.8
EATV	27.7
Channel 10	17.6
Mlimani TV	10.2
DTV	8.6
Clouds TV	7.1
TV Zanzibar	4.6
Capital TV	4.4
Tanga TV	2.9
TBC2TV	0.9
ATN	0.7

### 4.2.3 Media consumption

Media consumption is different from reach in that consumption takes frequency of exposure into account. Daily usage for example will equate to at least twenty-eight occasions in which the media type is used within a four week period. Similarly, usage four to six times a week is estimated to be twenty occasions of exposure, while two to three times is more or less ten occasions, once a week is four occasions and less than once a week is estimated to be two occasions in a four week time period. Hence looking at proportional consumption of each media type based on the number of occasions of exposure, a slightly more accurate picture in terms of usage emerges.

Graph 4.8 again shows the strength of radio in Tanzania from the point of view of frequency of use. Of all occasions when media is consumed, almost 60% (59.7%) of these involve the radio, compared to only 13.2% relating to newspapers. Consumption of television is slightly higher than amongst the decision makers at large, at 27.1% versus 21.6% amongst the community sample. Newspapers also show a higher level of penetration amongst decision makers as it only accounted for 8.6% of consumption occasions amongst the general community.

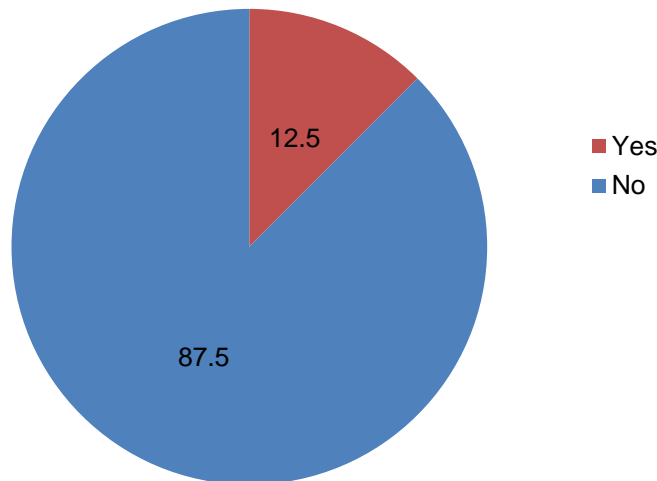
Graph 4.8: Proportion of media consumption overall– weighted by number of occasions



### 4.3 Internet behaviour

Whilst internet penetration is considerably higher amongst this group than amongst the population at large (12.5% amongst decision makers versus 6.4% amongst community), there is still room for a great deal of growth before this medium makes a substantial mark on the media playing field in Tanzania. Unfortunately, with such low penetration, their internet behaviour cannot be looked at in greater depth as the sample of internet users is only 25 for decision makers, and as such is far too low to provide reliable trending.

Graph 4.9: Proportion of internet penetration (n=200)



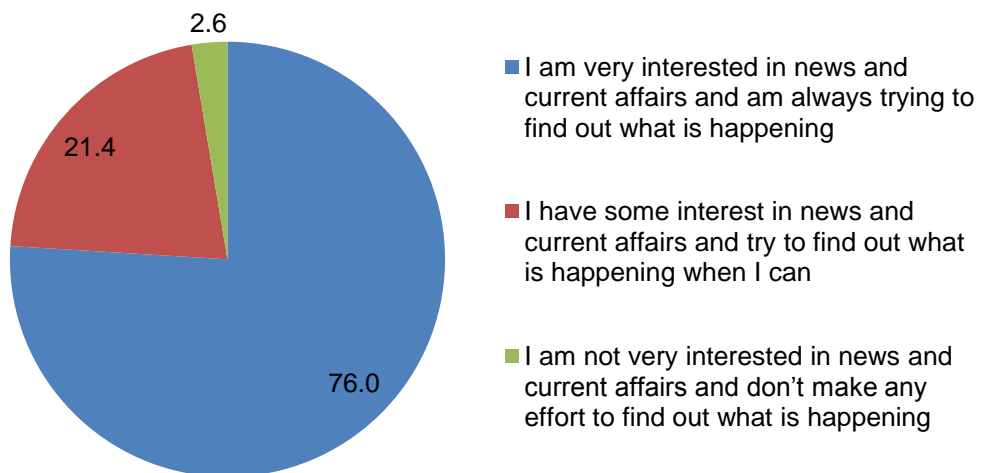
#### 4.4 Perceptions of media

##### 4.4.1 Level of interest in news / current affairs

The majority of decision makers appear to take their role seriously and make every effort to keep up with the latest news and current affairs (76% very interested). This is a 13.2% increase on the proportion of the overall population that indicated that they are very interested in news and current affairs.

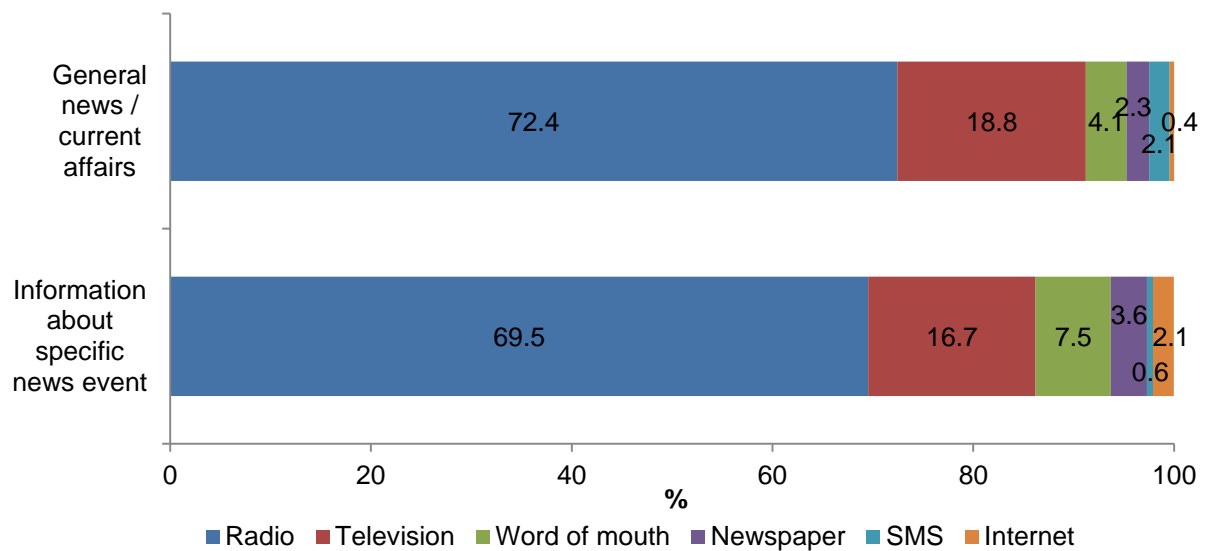
Of the remaining 24%, the majority have at least some interest in the news, with a mere 2.6% discounting the news as being of little interest to them.

Graph 4.10: Feelings about news amongst overall sample (n=200)



Graph 4.11 illustrates that there is not a great deal of difference between the media formats that decision makers turn to for general news as opposed to their sources for information about specific events. There was a slight reduction in radio as the preferred source for information about a specific event, with the internet and word of mouth slightly higher.

Graph 4.11: Preferred source for general news / current affairs and for information about a specific event in the news (n=200)

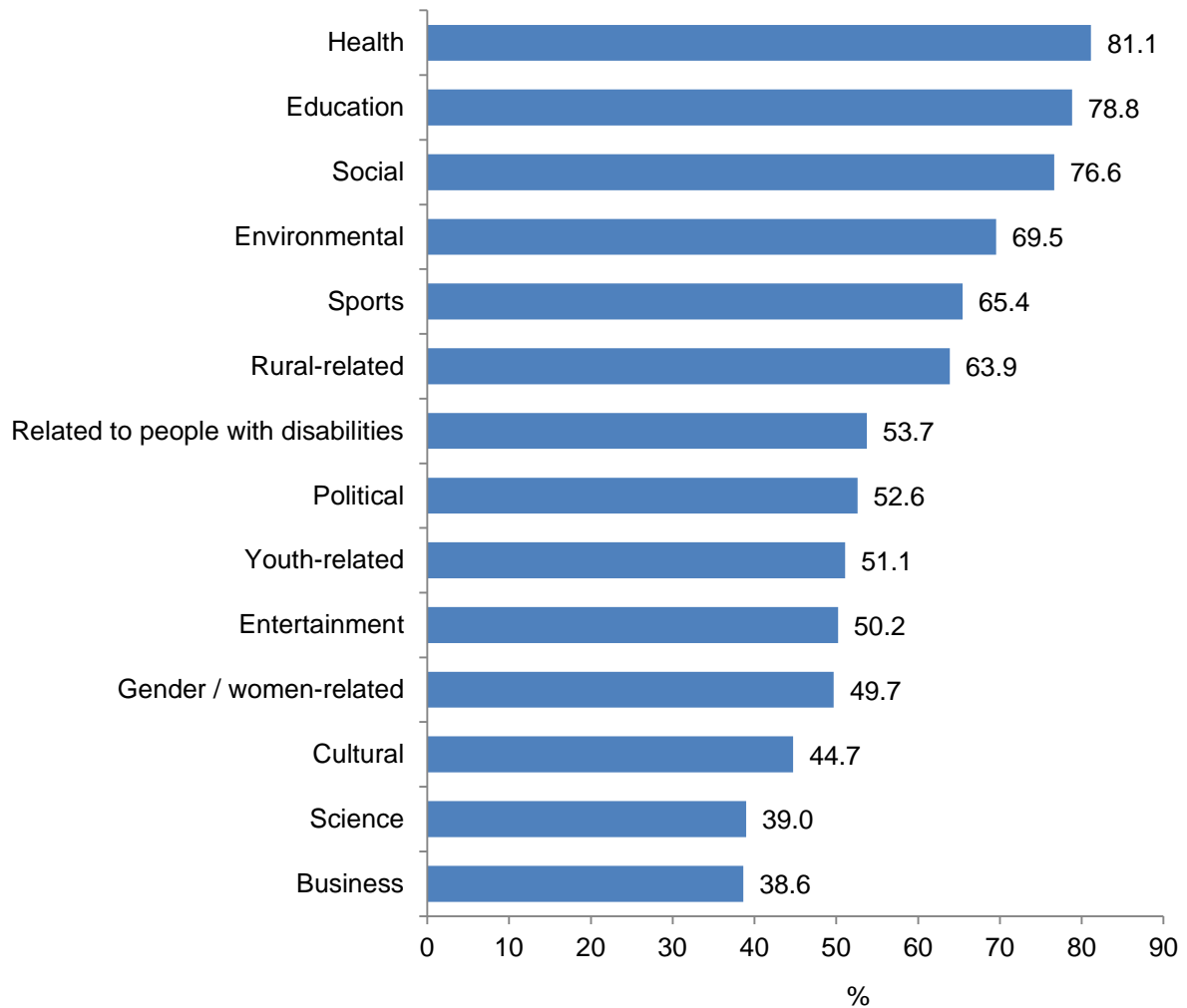


Once again health is the topic that dominates, with 81.1% of decision makers showing a high level of interest in this topic. Similar to the community as a whole, education (78.8%) and social issues (76.6%) are topics that decision makers are interested in seeing reported. Overall, patterns amongst this group were not that different from the community, although politics was more likely to grab this group’s attention (52.6% versus 41.3% in community as a whole).

Rural issues and news relating to people with disabilities were more likely to be noted with interest by this niche group, but women-related issues saw a slight drop. This is likely to be due to the considerably smaller proportion of women in the decision makers’ sample.



Graph 4.12: Proportion 'very interested' in specific topics

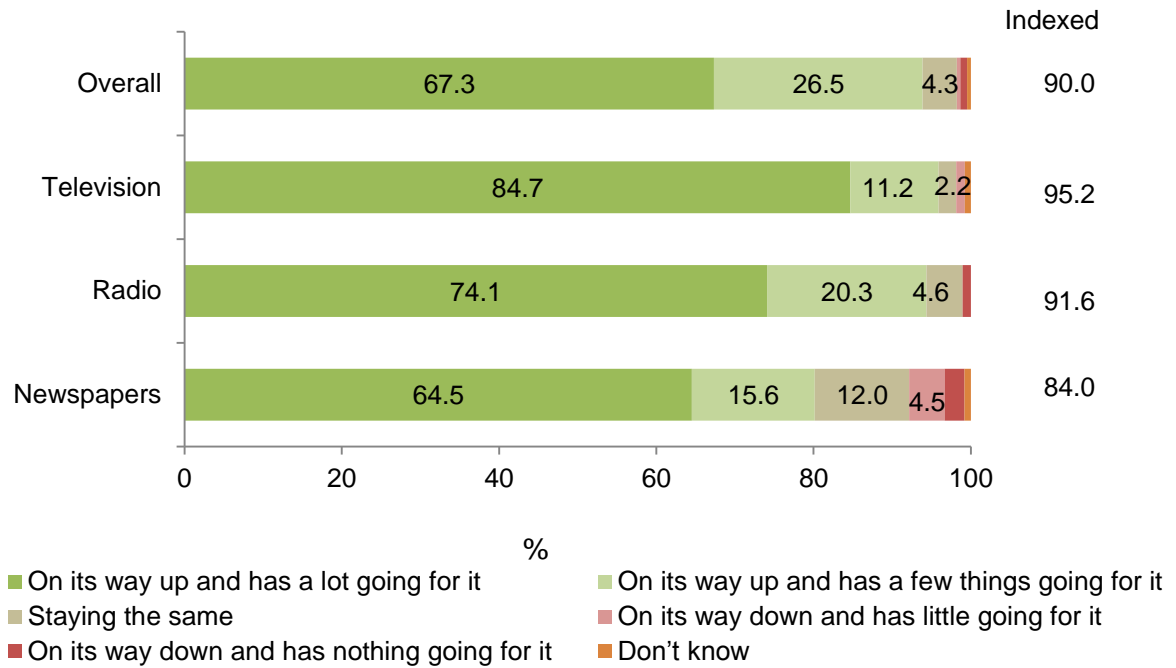


#### 4.4.2 Overall Impressions

Graph 4.13 reflects a media positivity index score of 90% amongst decision makers. This score indicates how positive the top of mind impression is of Tanzania's media overall. It is a very high score, even higher than that recorded by the community as a whole (87.1%).

Both television and radio were considered to be improving (with 95.9% and 94.4% respectively saying the mediums were 'on their way up'). Newspapers do not engender quite as positive a perception, with a lower 80.2% feeling that newspapers are improving. Nevertheless, opinions tend to be very optimistic about the direction all formats are taking.

