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Report

National Media Consumption Survey Rwanda 2021

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Fojo Media Institute
Swedish Radio Media Development Office

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Partner Information

This survey was commissioned by Fojo Media Institute as part of the Rwanda Media Programme 2021-2026 – Capacity Building and Professionalisation of the media, with funding from the Swedish International Development Cooperation Agency (Sida) and the Swiss Agency for Development and Cooperation (SDC) and has been conducted by the Swedish Radio Media Development Office (SR MDO).

Fojo Media Institute (Fojo) belongs to the public Linnaeus University and is Sweden's leading centre for professional journalism training and international media development support, with a mission to strengthen free, independent and professional journalism. For more than 45 years, Fojo has held mid-career training for Swedish journalists, and has since 1991 been engaged in international media development.

The Swedish Radio Media Development Office (SR MDO) is since 1993 a side-operation to the Public Service Media (PSM) provider Swedish Radio with extensive experience in supporting media development projects around the world, to strengthen free and independent media. One of SR MDO´s areas of expertise is audience research and the implementation of its results.

Research team

The research team behind the National Media Consumption Survey has consisted of five members; presented below, led by the Rwanda Media Programme Advisor and SR MDO Project Manager, Anna Nyström. The team has had weekly update meetings throughout the Audience research process, and has collaborated solely online, due to the pandemic. The fieldwork has obviously been done on ground in Rwanda, and the presentations of top line results were also conducted on site in Kigali.

The team has been complemented by the Audience research Working group, appointed by the Rwandan Media sector during the Media Stakeholder meetings in October 2020 (described above), to anchor the process in the media sector and act as a sounding board. The group consisted of five members; presented below, representing all media categories. The AR Working group has met on five occasions, with email updates and communication in between.

The AR team:

Ms. Anna Nyström - Senior Journalist and certified Project Manager at the Swedish Radio Media Development Office (SR MDO). Anna holds a Master´s degree in Global Journalism and has 30 years' experience in journalism and 13 in international media development. Anna has worked in Rwanda since 2014 and is currently the Programme Advisor of the Rwanda Media Programme. She has been in lead of the AR process.

Mr. Magnus Anshelm - Senior Audience research expert with 35 years' experience in media research. Magnus holds a Master's a degree in Media and Communication and Sociology, and is the Managing Director of the non-profit company MMS, measuring media consumption in Scandinavia. He is a member of the Pan African Media Research Organisation PAMRO and has worked with Audience Focus Group Discussions in different projects in Rwanda since 2017.

Mr. Elias Niyonsaba - Managing Director of Ethical Research Solutions Ltd (ERS), the Rwandan research company that conducted the National Media Consumption Survey in Rwanda 2021, where Elias had the overall lead at ERS. Elias holds a Bachelor's degree in Applied Statistics and has over eight years of experience in progressive leadership and change management.

Ms. Eunice Wanderi – Research consultant and Project Manager with ten years' experience in various research methodologies and studies, including audience research. She has worked in several African markets and is experienced in designing research studies, implementing and reporting results. She is a member of the Marketing & Social Research Association (MSRA).

Mr. Michael Mwarange - Data scientist and Statistician with 14 years' experience. Michael has worked in audience research in several countries in East and Central Africa, and is well versed in survey design, data analysis and reporting results. He is a member of the Marketing & Social Research Association (MSRA) as well as the Public Relations Society of Kenya (PRSK).

The AR Working group:

Name	Media house	Media category
James Munyaneza	The New Times	Newspapers
Claudine Mahoro	TV 10	Private TV
Bernadette Umutoni Namata	KFM	Private Radio
Ildephonse Sinabubariraga	Radio Ishingiro	Community Radio
Kellen Kirungi	RBA	Public Service Media

Alex Buyinza, Project coordinator at Fojo, was instrumental in the formation of the AR Working group, in October 2020, and helped coordinate the initial meetings.

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1. Introduction

The need for national Audience research in Rwanda has been expressed by the Rwandan media sector for a long time. Some research has been conducted in the country, but primarily focusing on Kigali and other urban areas, failing to cover the rural areas where the majority of people live.

Like every media sector in the world, Rwandan media is in rapid transition. Driven by technological innovation and the deployment of new networks and services, the media industry is undergoing major changes, making it increasingly complex to operate. The entire value chain, from content production to distribution and consumption, is being altered by new processes and emerging players.