Graph 4.13: Overall impressions of Tanzanian media and the media positivity index



#### 4.4.3 Quality of media

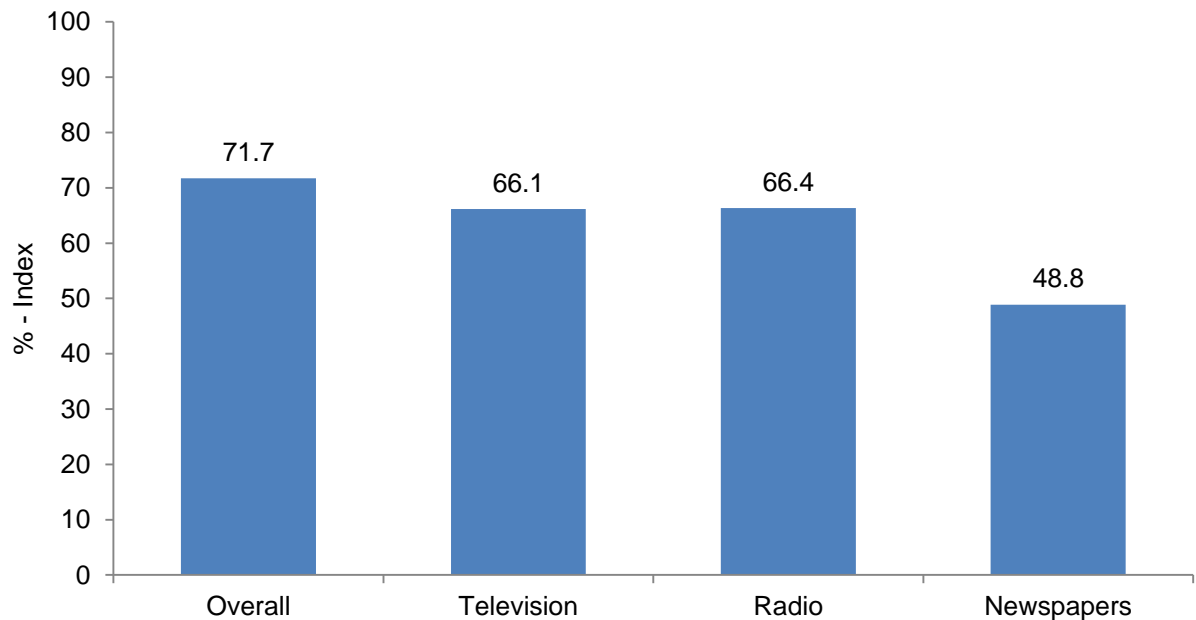
The decision makers were presented with a list of descriptions from which they had to select those that they felt described Tanzanian media overall, as well as each media type. This was used to calculate a quality index by determining the average percentage associations across the following attributes:

- Trustworthy
- Independent
- Transparent
- Vibrant
- Top Quality
- Professional
- Objective
- Diverse Content
- Critical Thinking
- Accurate

The index thus ranged from 0 to 100 with 0 indicating very poor quality and 100 excellent quality. Graph 4.14 illustrates the quality index results for Tanzanian media overall and for each media type.

Although the quality index was acceptable at an overall level (77.1%), when calculated for each media type clear distinctions emerged. In line with previous opinions, newspapers ranked the lowest with a quality index of 48.8%, even lower than perceived by the community sample (55.2%). This media format needs a fair amount of focused attention to improve perceptions among readers. Television fared better with a score of 66.1%, and finally radio which achieved the highest baseline score of 66.4%, slightly lower than the community index of 70.8%.

Graph 4.14: Quality index for Tanzanian media – overall (n=200)



In order to understand the elements of quality impacting perceptions, the proportion of associations with each quality attribute must be examined, as well as the importance of each element in driving overall media perceptions. Table 4.6 illustrates the importance rankings of each quality attribute. Note that the importance is derived based on the decision makers' perceptions and hence the importance rankings are different from those of the general public. Given the current status of the media in Tanzania, aspects such as trustworthiness, independence, accuracy and transparency are the most important qualities to driving overall perceptions among decision makers. Improvements on these dimensions will have the biggest impact on overall decision makers' perceptions. Elements like diverse content and professionalism are still important but given that the fundamentals are not met adequately yet, these aspects tend to move down in importance until performance is acceptable. Elements such as showing critical thinking, which is expected of top performing media, is of less importance while other aspects need to be addressed first.

Table 4.6: Importance and ranking of the quality attributes which drive overall media perceptions in Tanzania

Quality Attributes	Importance Ranking
Trustworthy	HIGH – 1
Accurate	HIGH – 2
Transparent	HIGH – 3
Vibrant	MIDDLE- 4
Top quality	MIDDLE – 5
Diverse Content	MIDDLE – 6
Objective	MIDDLE - 7
Independent	MIDDLE – 8
Professional	MIDDLE - 9
Critical thinking	LOW – 10

Given the importance, performance needs to be reviewed in order to highlight current strengths and weaknesses, so interventions can be designed for the weak areas while other aspects can be maintained and monitored. Graphs 4.15-4.17 illustrate the priority areas taking both importance and performance into consideration, with the box depicting ‘Weaknesses’ being the area that requires priority action. If an aspect has middle to high importance and performance is below 70%, it is classified as a weak area, while if performance is greater than 70% it is a strength. If the importance is low, however, even if performance is greater than 70%, it would not be considered a strength as the aspect does little to drive overall perceptions. Hence such, elements would simply need to be maintained. If performance is below 70%, it would not be considered a weakness as the area is not as important. Such aspects would be closely monitored rather than large amounts of resources being spent to improve performance.

Both television and radio can boast the strengths of being trustworthy, accurate, transparent, vibrant and independent. There is still room for improvement though, in particular on the accuracy dimension. Unfortunately, newspapers have a long struggle ahead to pull perceptions up on these attributes, all of which are perceived to be current weaknesses. Professionalism, diversity of content, objectivity and top quality are weak areas across all three media types. Objectivity in particular is rated very low and will need focused attention. Radio, unlike the other two media performs well on critical thinking and hence needs to maintain performance there whilst for television and newspapers this aspect needs to be monitored. However, interventions aimed at other aspects are more important for those media types.

Graph 4.15: Quality attribute priority matrix for television

<p><b>Weaknesses</b> (middle to high importance and low performance &lt;70%)</p> <p>Top quality (58.9%) Diverse content (67.5%) Objective (13.2%) Professionalism (38.3%)</p>	<p><b>Strengths</b> (middle to high importance and high performance &gt;70%)</p> <p>Trustworthy (94.8%) Accurate (72.2%) Transparent (83.7%) Vibrant (84.7%) Independent (80.0%)</p>
<p><b>Monitor</b> (low importance and low performance &lt;70%)</p> <p>Critical thinking (68.1%)</p>	<p><b>Maintain</b> (low importance and high performance &gt;70%)</p>

Graph 4.16: Quality attribute priority matrix for radio

<p><b>Weaknesses</b> (middle to high importance and low performance &lt;70%)</p> <p>Top quality (59.2%) Diverse content (67.0%) Objective (16.4%) Professionalism (33.7%)</p>	<p><b>Strengths</b> (middle to high importance and high performance &gt;70%)</p> <p>Trustworthy (92.4%) Accurate (78.4%) Transparent (79.7%) Vibrant (80.5%) Independent (82.6%)</p>
<p><b>Monitor</b> (low importance and low performance &lt;70%)</p>	<p><b>Maintain</b> (low importance and high performance &gt;70%)</p> <p>Critical thinking (73.8%)</p>

Graph 4.17: Quality attribute priority matrix for newspapers

<p><b>Weaknesses</b> (middle to high importance and low performance &lt;70%)</p> <p>Trustworthy (65.7%) Accurate (54.5%) Transparent (67.8%) Vibrant (61.4%) Independent (65.4%) Top quality (38.0%) Diverse content (43.7%) Objective (8.9%) Professionalism (27.2%)</p>	<p><b>Strengths</b> (middle to high importance and high performance &gt;70%)</p>
<p><b>Monitor</b> (low importance and low performance &lt;70%)</p> <p>Critical thinking (55.8%)</p>	<p><b>Maintain</b> (low importance and high performance &gt;70%)</p>

#### 4.4.4: Media Coverage

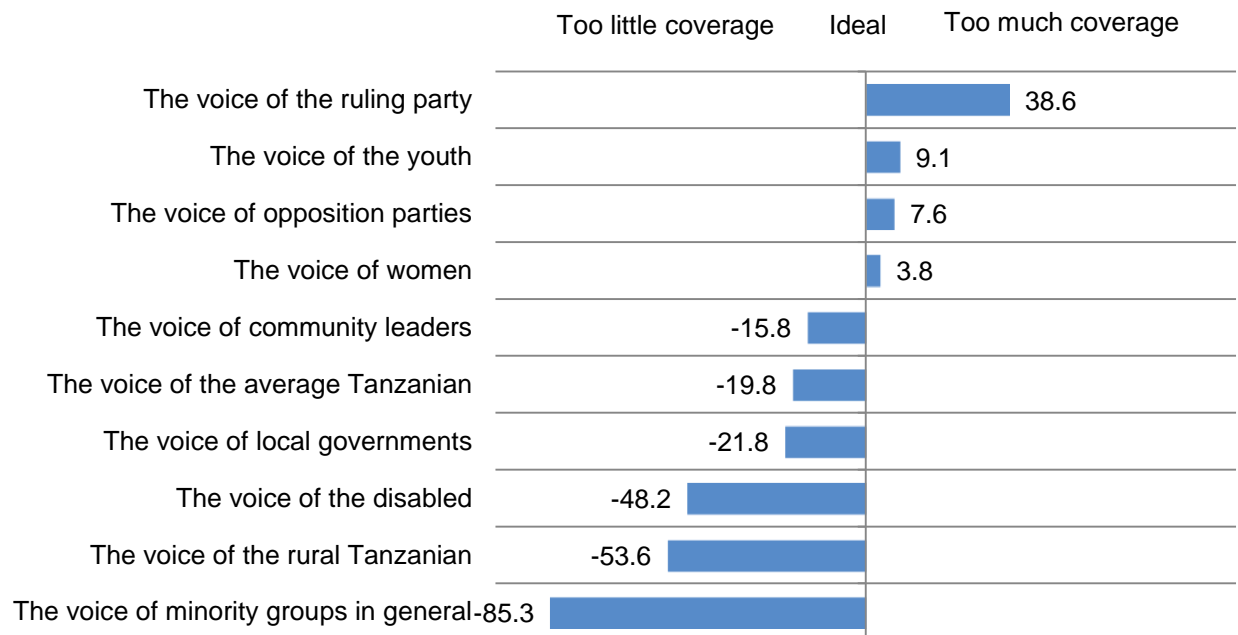
Decision makers in society have a duty to listen to a range of opinions and ‘voices’, and to ensure everyone’s opinion is taken into account. This is more difficult to achieve if media forms do not adequately cover each of these voices. They were therefore asked to rate the coverage of each of the voices in their experience. These ratings were used to create an index ranking from -100 to +100, with a zero point at the centre indicating an ideal balance of coverage.

Graph 4.18 depicts their perceptions of the degree of coverage given to each voice. As could probably be expected, the perception is that most voices are not given sufficient coverage. The greatest exception is the voice of the ruling party, which at an index of 38.6 is perceived to be over-reported. Opposition parties (+7.6) and the youth (+9.1) are also slightly over the ideal coverage level, while women’s voices (+3.8) come close the ideal in terms of coverage.

While women and the youth appear to be getting greater amounts of coverage, minority groups in general remain the most unheard (-85.3). More specifically, the disabled and rural Tanzanians are considered to suffer from insufficient coverage (-48.2 and 53.6 respectively). However, this can’t be achieved through sacrificing the voice of the average Tanzanian, who is also reportedly not heard quite enough (-19.8).

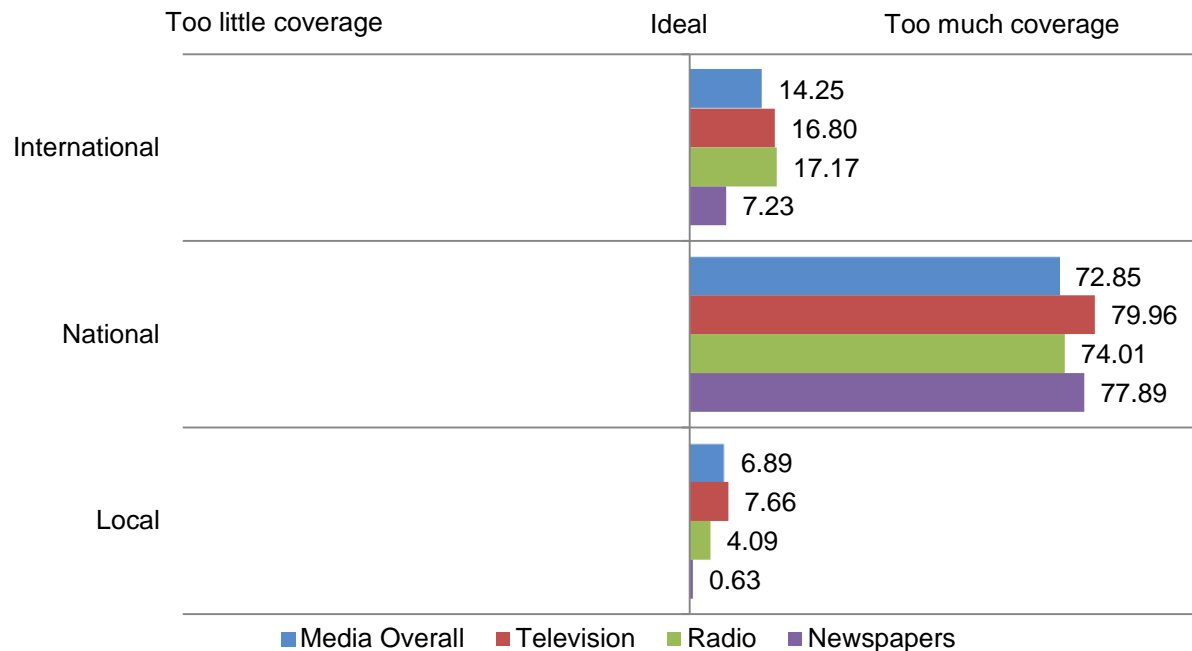
Given that many of the decision makers are in local government or other leadership roles in the community, it is not surprising that there is some feeling that their voices are unreported as well (-15.8 for community leaders and -21.8 for local government).

Graph 4.18: Coverage index for the various voices among the Tanzanian decision makers (n=200).



The coverage index for local, national and international topics of interest (see Graph 4.19) indicated that local and international issues were getting close to the ideal amount of coverage. National issues dominated media content and were perceived to have more coverage than desired.

Graph 4.19: Coverage index for local, national and international issues among the Tanzanian decision makers (n=200).