The boundaries of traditional media are gradually dissolving, giving rise to an environment in which the life cycles of content accelerate, multiply and abundance appears unlimited. Frontiers between sectors and countries are becoming blurred, and national markets are no longer separated from global, but more interdependent than ever before. Such a context, together with the speed of change and the disruption capacity of global players, is forcing well-established media business models to be revised. The pace of technology innovation results in the urgent need to launch internal transformation processes to adapt to the digital ecosystem, which is something that every media company in every country needs to align with, always with the audience in focus.

The “Rwanda Media programme 2021-2026 - Capacity Building and Professionalisation of the Media”, led by Fojo Media Institute (Fojo), in partnership with the Swedish Media Development Office (SR MDO) and others, has therefore made it a priority to provide the media sector with data and insights on media consumption patterns including all media categories and from all parts of the country. A programme funded by the Swedish International Development Cooperation Agency (Sida) and the Swiss Agency for Development and Cooperation (SDC).

Two national media consumption surveys are included in the programme, and this report describes the first one, the National Media Consumption Survey 2021, which is the first of its kind in Rwanda. It was prepared in 2020 and conducted in 2021, and the results will be instrumental in building capacity and professionalism in the Rwandan media sector. The media providers have now been granted the same tool as is used worldwide to get closer to audiences, analysing their needs and preferences and developing content and sales based on facts, instead of assumptions.

After the introductory chapters, describing the background and purpose of the research, the methodology of the survey will be presented, followed by a chapter about the top line results and analysis. A chapter on lessons learned and recommendations ahead, concludes the report.

2. Background to the research

Ever since Fojo and SR MDO started working with editorial development in Rwanda in 2014, the need for audience research has been expressed in different ways among media providers. The main request has been to obtain data and insights from all sectors of the country, not just Kigali and other urban areas. With the majority of Rwandans living in rural areas, it is very important for media producers to know what people´s media consumption patterns look like, but also to obtain more in-depth data on content preferences and media trust. These insights will help the media organisations develop their content to match the needs and wants of audiences, but also to attract advertisers.

The need for a national media consumption survey was also emphasized during the four media stakeholder meetings, arranged by Fojo and SR MDO in October 2020, to prepare and anchor the Rwanda Media programme within the Rwandan media sector. In the meetings, media representatives described audience research as one of the most needed areas to focus on in order to professionalise and build capacity in the Rwandan media sector.

With media being a very sensitive sector to work in, because of Rwanda´s history, the Rwanda Media Programme has been very thorough in anchoring the audience research process with the media sector from the very start. The collaboration has been close in preparing for and conducting the survey, aiming to jointly navigate in this new area of research for both media practitioners and media authorities in Rwanda. The anchoring process is more thoroughly explained in the Methodology chapter 5.

3. Purpose of the research

The purpose of the National Media Consumption survey 2021 has been to map media consumption patterns and preferences among Rwandan audiences across the country, for the benefit of the Rwandan media sector. Urban audiences in Rwanda have been researched before, to some extent, especially people living in Kigali, but since they do not represent audiences in the rest of the country, it has been a request among media organisations to get a national overview of media usage in all regions. Rural and urban areas in the North, South, East and West have therefore been included in the scope of the survey.

The research will provide the Rwandan media sector with the audience data they need to understand their respective target groups. When analysed, the media houses can use the insights to adjust and develop their content to better serve the audience according to their needs and preferences. The next media consumption survey (also included in the Rwanda Media Programme) will then show if the audiences have appreciated the editorial changes or not, to then have the content development continue with new measurements and evaluations of audience preference. A science of its own that helps media companies get closer to the audiences by turning to them, showing interest, caring about their preferences and building trustful relations.

The insights are also highly interesting for the sales departments of the different media houses. When knowing exactly how people consume the content provided, the knowledge can be used to sell advertisement. In combination with the opportunities offered in content development, this could directly contribute to important strategic choices and decisions within the sector.

The whole audience research process, from deciding the scope, designing the questionnaire, conducting the fieldwork, collecting the data, analysing the results and starting to use them in implementation, also aims at building capacity in the field, so that the Rwandan media sector can on its own harbour reoccurring media consumption surveys in the future. This is vital in developing the sector, strengthening its professionalism and to be able to compete with the global media actors who measure audience habits every second of every day, 24/7.

Lastly, the National Media Consumption Survey 2021, has contributed greatly to establishing baseline data for the Rwanda Media Programme 2021-2026, so that the overall progress in media development can be measured, not least with the coming National Media Consumption Survey.