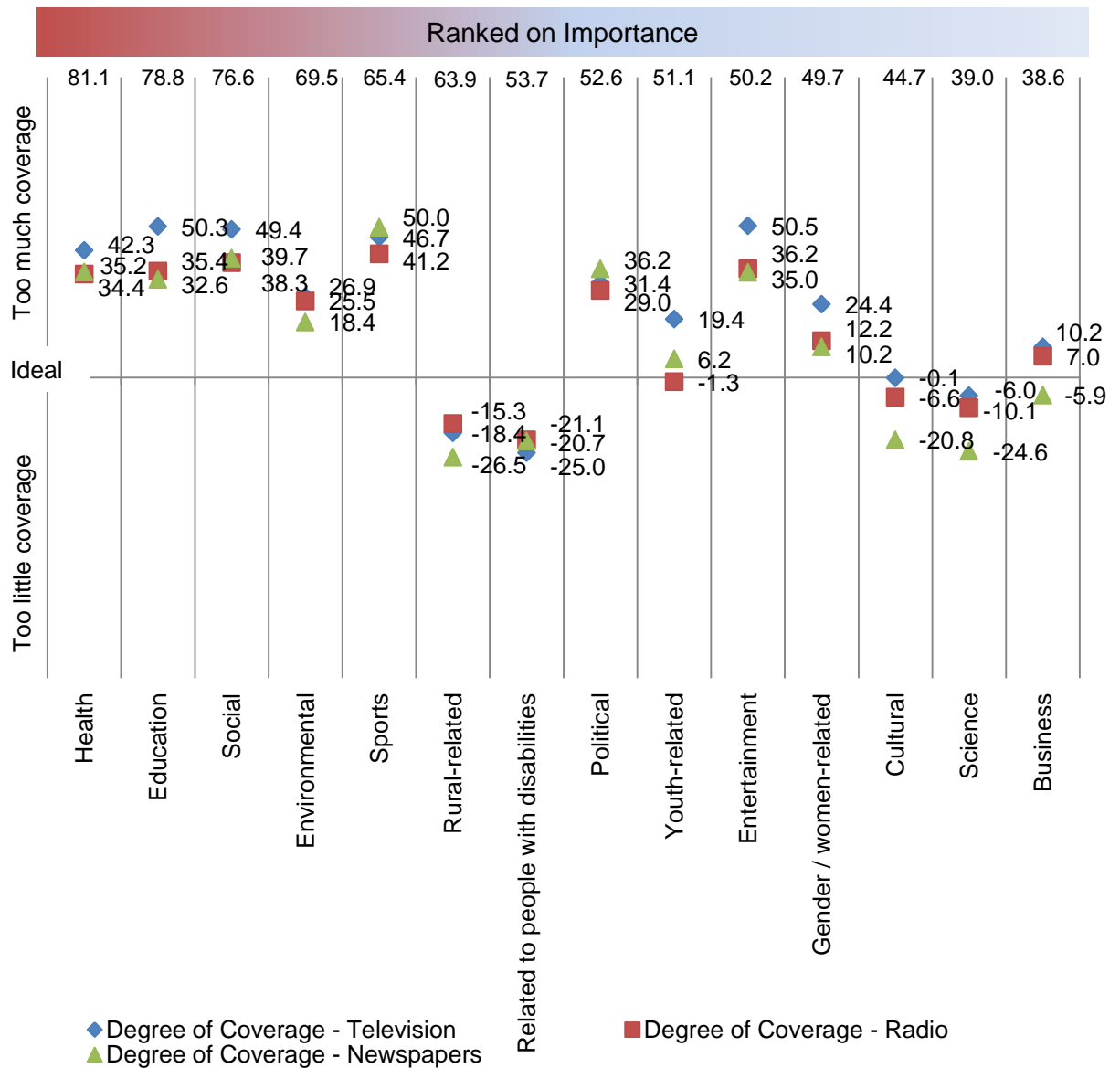


#### 4.4.5 Media Content

Despite the fact that health, education and social issues are the most important topics to decision makers, there is a perception that there is already too much coverage on these areas, particularly on television. While the results in Graph 4.20 suggest that there is too much coverage on a range of subjects, it appears that there may be room for more coverage on rural-related issues and around people with disabilities in particular. Whilst not the most important, these issues are relatively important and the negative index scores for all media types in this regard indicates that decision makers are likely to appreciate some increase in coverage.

Cultural and science topics may be lower on the scale of importance, but even so, the amount of coverage by newspapers on these topics is considered to be too meagre on the whole.

Graph 4.20: Diversity of coverage on topics in each media type, ranked on stated importance of that topic (for television, n=129, for radio, n=199 and for newspapers, n=109)

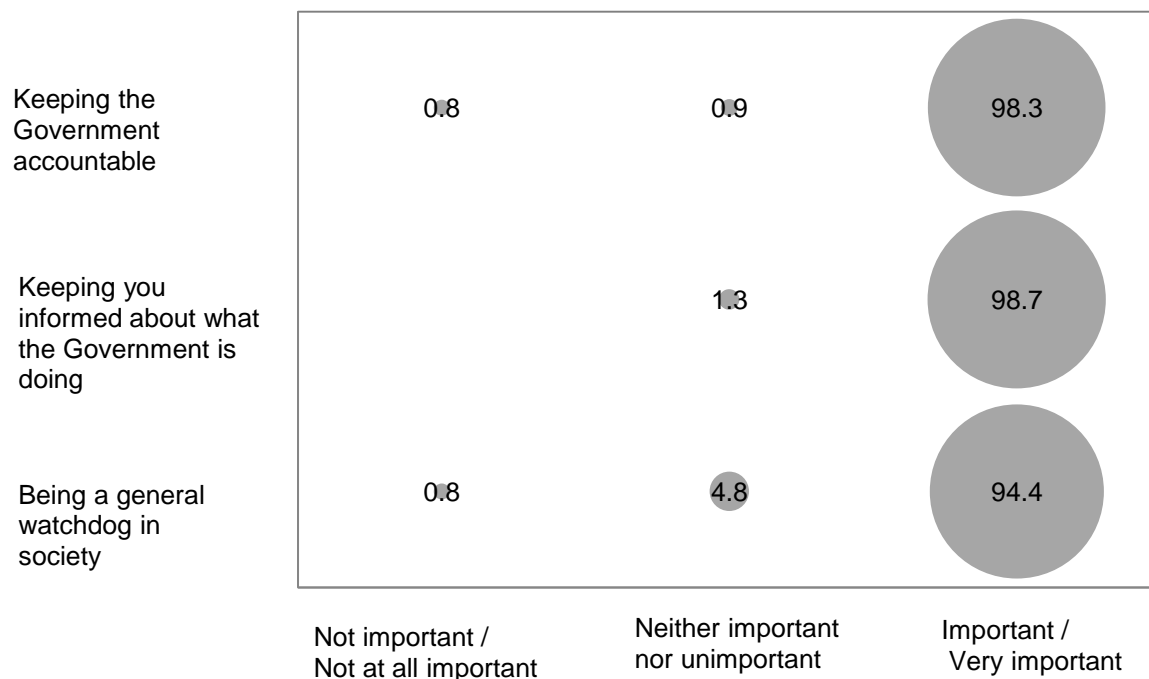


#### 4.4.6 Role of the Media in creating Accountability

Much like opinions raised by the community survey, viewpoints regarding the importance of media’s role in creating accountability were unanimous. Tanzanian decision makers believe that the media has to keep the Government accountable, should keep the citizens informed about what the Government is doing and should play the role of ‘watchdog’ in society (see Graph 4.21).



Graph 4.21: Percentage agreement on the importance of the media’s role in creating accountability



When probed on how successful the media is in playing the part, the Tanzanian decision makers were very positive. An index was created regarding the perceived success of the media in creating accountability. The index ranged from 0 to 100 where 0 would mean unsuccessful and 100 would be very successful. The resulting index was in the seventies for all three accountability statements (see Table 4.7).

Table 4.7: Perceived success in creating accountability index (n=200)

Accountability Statements	Index
Keeping the Government accountable	78.7
Keeping you informed about what the government is doing	79.1
Being a general watchdog in society	74.5

#### 4.4.7 Action taken in response to media publications

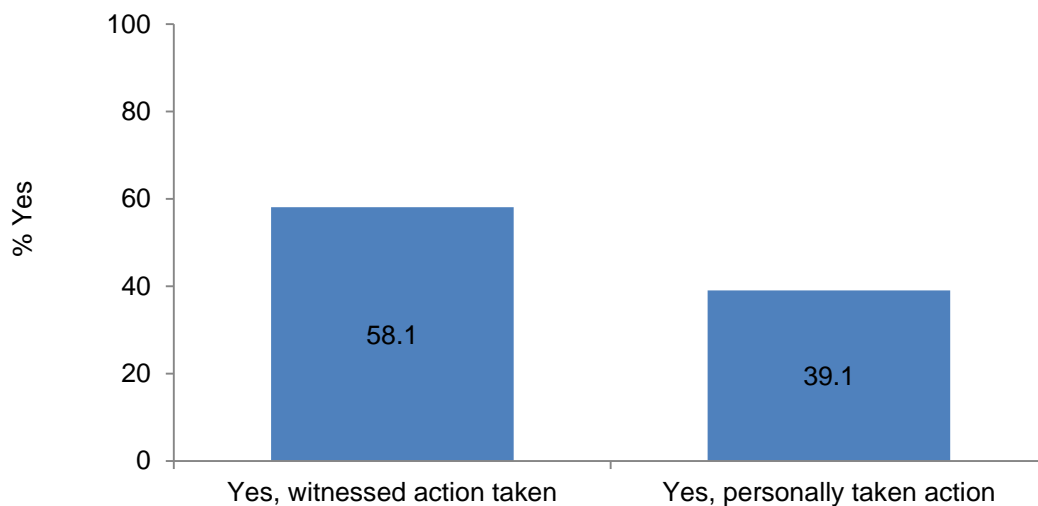
Apart from gaining an understanding of the perceptions of the decision makers regarding the role of the media in creating accountability, an understanding of the impact the media had in generating action was explored. As was mentioned with regards to the community survey, in the context of the survey, decision makers were asked questions linking to action they witnessed being taken, as well as action they had personally taken in their leadership role, as a result of media exposure. The action sought after was action specifically linked to issues which they would not have otherwise been exposed to if it were not for having read, seen or

heard about it via one or more media source. However, since the context was a quantitative interview this could not be explored adequately qualitatively and what qualified as action, and what not, could not be left up to the interviewer to conclude. Similarly which topics / issues were more long term concerns vs. those which were amenable to quick action or resolution could not be left up to the interviewer to discern. Hence indicators drawn from this section are not robust and should be interpreted within the context of the explained research and hence with caution. A qualitative exploration may provide better insight into the types of actions taken and the impact thereof.

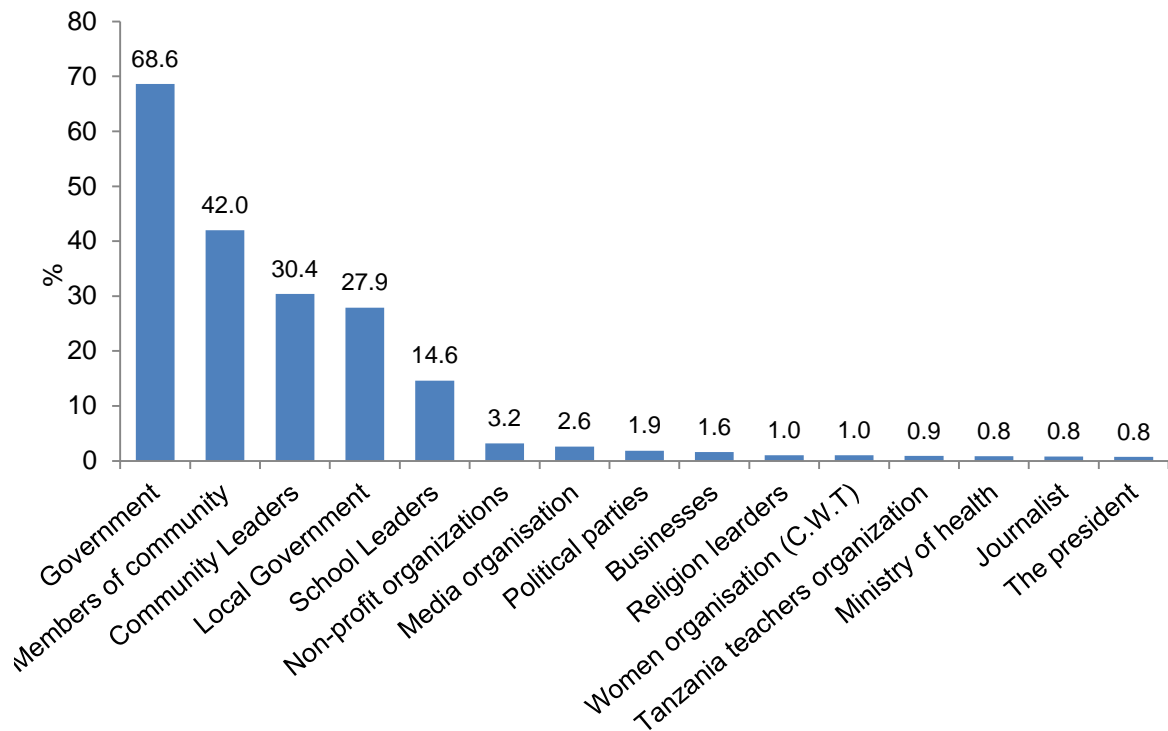
Decision makers were asked both about whether they had seen action being taken as a result of information published in the media and if they had personally taken action themselves (see Graph 4.22). More than half (58.1%) of the decision makers were aware of action taken, considerably more than the community sample (32.3%). More than a third (39.1%) of these leaders had taken action based on an issue of direct bearing on them, in their subject area, being published in the media.

Turning back to those decision makers who witnessed action being taken by someone else, Graph 4.23 displays who they recalled having taken the action and Graph 4.24 illustrates what type of issue the action was linked to. Government topped the list (68.6%) followed by members of the community (42.0%), community leaders (30.4%) and local government (27.9%). Actions linking to social issues were most likely to have been noticed, followed by health and educational issues. When it came to action personally taken, social issues still topped the list but environmental issues were more likely to have inspired personal action than health or educational concerns. Educational issues however, were still the third most likely subject area to provoke action.

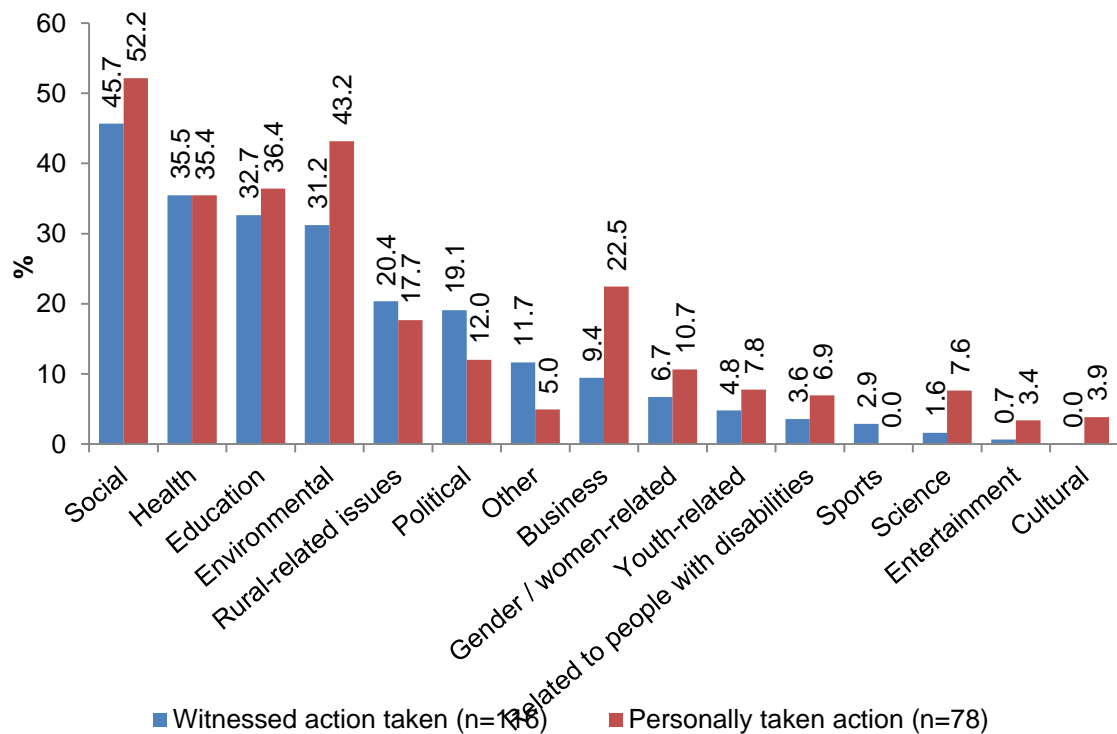
Graph 4.22: Percentage witnessed action or personally taken action due to exposure by media publications (n=200)



Graph 4.23: Group or individual who took action over issue revealed in media (n=116)



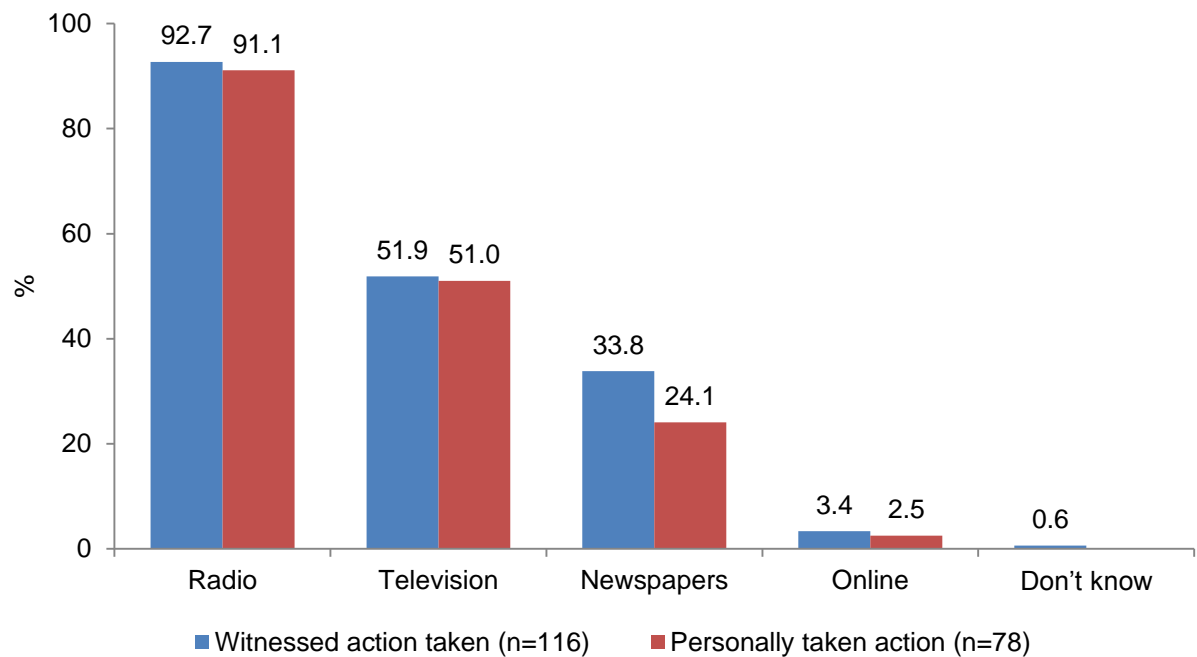
Graph 4.24: A comparison of the types of issues linked to action taken by others and personally



The majority of the decision makers (60.1%) indicated that they did not take any action personally in their role as a community leader. A third of them however indicated that environmental, social, health and educational areas would most likely be the topics to ignite action from them in the future. Rural and political-related issues could potentially motivate just under a quarter of those who had not taken any action before. In contrast to the apathy shown by the community sample, only 10.9% of these leaders indicated that nothing could motivate them to take action.

Turning back to those who did take action, as well as the action witnessed by others, the type of media which reported the issue inspiring action followed the same trend in terms of media exposure. Issues were most likely to have been reported on the radio, followed by television and finally the least likely medium was via newspapers (see Graph 4.25).

Graph 4.25: Type of media which reported the issues inspiring action

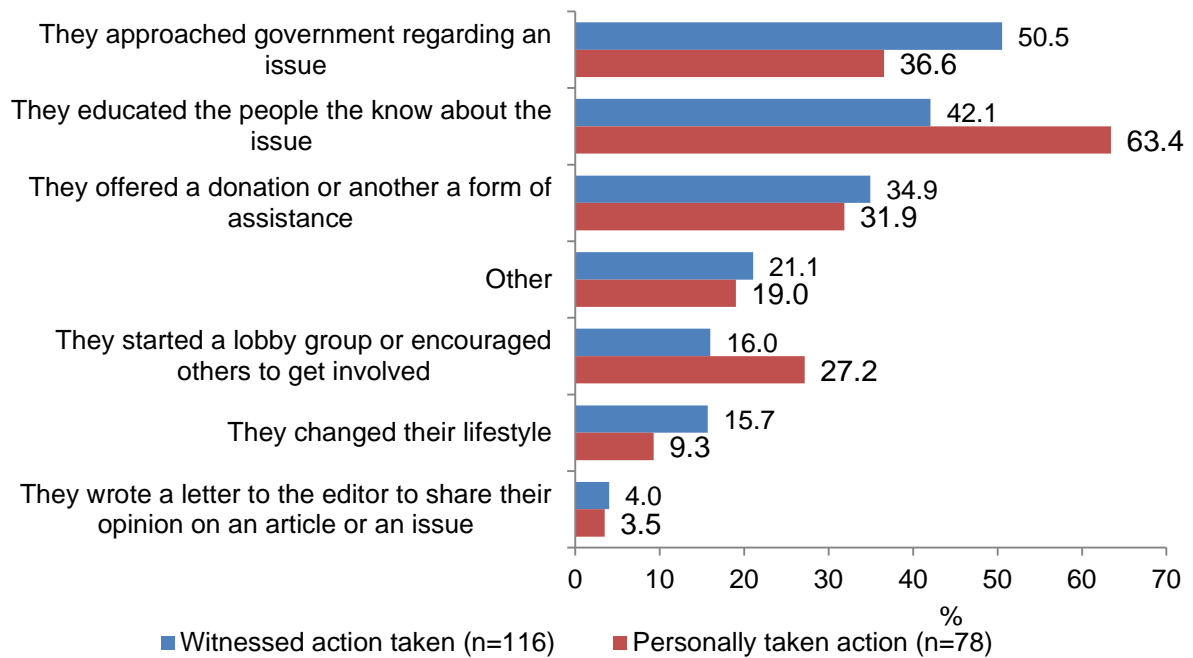


Turning to what action in particular was taken, educating others by far topped the list for personal action while approaching the Government regarding an issue was the most common action witnessed by those observing others take action (see Graph 4.26). Whether it was action witnessed or personally taken, educating others on the topic was without a doubt the most common response. Offering donations or assistance was the third most common action taken both personally and observed in others.

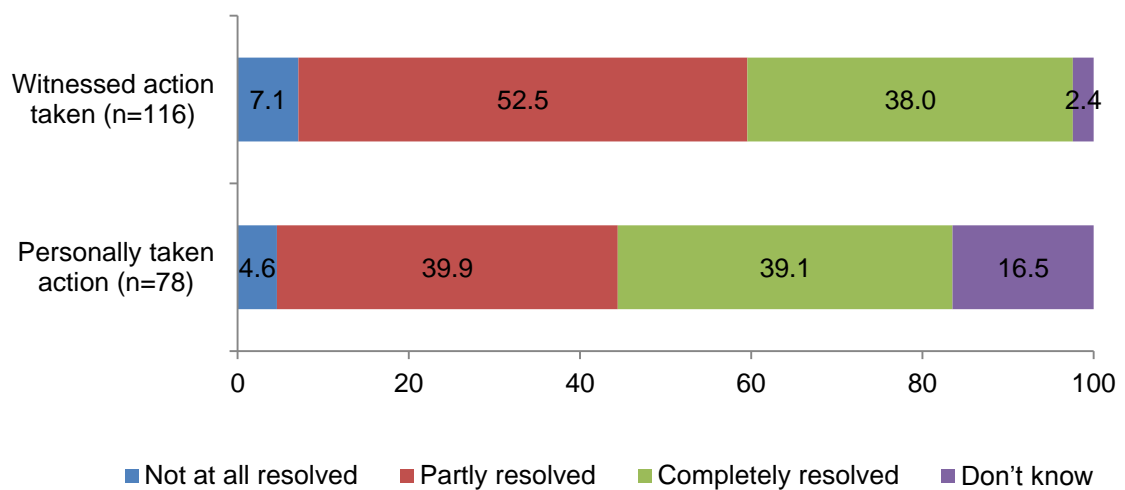
In order to understand the impact the action taken has had on resolving the issues, an effectiveness index was calculated. The index takes into account that some issues are not resolved at all, others are partly resolved and some are completely resolved. This index ranges from 0-100 with 0 being not effective at all to 100 being effective resolution.

The resulting index for action taken by others was 65.9%, while the impact from action personally taken was more positive sitting at 70.7%. It is likely that there was higher interest in noticing the impact of one's own action than that of others, hence a higher index for action taken personally. The distribution of answers which gave input to the index can be viewed in Graph 4.27.

Graph 4.26: Types of action witnessed or personally taken as a result of issues published in the media



Graph 4.27: Extent to which issue was resolved after the action taken by others



With respect to personal action taken, in 40.3% of the cases which were partly or completely resolved, the media did report on the resolution of the issue. A much larger proportion (63.7%) of the cases which were partly or completely resolved as a result of action taken by others, were reported in the media.

Decision makers were asked about whether they personally had received any negative or positive exposure in the media. A very small portion (6.2%) had received negative publicity while a higher 14.5% had received positive publicity in the past. Samples were too small to explore these aspects in more detail.

## Chapter 5: Study Limitations and Lessons Learnt

The previous chapter discussed the results of the study. To understand the results in context one must take cognizance of the limitations of the research which are outlined in this chapter. The limitations of the study include questionnaire translations and sampling limitations.

The questionnaire was designed in English and translated into Kiswahili. Two independent professional translators who have experience with research questionnaires were engaged for the translation process. Two translators independently forward translated the English questionnaires into Kiswahili. These translators compared their respective translations and discussed and resolved any disparities. A multilingual, experienced project manager who participated in the questionnaire development worked together with the translators to finalize the Kiswahili questionnaires. In spite of a thorough process to the point of having a questionnaire fully translated into Kiswahili, an important additional step would have prevented some interpretation problems during fieldwork. What was missed was back-translating the Kiswahili questionnaire into English by an independent translator who had not been exposed to the English version. This translation should then have been compared to the original English questionnaire and discrepancies resolved. Since this step was missed, a problem with the translation of one of the rating scales was experienced.

The scale was the 'Just Right' scale used in coverage questions. The scale options were as follows in English:

- Far too much coverage
- A bit too much coverage
- Just the right amount of coverage
- Too little coverage
- Almost none / no coverage

Unfortunately, when translated "Just the right amount of coverage" was incorrectly translated to be average and "A bit too much coverage" was perceived by most to more accurately reflect the "perfect" or "correct balance of coverage". As such initial results showed a skew to the "Too much coverage" end. Hence when the coverage index was calculated, there were no results on the "Too little coverage" end which was logically incorrect, particularly when looking at topics such as rural-related issues and those pertaining to people with disabilities. Hence adjustments were made to the scale by a statistician to pull the scale back towards a more normal distribution. The same adjustment was applied to all questions with this Just Right rating scale as an answer response. The adjustment worked well in most cases but for the question probing the level of coverage given to local, national and international voices, the index remained on the "Too much coverage" end or "Just right" point. Although this could be the reality, one must take cognizance of the fact that the scale was misinterpreted and could have been interpreted differently from respondent to respondent and the adjustment can never replace the answers that could have been given if the translation and interpretation were as per the English version. Going forward, this scale needs to be correctly translated and extra special attention paid to this in the interviewer training to ensure correct interpretation. Similarly, the subsequent coverage indices calculated in future measures need to be interpreted relative to the baseline with caution. Once a third measure is taken a more accurate evaluation of changes in this area can be assessed.

Apart from the questionnaire, the sample frame was based on the 2002 Tanzania Population and Housing Census, given the 2012 projections. The lack of more recent census data posed a limitation in designing an up to date representative sample for the general public component. However, given that subsequent years will follow the same methodology the relative comparison of results will serve the objectives of the study.



## Chapter 6: Measurable Indicators

In order to determine the level of success achieved by TMF in supporting the Tanzanian media, certain measures need to be tracked over time, with the aim of setting goals or targets in various areas. This study serves as the baseline for such measures, and future surveys will be able to use this to pinpoint the level of success from this baseline point.

Two core focuses emerge within the primary objective of supporting and growing the media in Tanzania, namely ensuring the quality of the media is high enough, and that the media is contributing to domestic accountability. The summary below into the indices reflecting the baseline scores will therefore be split into these two sections.

### 6.1 Perceptions of Quality of Media

#### 6.1.1 Positivity Index

The general public and decision makers were asked about their top of mind impressions of Tanzanian media overall as well as television, newspapers and radio. They had to indicate whether they felt the media has been improving or declining over time. An index was created to summarize these impressions. The index ranges from 0-100, with scores closer to 100 showing more positive top of mind impressions overall, and of each media type. This index has been called the positivity index as it is not a measure of quality itself but rather the way media is improving over time.

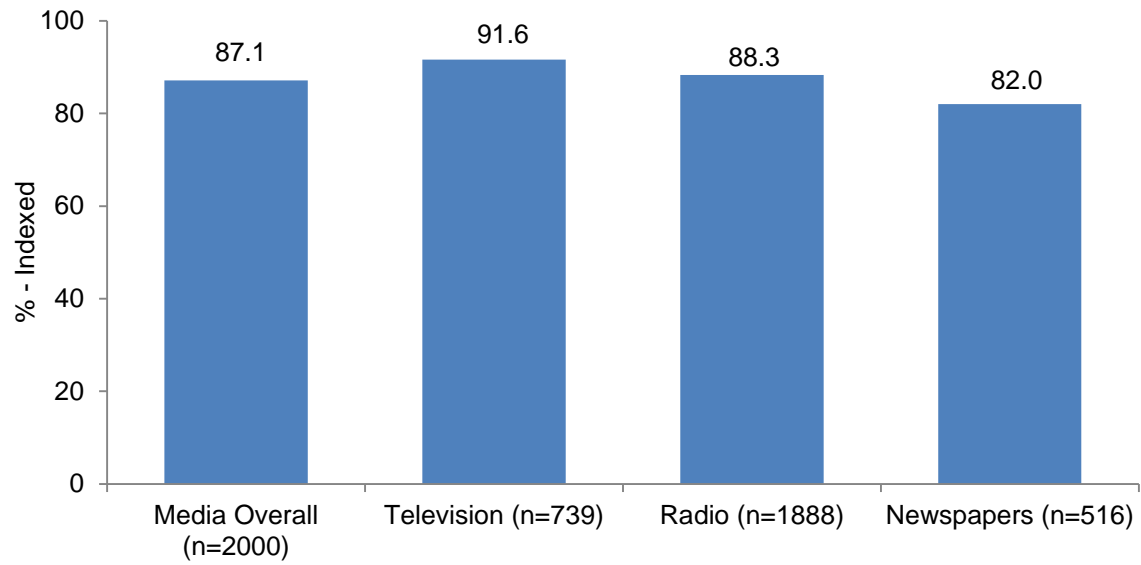
The positivity index of the Tanzania media was extremely high amongst both the community as a whole (87.1%) and the decision makers (90.0%). While a high score is obviously desirable, this trend has been seen with most other research conducted by Ipsos Synovate where Tanzanians typically rate products and performances highly. It means that the vast majority of respondents are already in the 'top two box' (rating the media as 'on its way up and has a lot going for it' or 'on its way up and has a few things going for it') and so improvements will be hard to come by. As such, targets need to be realistic.

Looking at the different types of media, television clearly has the least room for improvement. However, this medium does not reach a very high proportion of Tanzanians, and as such, greater reach could be more of a goal for this medium than improving the perception of existing viewers. However, where financial barriers are preventing viewing, this is not something within TMF's scope.