4. The Audience research process

In this chapter the total audience research process is described. It starts with the mission related to the purpose (see above) at it goes all the way to the reporting. The methodology, which is a crucial part of the audience research process, will be reported separately in chapter 5.

4.1 Setting the scope

On a general level, the scope was already set with the need and purpose of the National Media Consumption Survey. However, during the joint preparations with the Audience Research Working group, the scope became more clearly defined and detailed, and the following six areas were decided to form the framework of the questionnaire:

1. Radio Listenership

- Whether the respondents have access to radio
- Which radio stations they are aware of
- Which ones they listen to
- Frequency of listenership
- Ranking of radio stations

2. TV Viewership

- Whether the respondents have access to TV
- Which TV channels they are aware of
- Which ones they watch
- Frequency of viewership
- Ranking of TV channels

3. Newspaper Readership

- Whether the respondents have access to newspapers
- Which newspaper brands they are aware of
- Which ones they read
- Frequency of readership
- Ranking of newspaper brands

4. Internet Usage

- Whether the respondents have access to internet
- How they access internet
- Social media & applications accessed
- Frequency of usage

5. Media Trust

- Which media the respondents trust
- How much they trust the different media brands

6. Demographics

- Household size

- Age
- Gender
- Education level
- Household income

4.2 The anchoring process in the media sector

In October 2020 the official Audience research anchoring process took off, when Fojo and SR MDO invited media companies, authorities, networks and donors to four stakeholder meetings at Hotel Lemigo in Kigali. Because of the pandemic, the representatives from Sweden could only participate via Zoom, while the Rwandan participants attended IRL. The webinars were very energetic and interactive, much thanks to the moderator on site, Mr. Alex Buyinza, Project coordinator at Fojo. The discussions were lively and the enthusiasm significant regarding the plans and preparations to conduct a National Media Consumption Survey in Rwanda.The scope of the survey was presented, and a lot of valuable input and advice was given by the participants. Not only about the areas in need of research and the importance of covering all regions of the country, but also about the need to obtain visas and permits from different authorities, in order to conduct research in Rwanda.

During the webinars, Fojo and SR MDO suggested that an Audience Research Working group should be appointed by the media sector, to assist the research team in capturing the needs of the Rwandan media and audiences, but also to be mindful of the overall context.

The proposal was well received, and a group of media representatives were shortly appointed, consisting of one member each from radio, TV, newspapers, online/social media, community radio and Public Service media. The Working group has since played an important role in different parts of the process, not least when the questionnaire was constructed, where the members of the group contributed largely and with very valuable input. Without their in-depth knowledge, the unique questionnaire would have not been of the same quality as it is.

4.3 Choice of fieldwork method

Depending on the scope and various practical preconditions, a well-founded decision must always be made about which method to use for the fieldwork. Considering the number of questions in this particular survey, the complexity of the scope and the low access to internet in rural areas in Rwanda, it was obvious to everyone involved to choose face-to-face interviews as the method for data collection. This was decided despite the difficulties related to covid-19 and the many restrictions that were in place at the time.

4.4 The procurement process

I order to find the most appropriate research company for the fieldwork, eight companies were invited to submit their proposals in a procurement process conducted by Fojo, in accordance with the Swedish Public Procurement Act, LOU, based on European Union directives.

Six of them delivered offers, out of which three were global institutes; GeoPoll, Ipsos and Nielsen, and three were Rwandan companies; NM Research Training Center, Research Hub and the winner, Ethical Research Solutions (ERS).

The procurement process was open and the choice of the winning bid was based on the total score that each institute/company received according to the set criteria. Ethical

Research Solutions (ERS) received the highest score, even though their experience in media research was not the most extensive. However, based on the collective contextual knowledge in the Audience research Working group, and the long experience in the field in the research team, other qualities were considered to be more important.

4.5 The reporting of results

The reporting of results of the National Media Consumption survey, has been divided into different steps, depending on content and recipient, and to some extent the final steps of reporting could be considered as the first steps of implementation.

Step one of the reporting started when a number of preview-presentations were given to Fojo, ERS and the Audience research Working group, prior to the official presentations. After that, some adjustments and reprioritisations were made before the major presentation was conducted for all media stakeholders and funders, in conjunction with the official launch of the Rwanda Media Programme at Hotel Lemigo in Kigali, October 14, 2021. That was step two of the reporting.

The day after, the reporting moved on to step three, when custom-made workshops were conducted with representatives from the different media categories.