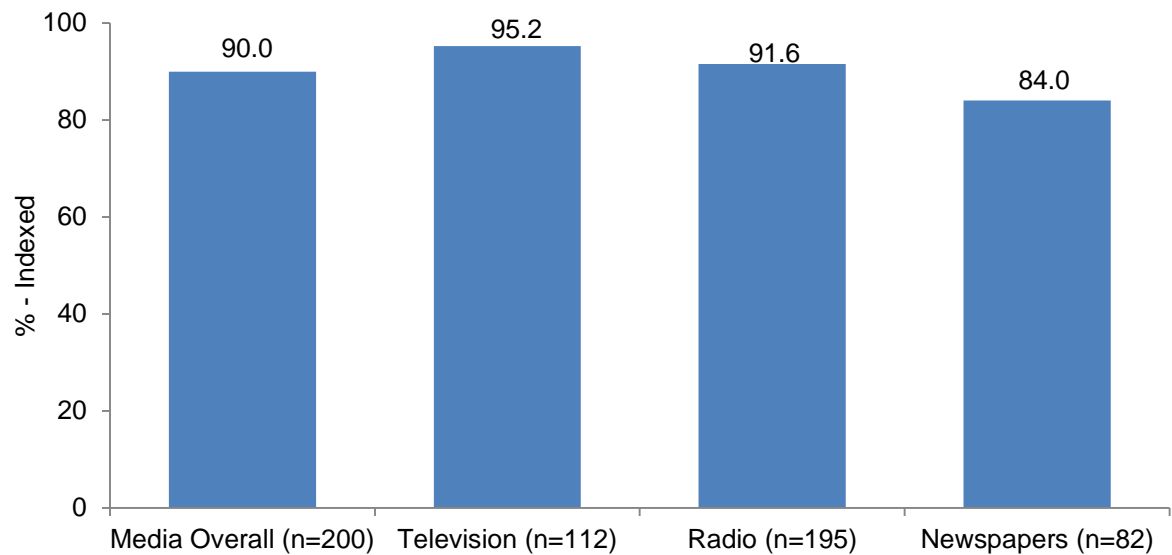
Radio is the most used media format, and is highly rated by the majority, particularly amongst decision makers (88.3% by community, 91.6% by decision makers). Given that radio has a very wide reach and that its ratings are already high, improvements here will be particularly small.

The highest targets can probably be set for newspapers. With the lowest reach coupled with the lowest top of mind perceptions, newspapers are furthest from satisfying the needs of the Tanzanian community (82%), with the ratings by decision makers not significantly better (84%).

Graph 6.1: Positivity index for the Tanzanian media amongst the community (n=2000)



Graph 6.2: Positivity index of the Tanzanian media amongst the decision makers (n=200)



The positivity index for the community sample was reviewed across various demographic splits. Graph 6.3 displays the positivity index by setting and region. For the media overall there are few differences apart from the Southern region, which is substantially less positive (75.7%).

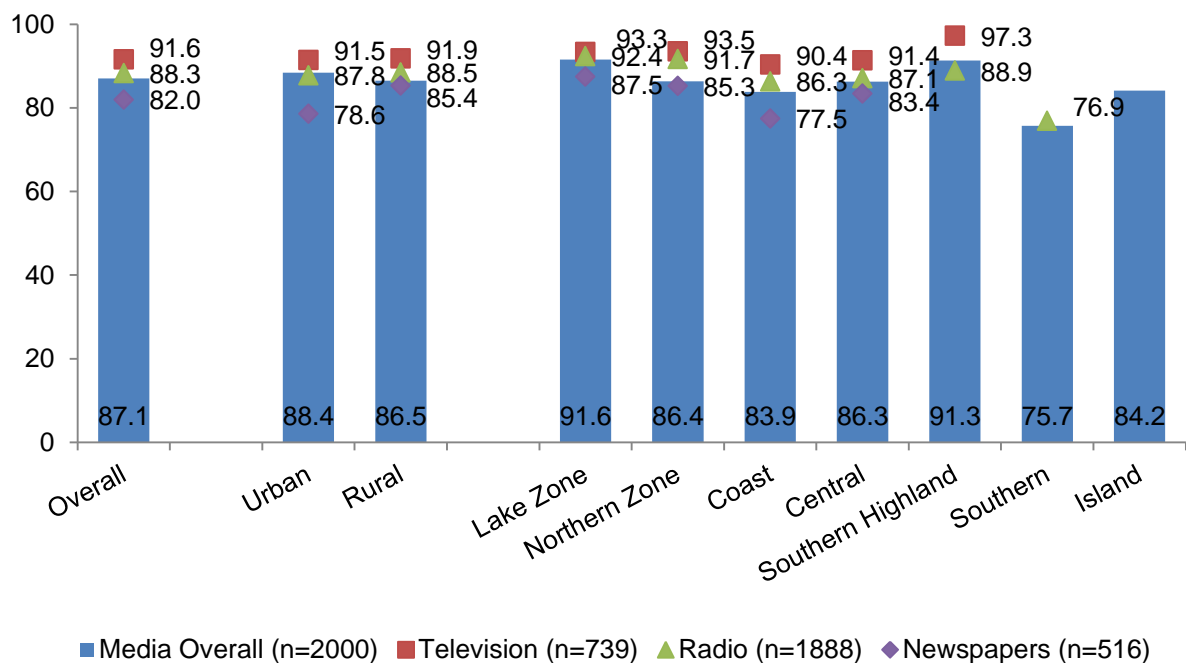
When looking at how optimistic Tanzanians are about improvements of each media type, more interesting results emerge with respect to impressions of newspaper as a medium. Tanzanians in urban areas are far less optimistic than their rural counterparts (78.6% vs. 85.4%) about the improvement of local newspapers. Similarly, coastal Tanzanians (77.5%) are decidedly less optimistic.

Impressions about television and radio are very similar and generally positive across region and setting. It is only in the Southern region where residents are significantly more negative about radio (76.9%).

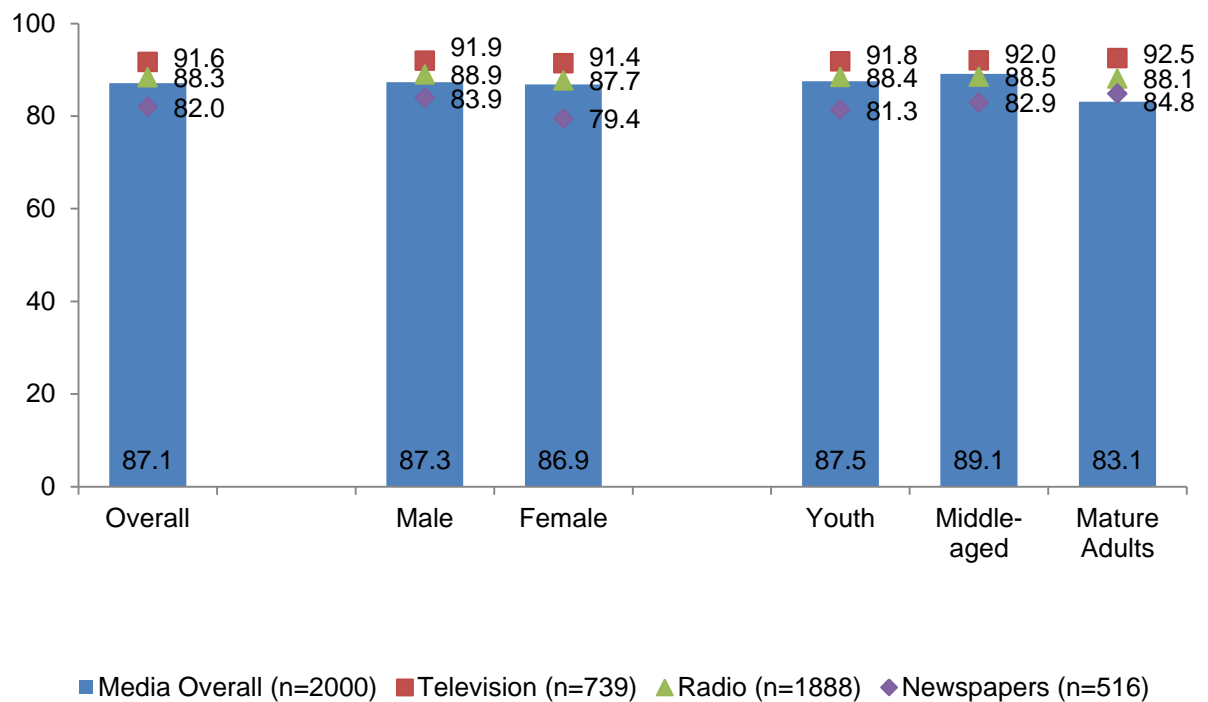
No significant differences are evident across age and gender lines. Although females (79.4%) tend to be slightly less optimistic about newspapers than males (83.9%), this difference is marginal. See Graph 6.4 for the positivity index results by age and gender.

Graph 6.3: Community positivity index for Tanzanian media by region and setting.

Note: Results excluded if base <80.



Graph 6.4: Community positivity index for Tanzanian media by region and setting



### 6.1.2 Quality index

The overall quality index is an indexed score based on perceived performance on the following attributes:

- Trustworthy
- Independent,
- Transparent,
- Vibrant,
- Top Quality,
- Professional,
- Objective,
- Diverse Content
- Critical Thinking
- Accurate

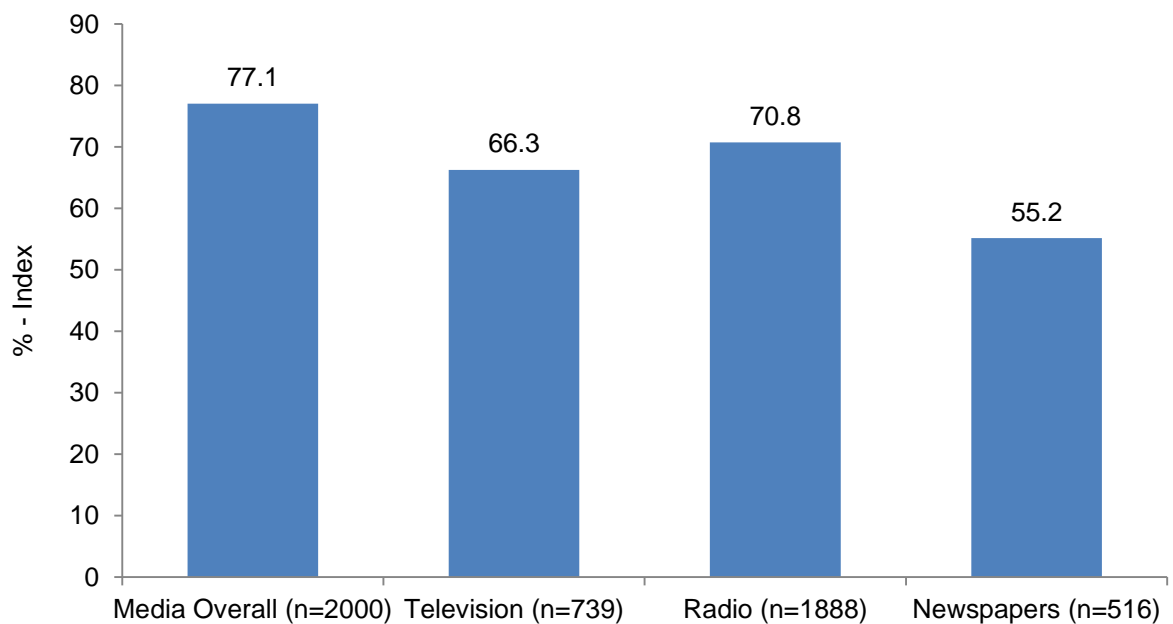
Each of these attributes carries on equal weight in the quality index as weighting the attributes (which would have to be adjusted as importance changes) would make tracking of changes impossible. The index ranged from 0 to 100 with 0 indicating very poor quality and 100 excellent quality.

It was interesting to see that, although the overall media recorded a reasonably high rating of 77.1%, the three media formats were less well received. Radio once again was the least criticized of the three, with scores of 70.8% from the community and 66.4% from decision makers. But these scores, whilst better than television and newspapers, still clearly leave room for improvement.

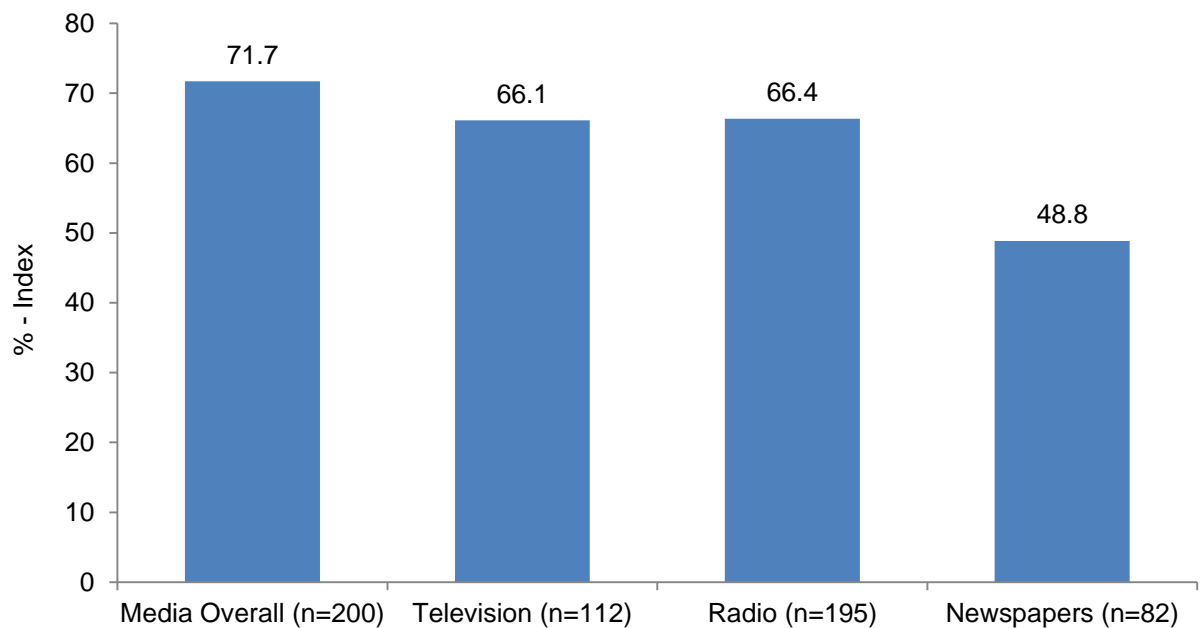
Newspapers reported a very average quality rating. With 55.2% from the community and an even more worrying 48.8% from decision makers, it is unlikely that the quality of newspapers is likely to inspire trust, loyalty and action from its readers.

Looking at specific attributes, it is clear that objectivity and quality are the two attributes which need to be addressed most urgently – across all media forms. With the media’s responsibilities in ensuring accountability, the perceived lack of objectivity is particularly worrisome.

Graph 6.5: Overall quality index for Tanzanian media amongst the community (n=2000)



Graph 6.6: Overall quality index for Tanzanian media amongst decision makers (n=200)

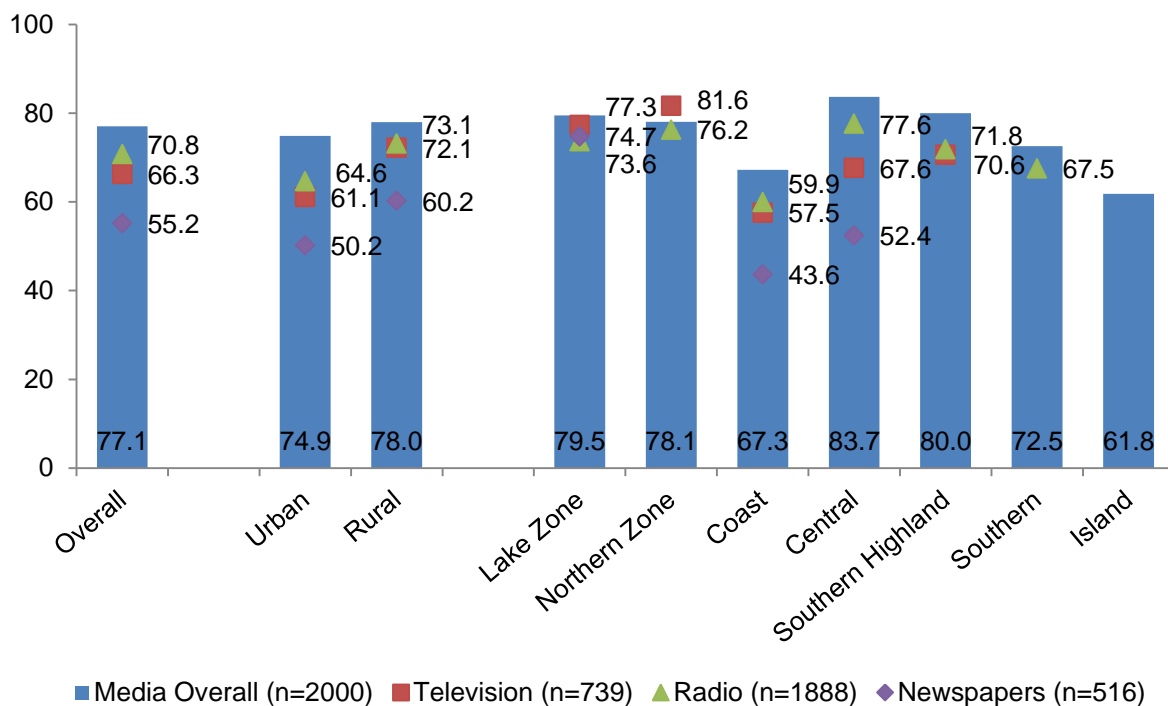


For the community sample, distinctions across urban and rural lines showed that urban Tanzanians are far more critical than their rural residents, with significantly lower scores for urban than rural across all media types (see Graph 6.7). Regional differences must be treated with caution given the low readership at this level but it is clear that the quality indices calculated for the Coastal area are lower than other regions. The Coastal index for newspapers in particular illustrates a below average quality for this medium. Given that this region is also more affluent and urban than other regions it is also not surprising that it has a lower score given the urban and rural distinctions.

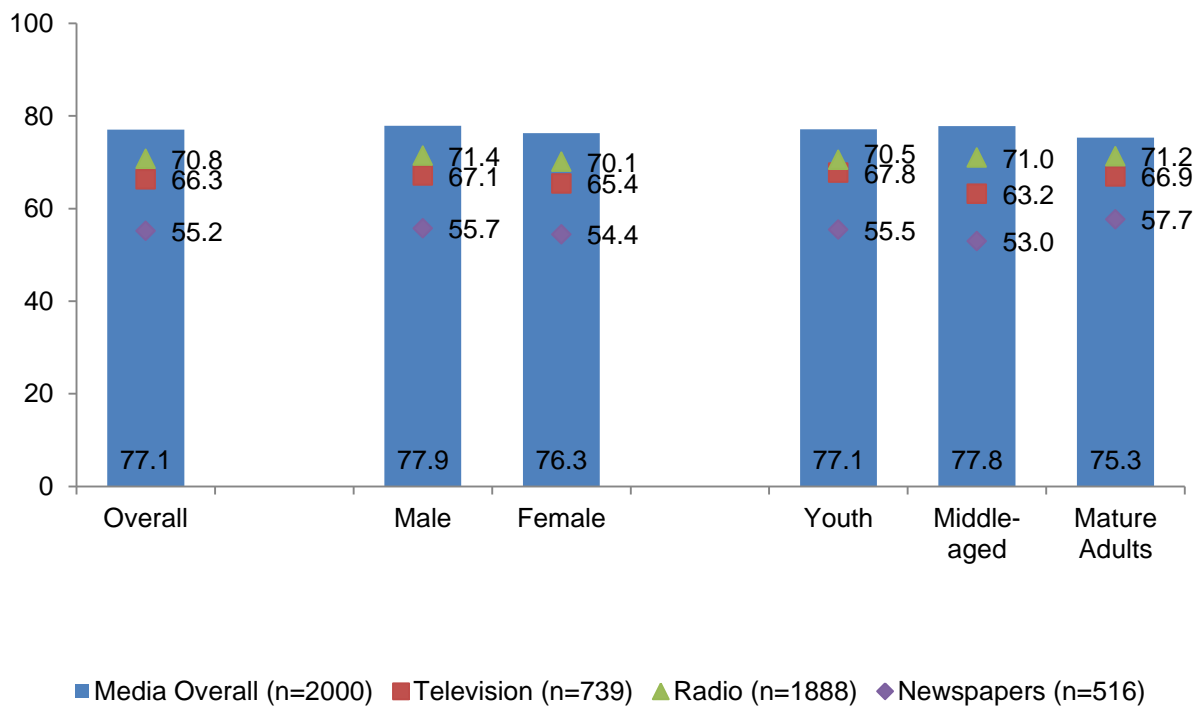
No substantial differences in the quality index were obvious across gender and age lines (see Graph 6.8).

Graph 6.7: Community quality index for Tanzanian media by region and setting

Note: Results excluded if base <80.



Graph 6.8: Community quality index for Tanzanian media by age and gender



### 6.1.3 Diversity of coverage by ‘Voice’ index

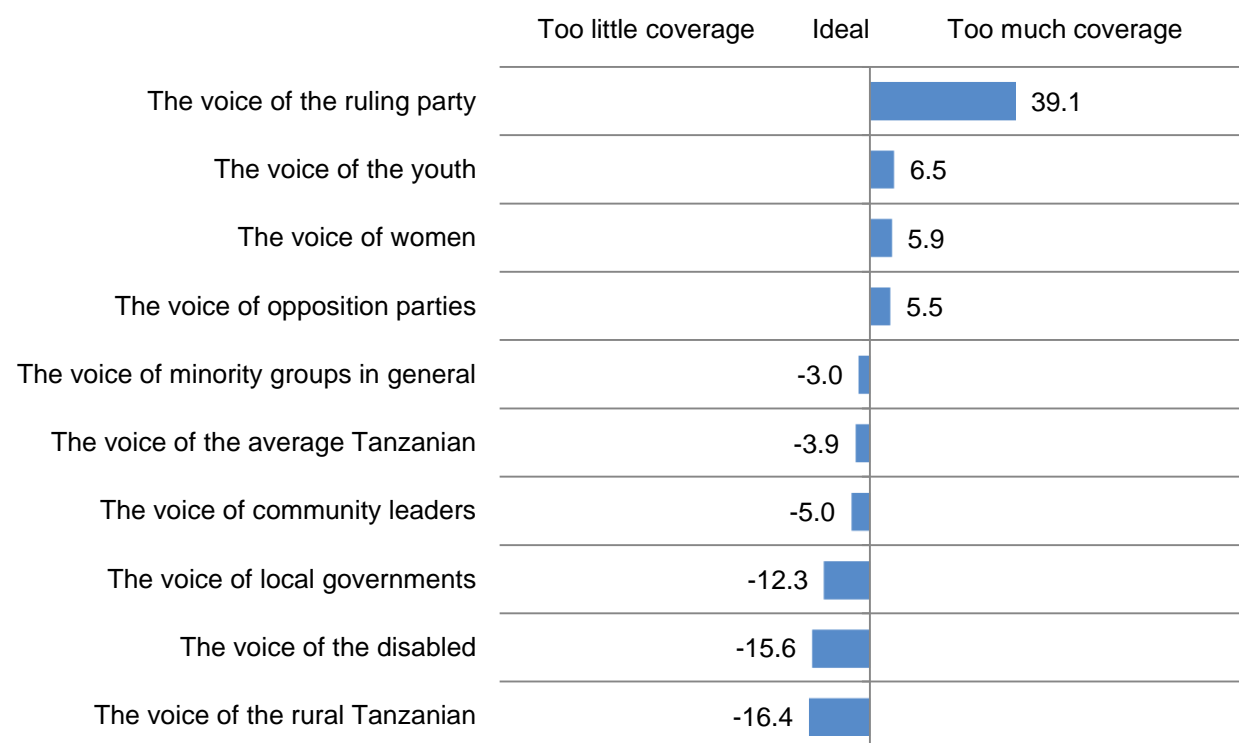
A diverse, representative media gives ‘voice’ to all segments of the community adequately. This is a delicate balancing act in order to get the correct amount of coverage of each of these voices.

Another aspect of voice was the balance between local, national and international voice in the media. Respondents were also asked to rate their satisfaction with the amount of coverage afforded each of these voices.

Indices were created for both these aspects. The index ranges from -100 to +100 where -100 indicates too little coverage, 0 signifies just the right amount of coverage and +100 is too much coverage.

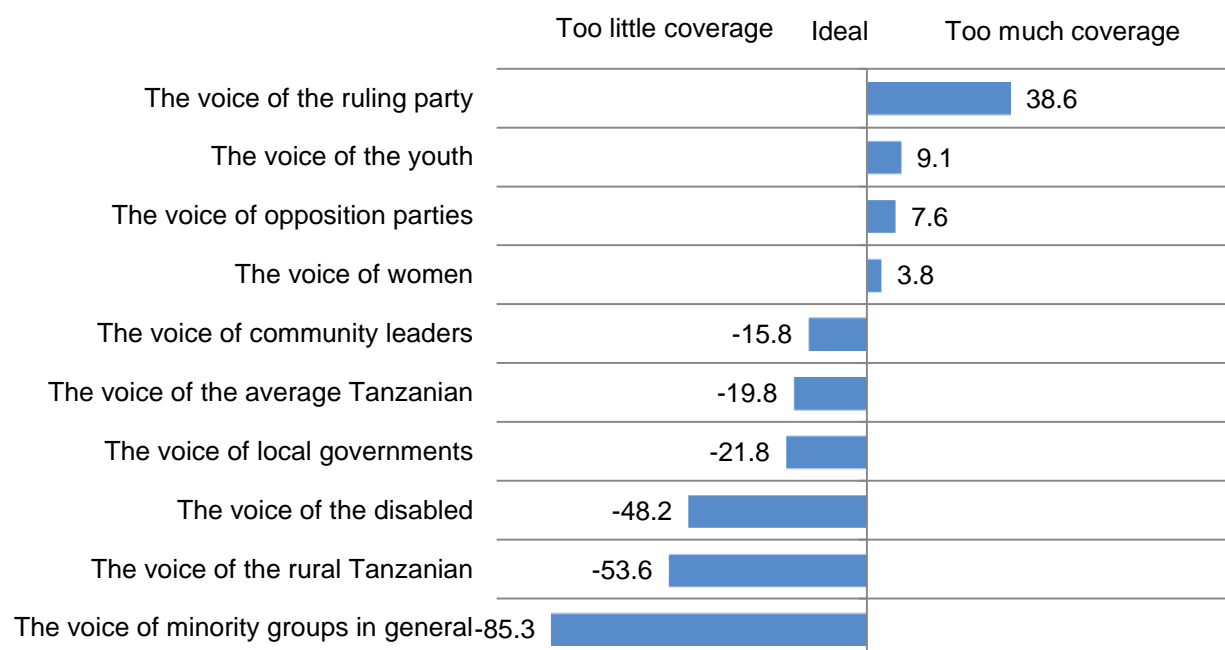
The indices indicate that both the community and decision makers perceive only one voice to be too dominant in the Tanzanian media – that of the ruling party. The voice of the ruling party is not ignored, but the amount of coverage given to this is deemed to be unbalanced. In fact, there are a number of voices that are given coverage that the community feels is quite acceptable, including the voice of women, the youth and minority groups in general. The decision makers vehemently disagree however, feeling that the latter is very lacking in coverage. Decision makers would also like to see more news relating to rural Tanzanians and the disabled – some increase in coverage in these aspects would also positively impact perceptions amongst the community as a whole.

Graph 6.9: Diversity of coverage by voice amongst the community (n=2000)





Graph 6.10: Diversity of coverage by voice amongst decision makers (n=200)



Looking at the media coverage by voice index by gender, setting and age (see Table 6.1 and 6.2), no substantial differences emerge apart from opinions regarding the coverage of youth and women where urban Tanzanians perceive there to be more coverage of these voices than their rural counterparts. Women are of the opinion that voices of the women get more coverage than what is reasonable while men feel that these voices get just the right amount of media coverage.

Table 6.1: Community coverage by voice index for the various voices among the Tanzanian public split by setting and gender

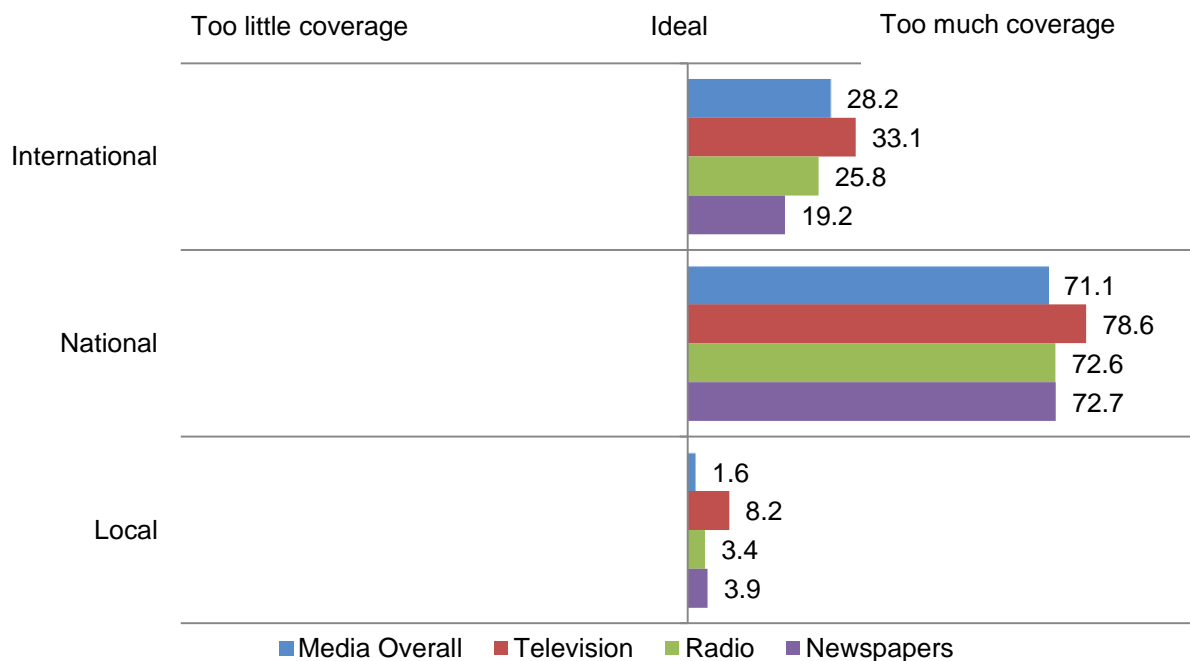
Tanzanian Voices	Overall General Public (n=2000)	Setting		Gender	
		Urban (n=600)	Rural (n=1400)	Male (n=967)	Female (n=1033)
The voice of the ruling party	39.1	39.0	39.2	41.0	37.3
The voice of the youth	6.5	14.9	2.9	5.1	7.8
The voice of women	5.9	15.2	1.9	0.7	10.6
The voice of opposition parties	5.5	6.5	5.1	4.8	6.1
The voice of minority groups in general	-3.0	-0.2	-4.2	-1.4	-4.5
The voice of the average Tanzanian	-3.9	-3.0	-4.3	-4.1	-3.7
The voice of community leaders	-5.0	-1.8	-6.4	-6.9	-3.2
The voice of local governments	-12.3	-12.8	-12.1	-11.9	-12.8
The voice of the disabled	-15.6	-17.4	-14.8	-15.0	-16.1
The voice of the rural Tanzanian	-16.4	-16.6	-16.3	-15.5	-17.2

Table 6.2: Coverage index for the various voices among the Tanzanian public split by age

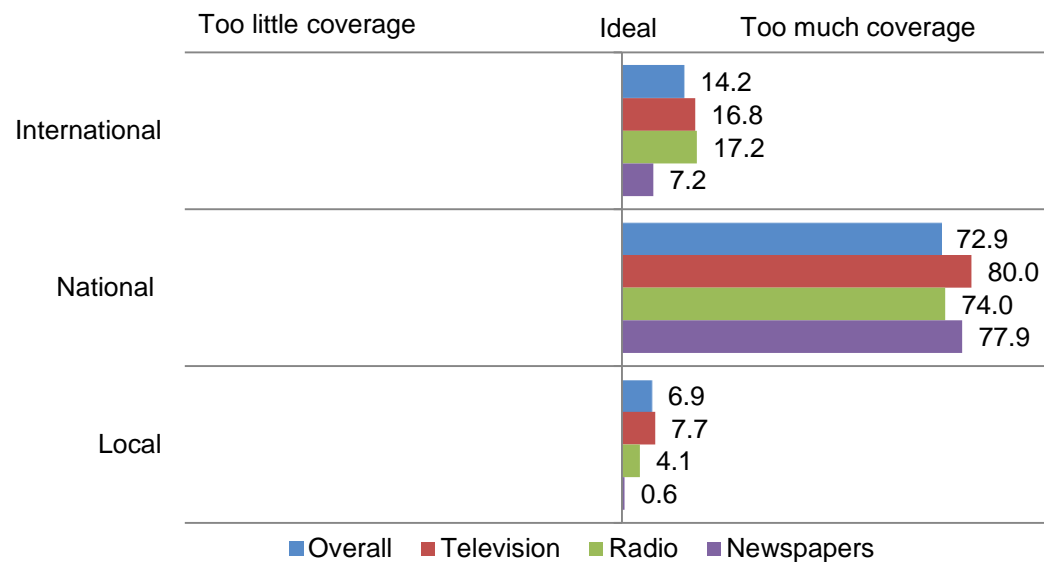
Tanzanian Voices	Overall General Public (n=2000)	Age		
		Youth (n=1062)	Middle-aged (n=632)	Mature Adults (n=254)
The voice of the ruling party	39.1	38.1	40.3	43.4
The voice of the youth	6.5	8.8	3.3	5.3
The voice of women	5.9	6.5	4.8	7.0
The voice of opposition parties	5.5	6.8	5.4	1.6
The voice of minority groups in general	-3.0	-5.3	-0.2	-0.2
The voice of the average Tanzanian	-3.9	-3.7	-2.6	-11.0
The voice of community leaders	-5.0	-6.0	-5.1	-2.7
The voice of local governments	-12.3	-12.6	-13.9	-5.5
The voice of the disabled	-15.6	-17.5	-14.3	-12.4
The voice of the rural Tanzanian	-16.4	-20.2	-12.1	-14.5

The community and decision makers' coverage index for local, national and international topics of interest (see Graph 6.11 and 6.12) indicated that local issues were getting close to the ideal amount of coverage. National issues dominated media content and international issues were also perceived to have more coverage than desired.

Graph 6.11: Coverage index for local, national and international news amongst the community



Graph 6.12: Coverage index for local, national and international news amongst decision makers



For the community coverage index, at a regional level, some interesting differences were apparent (see Table 6.3). The Lake Zone (-8.8) and Central regions (-6.4) felt an under coverage of local news. In the Lake Zone this was in particular with regards to radio and television coverage while in the central region it was mainly radio which fell short on local issues.

Table 6.3: Community coverage index for local, national and international news among the Tanzanian public split by region

Media coverage	Region						
	Lake Zone	Northern Zone	Coast	Central	Southern Highland	Southern	Island
<b>Overall</b>	<b>n=580</b>	<b>n=235</b>	<b>n=315</b>	<b>n=359</b>	<b>n=268</b>	<b>n=184</b>	<b>n=60*</b>
International	37.1	23.7	22.1	30.2	28.1	19.2	8.6
National	68.4	78.0	58.6	73.6	76.6	72.2	89.0
Local	-8.8	9.7	3.5	-6.4	10.8	7.3	50.4
<b>Newspapers</b>	<b>n=68</b>	<b>n=95</b>	<b>n=160</b>	<b>n=139</b>	<b>n=89</b>	<b>n=57</b>	<b>n=32</b>
International	**	28.1	11.0	18.3	26.0	**	**
National	**	82.6	65.0	71.6	76.0	**	**
Local	**	13.4	15.1	-2.8	-5.3	**	**
<b>Radio</b>	<b>n=563</b>	<b>n=228</b>	<b>n=285</b>	<b>n=352</b>	<b>n=258</b>	<b>n=184</b>	<b>n=60*</b>
International	40.6	13.4	11.5	30.1	20.2	18.0	22.8
National	71.8	73.6	59.2	78.6	77.5	73.0	81.3
Local	-10.8	12.8	15.4	-5.7	14.0	7.2	43.8
<b>Television</b>	<b>n=111</b>	<b>n=137</b>	<b>n=202</b>	<b>n=159</b>	<b>n=120</b>	<b>n=53</b>	<b>n=60*</b>
International	44.0	36.3	25.2	32.4	43.9	**	21.4
National	83.3	87.7	67.2	81.0	75.9	**	83.3
Local	-25.1	17.0	12.8	4.7	10.6	**	51.6

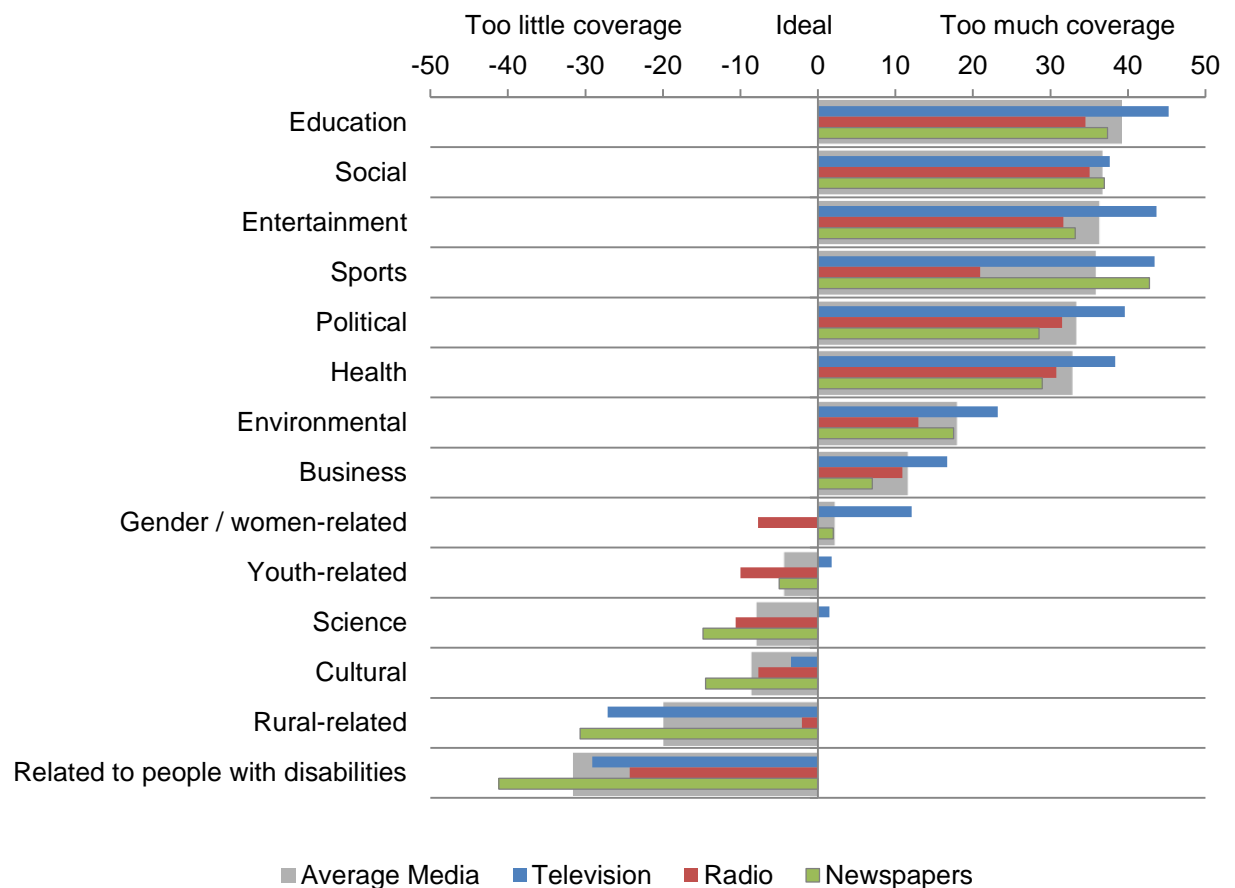
\*interpret with caution; \*\*results excluded due to being unreliable

### 6.1.4 Diversity of content index

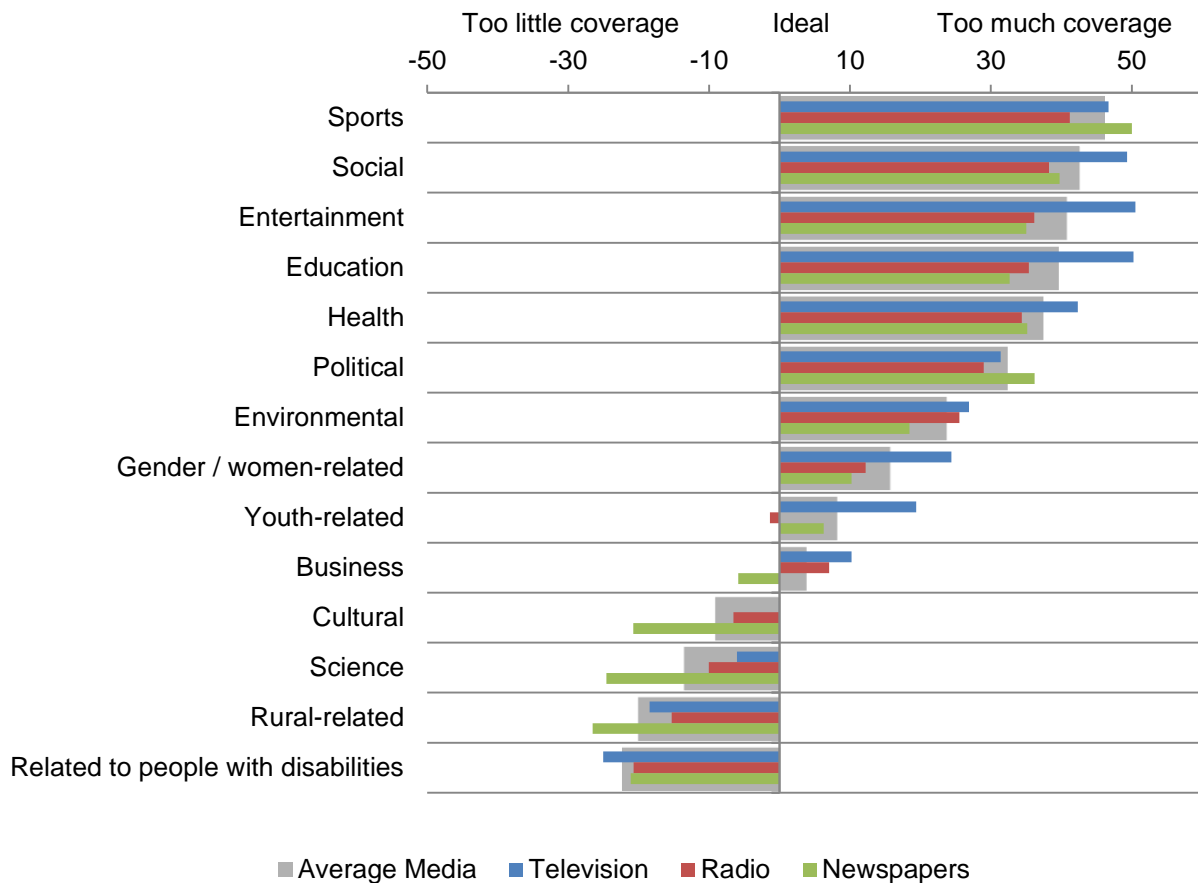
The community and decision makers' samples were probed on how well Tanzanian media covered a diverse number of topics. An index for the diversity of content was created which ranged from -100 to +100, where -100 indicated under-coverage, 0 an ideal amount of coverage and +100 more coverage than expected.

Media reporting on news related to people with disabilities (see Graphs 6.13 and 6.14) is found to have the least amount of coverage, in spite of a high level of interest in the topic. Newspapers in particular are perceived to under-report topics related to people with disabilities. Rural-related news is the second most under-reported content but only on television and newspapers. Rural issues are sufficiently covered on radio. Science and cultural issues would also benefit from more coverage although interest in these areas is the lowest. The more popular topics such as health, social and entertainment do get sufficient coverage. Media content leans a bit too heavy on the political side, which is an area of little interest to most.

Graph 6.13: Diversity of content as perceived by the community



Graph 6.14: Diversity of content as perceived by decision makers



## 6.2 Perception of the media's contribution to domestic accountability

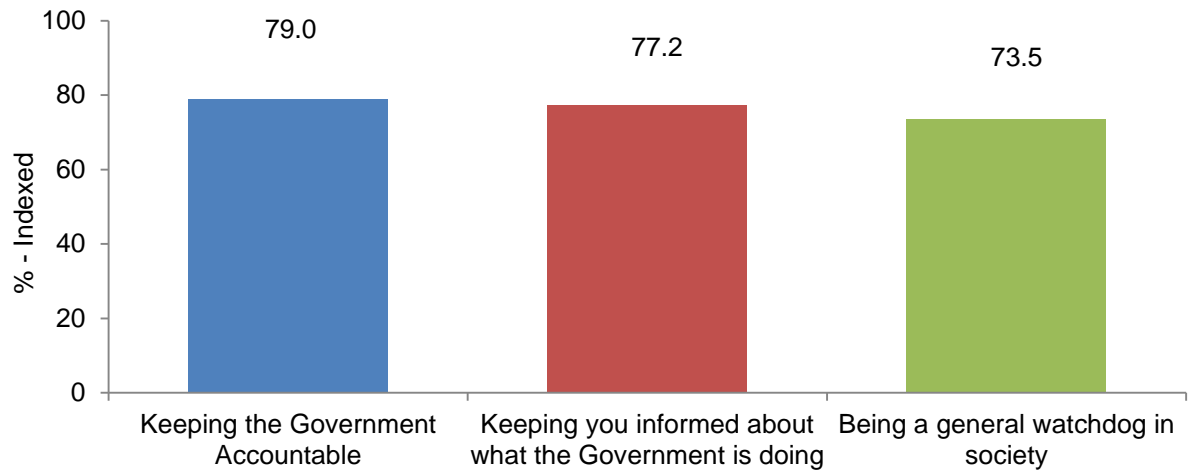
### 6.2.1 Media success index for creating accountability

An index was created regarding the perceived success of the media in creating accountability. The index ranged from 0 to 100 where 0 would mean unsuccessful and 100 would be very successful. The resulting index was in the seventies for all three accountability statements.

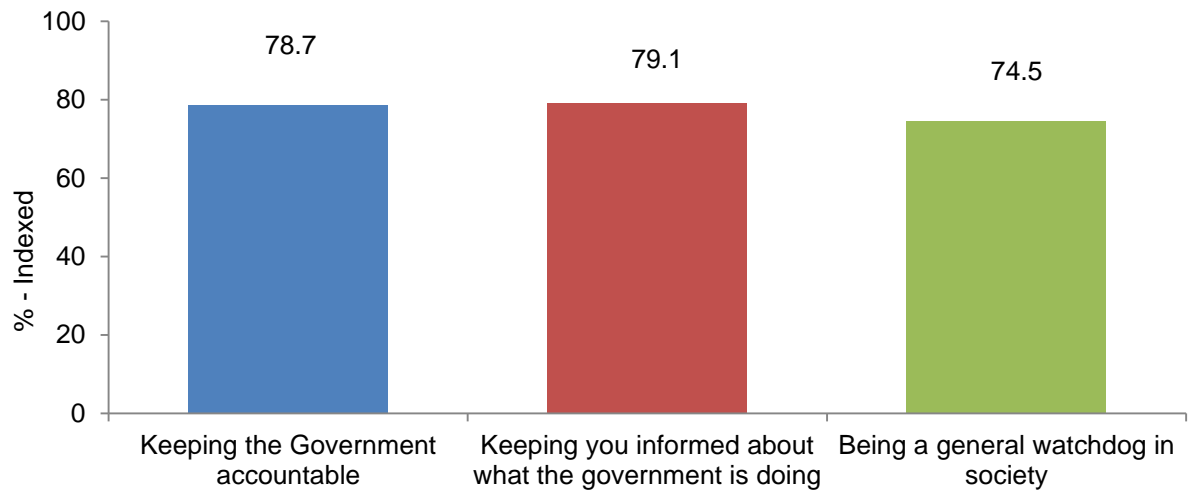
Few respondents in either the community or the decision makers' survey did not agree that the media plays a vital role in ensuring accountability by those in influential positions in Tanzania. Earlier results suggest that objectivity may be an issue, and that the voice of the ruling party is too dominant in the media, yet the generous Tanzanian public and decision makers still feel that media is succeeding in helping to keep the Government accountable as well as keeping them informed about its actions.

Slightly lower ratings for the media's role in playing watchdog in society were recorded. This may be as a consequence of the limited voice given to some groups such as minority groups, that they are not perceived to be keeping a close enough eye on these areas. Nevertheless the ratings over all three questions do imply a high level of perceived success, and is clearly a strong platform from which to build to greater accountability and responsibility.

Graph 6.15: Perception of media’s contribution to domestic accountability amongst the community (n=2000)



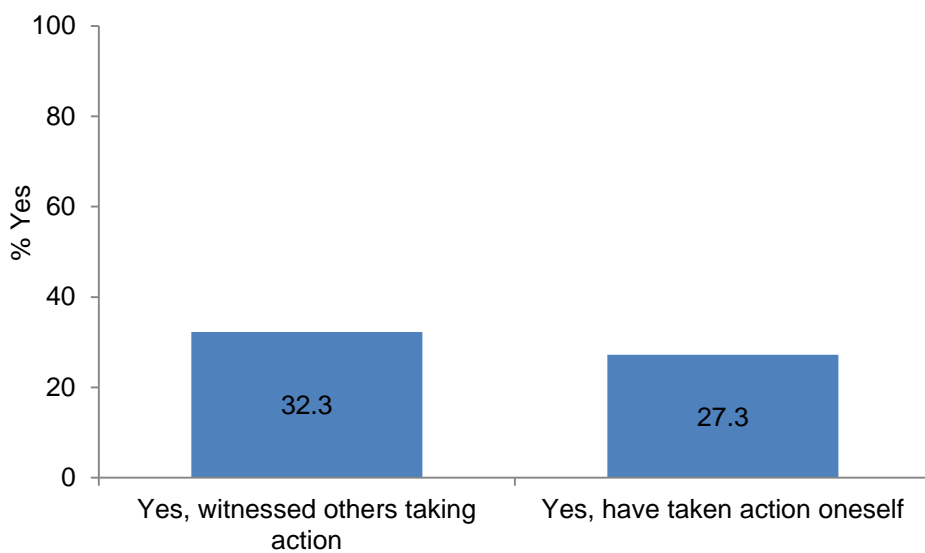
Graph 6.16: Perception of media’s contribution to domestic accountability amongst decision makers (n=200)



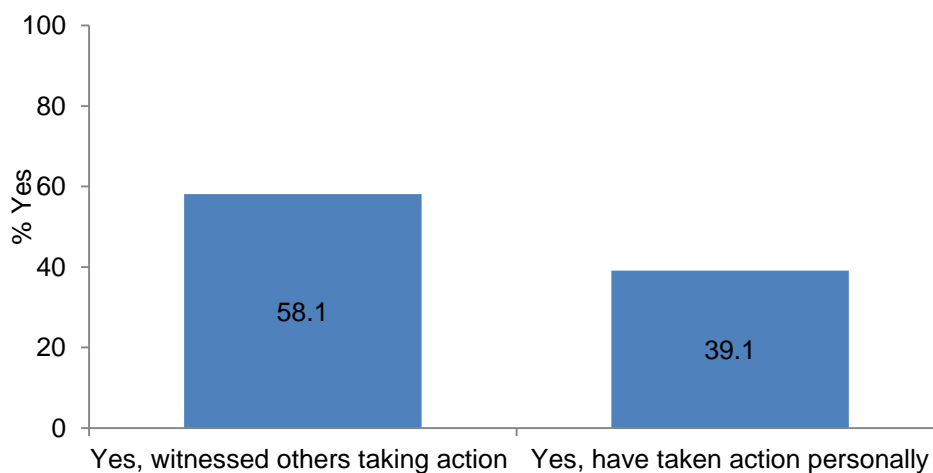
### 6.2.2 Action taken in response to media publications

Respondents were asked both about whether they had seen action being taken as a result of information published in the media and if they had personally taken action themselves (see Graphs 6.17 and 6.18). More than half (58.1%) of the decision makers were aware of action taken, considerably more than the community sample (32.3%). More than a third (39.1%) of these leaders had taken action based on an issue of direct bearing on them, in their subject area, being published in the media whilst only just over a quarter (27.3%) of the general public has personally taken action. This reiterates the importance of the media giving voice to all groups in society.

6.17: External action taken due to exposure in media amongst the community (n=2000)



6.18: External action taken due to exposure in media amongst decision makers (n=200)



### 6.2.3 Effectiveness index

In order to understand the impact the action taken has had on resolving the issues, an effectiveness index was calculated. The index takes into account that some issues are not resolved at all, others are partly resolved and some are completely resolved. This index ranges from 0-100 with 0 being not effective at all to 100 being effective resolution.

There must be some caution paid when looking at the level of resolution regarding action taken on issues reported in the media. The possibility of resolution is largely dependent on the issue, and as such, tracking improvement may well be impacted by the types of issue of the day, rather than any success or failure by the media in their reporting. A hypothetical example to illustrate this point could be a case in which a media publication highlights a shortage of schools in the Lake Zone which is impacting both quality of education and health. Overcrowded schools result in a poor teacher to pupil ratio as well as a lack of infrastructure such as toilet facilities to support the extra numbers. After publication, there is a lot of outcry in response to the news but the issue will take time to resolve as new schools cannot be built quickly. As such, there may be action being taken in the short term such as budget being allocated and funds being raised but the issue would only be partly resolved once the first school is built or current schools expanded. It will only be fully resolved when there are sufficient schools to support the need. Hence, the effectiveness index would be low – which is not necessarily a true reflection of the impact. The resolution is just more long term. In addition, particularly when action is taken by someone else, there may be varied awareness of the degree of resolution, depending on how newsworthy it is as well as other factors.

The resulting index for action taken by others was 65.9% for the decision makers sample and 63.6% for the community sample, while the impact from action personally taken was more positive sitting at 70.7% for the decision makers' sample. It is likely that there was higher interest in noticing the impact of one's own action than that of others, hence a higher index for action taken personally among decision makers.

Overall, it was felt that the action taken was successful, at least to some degree, in resolving the issue that was reported.



## Chapter 7: Conclusions and Recommendations

The baseline study outlined in this report serves to report on the current public perceptions of the media in Tanzania and provide the framework for monitoring TMF's effectiveness in increasing public appreciation of the role of the media in domestic accountability. Interventions based on these results will focus primarily on improving and promoting professional capacity.

It is out of scope of the capacity of TMF to increase media reach for television, newspapers and the internet. Solving barriers to these media, primarily literacy and affordability barriers, will continue to pose a challenge that is external to TMF's influence. However, through offering support to the media, TMF aims to drive a culture of accountability and transparency in Tanzania's public life and has at the heart of its mission the promotion of an independent, diverse and vibrant media.

Thus summarizing and looking at the way forward, this chapter will focus on the baseline indicators for quality of the media and the media's role in creating domestic accountability.

Starting with media quality, there are several levels which must be monitored and reviewed. At a very high level, it is important to keep track of the public's positivity towards media progress. The positivity index was created to provide this bird's eye view. However, results here are overwhelmingly positive leaving little avenue for improvement. It is suggested that no targets are set for positivity but that this index is still monitored into the future. Bearing in mind that as the Tanzanian public become more informed and are more exposed to better quality media, they will also become more critical which could even result in a decline in this measure. So although one could aim to keep the index between 75 and 100, which indicates an overall impression of improvement overtime, fluctuations within this range should not be interpreted negatively or without considering the context. A move below 75 however, must raise a red flag. Monitoring the indices of the media relative to each other would allow for more accurate conclusions around improvements or declines in positivity. With newspaper having the least optimistic score, the goal should be for the media indices to converge more in line with each other as newspaper perceptions improve.

Still within the topic of media quality, an index which should both have targets set and evaluated in the future is the overall media quality index. This index embodies a measure of an independent, diverse and vibrant media, which is at the heart of TMF's mission. There are ten constructs making up this crucial index, namely trustworthiness, independence, transparency, vibrancy, quality, professionalism, objectivity, diversity of content, critical thinking and accuracy. This index, which ranges from 0 to 100, with 0 being poor quality and 100 being excellent quality, should be monitored for each media type.

The results indicated a baseline quality index of 70.8 for radio among the community and 66.4 among decision makers. Television had a baseline rating of 66.3 and 66.1 among the community and decision makers respectively. A recommended target of 75 would be reasonable for both radio and television. For newspapers, however, a more realistic target would need to be set given the baseline index of 55.2 for community and 48.8 for decision makers. It is suggested that the target is set somewhere between 60 and 66 for community and at 55 for decision makers. It is further recommended that if focus is given to a particular newspaper brand that the index for this brand is calculated uniquely in future measures as a comparison versus the overall newspaper index. This will provide an additional view of success or failure of interventions per brand.

Then given the varying importance of each of the ten constructs making up the quality index, it is recommended that this is taken into account, together with baseline performance when designing interventions. So although the individual dimensions are not indicators themselves, they do provide vital insight into strong and weak performing areas and hence invaluable to informing the intervention strategies.

Baseline results highlighted that newspapers need the most attention, with focus on trustworthiness, accuracy, independence, transparency, professionalism and diversity of content being most needed as these were weak areas. Perceptions of trustworthiness will be difficult to change in the short term and this is unlikely to shift much by the next reading but perceptions of aspects such as accuracy, professionalism and diversity of content can be addressed as short term wins.

Television also requires focus on accuracy, independence, professionalism and diversity of content while radio requires interventions aimed at improving accuracy and diversity of content.

On the topic of diversity of content, baseline measures in this regard are not robust enough given the translation error of the coverage scale (see study limitations and lessons learnt section). However, the results can still be interpreted qualitatively and the core insights remain true. For target setting however, the baseline measure is unreliable. The recommendation is to ultimately aim to have at least 50% of the public indicating that the coverage is “Just Right” – in other words for each respective voice (women, rural, disabled etc.), plus the content type (social, education, politics etc.) as well as the coverage of local, national and international content, the aim is to have 50% indicating that a fair share of coverage is given to each. In terms of the coverage index, this would be a tendency closer to 0, as a negative index indicates too little coverage and a positive index too much coverage (see measurable indicators for a more detailed explanation).

Moving onto the other key area of focus, namely the role of the media in creating accountability, an index (from 0 to 100) measuring the public's overall perception of the media's success in creating accountability was created. This looked at three angles, success in keeping the Government accountable, success in keeping the public informed about what the Government is doing and success at playing the role of watchdog in society. Baseline scores were high in this area (ranging from 73.5 to 79.0) so one of two options are recommended. Firstly, the target could be to obtain a significant improvement in the index and hence t-tests should be performed between the measures of the baseline and the first future measure to gauge significance. In simple terms this is a statistical test to determine if a change in the index scores is simply a change by chance or if it is a real change which can be deemed significant. Alternatively an improvement of 5 index points for each respective measure can be set, should a simpler approach be the preference.

Still in the area of accountability but moving away from the overall perceptions was the role of the media in inspiring action based on publications. Action indicators are at two levels, one for action witnessed and another for action personally taken. Again, significance testing on proportions (chi-squared tests) could be done between the measures to gauge improvement and determine if a change in the index scores is simply a change by chance or if it is a real change which can be deemed significant. Alternatively targets could be set for community at 40% (baseline is 32.3%) for action witnessed and 34% (baseline is 27.3%) for action personally taken. For decision makers, the targets could be 65% (baseline is 58.1%) and 45-50% (baseline is 39.1%) respectively.

Lastly, an effectiveness index was calculated which ranges from 0-100, indicating how effective the action taken was at resolving the issues which inspired the action. Once again, it must be highlighted that there must be caution paid when looking at the level of resolution regarding action taken on issues reported in the media. The possibility of resolution is largely dependent on the issue, and as such, tracking improvement may well be impacted by the issue of the day, rather than any success or failure by the media in their reporting. In addition, particularly when action is taken by someone else, there may be varied awareness of the degree of resolution, depending on how newsworthy it is as well as other factors. So our recommendation is to monitor this index but to not set targets. Rather continue to interpret together with the qualitative results and within the context of the types of issues acted upon.

**References**

1. National Bureau of Statistics ([www.nbs.go.tz](http://www.nbs.go.tz)) Population and Housing Census 2002 data.
2. [www.tmf.or.tz/what-we-do/tmf-strategy-2012-2016](http://www.tmf.or.tz/what-we-do/tmf-strategy-2012-2016).
3. National Bureau of Statistics –Household budget Survey 2007(Published 2009)4 Ipsos Synovate Tanzania All Media Product Survey, 2006, 2007, 2008, 2009, 2011 and 2012.

**Appendix**

1. Kish Grid
2. Household Questionnaire
3. Decision Maker Questionnaire
4. Indicators Summary