	Date	**Media category**	**Number of participants**
Workshop 1	Oct 15	Radio	19
Workshop 2	Oct 18	TV	9
Workshop 3	Oct 19	Online/social media	26
Workshop 4	Oct 20	Newspapers	The workshop was postponed until further notice, but 19 participants had been invited

Step four has not yet started, but the plan is to organise tailor made workshops for media houses that are interested in developing their content production and sales, based on the results regarding their specific media category, profile, target audience etc.

This is the stage when data and results will be converted or processed into becoming useful knowledge for developing media content delivery that will fuel the media sector for further development.

In order to guarantee the statistical validity of the results, a common reporting principle in audience research has been applied. Daily reach under 0,5 % will not be reported for any media title and weekly reach under 1,0 % will not be reported. All media titles with lower reach will be added together in a category called “other radio stations”, “other TV channels” and so on.

4.6 Implementation – from results to useful insights

The audience research process sometimes stops at the reporting of results, but that is not the best way to get the most out of the data and the facts that have been reported. It is therefore always recommended to work together with key people within media companies to create insights out of this “gold mine” of results. To invest resources in terms of time is crucial for stimulating the development of content and audience satisfaction. These insights have the potential to become the fuel that the Rwandan media sector needs to become more audience oriented, and thereby be of greater service to the public.

These efforts will also be included in the Rwanda Media Programme, offering custom made support and coaching in developing content and sales based on the knowledge gained from the National Media Consumption Survey 2021, with potential to measure progress with help from the follow up survey that is included in the programme.

5. Methodology

This chapter describes the methodology chosen to meet the requirements of the National Media Consumption survey 2021. It includes the choice of fieldwork, the sampling, how the actual fieldwork was carried out, the weighting and other aspects. The reader that wants even more in-depth information is recommended to read the Technical Report compiled by ERS (see Appendix 1) where all of this is described in more detail.

5.1 Sample requirements

In order to cover all regions of Rwanda, the sample requirements were very strict. The demand was to cover South, East, West, North and Kigali. The reason being that it should be possible to analyse media consumption in each region and get a big representative sample on a national level.

Another demand was to get representative results regarding urban and rural population, as well as a representative sample related to gender and age. Finally, the sample had to cover Rwandans between 12 and 80 years of age, and the final efficient sample met all of these requirements. However, in all studies such as this, weighting had to be conducted to guarantee full representativity in relation to the public statistics of the National Institute of Statistics Rwanda, NISR.

It was proposed that the research team should work with a sample of n=2500 which was sufficient for a national study in Rwanda based on the target population. To ensure that there would be sufficient responses from each of the regions, it was suggested that a quota sampling with a sample distribution of n=500 in each of the five regions should be used. Urban/rural distribution was however split, based on the population census in each of the respective regions (Reference table 1). The sample size of 2500 was estimated to provide sufficient estimates at urban/rural, age and gender levels with a margin of error of +/-1.96% at 95 confidence level (%), which means that the data in general met very high standards. The sample size distribution at quota stratification by region and national representation by rural/urban was distributed as below:

Table 1: Sample requirements

Region	Urban	Rural	Total
Kigali	379	121	500
South	44	456	500
West	61	439	500
North	47	453	500
East	36	464	500
Total	**567**	**1933**	**2500**

In each of the regions, Primary Sampling Units (PSUs) were selected, based on sectors from the official NSRI population statistics (census data). These were selected by systematic Probability Proportion to Population Size (PPPS), allowing a minimum of 10 interviews per sector. All of this was done to make sure the sample would be representative on a national and regional level.

The second stage of selection was of households; in each selected cluster, the supervisor would identify a landmark/point (school, office, water point, electric pole or business outlet) which would mark the starting point. From this point, the team of interviewers would get their direction, determined by spinning a bottle on clear ground in clockwise direction. Using 180° spatial, the five interviewers would then move in different directions to get their first households, using a systematic method to find the households from which to select the various respondents. In the third and final stage of selection, the interviewers would select a respondent from the household who fit the criteria, randomly selected using the well-established GRID method in households, where there were more than one suitable respondent.

5.2 Samples achieved and weighting

The study overachieved on the overall sample, regions and urban/rural setting, as shown in table 2 below. An overall sample of 2741 was achieved against the targeted 2500.

Table 2: Sample achieved

		Gender		Age Group					Setting	
	Total	Female	Male	12-17 years	18-24 years	25-34 years	35-44 years	45+ years	Rural	Urban
Total	**2741**	**1689**	**1052**	**170**	**489**	**746**	**581**	**755**	**2146**	**595**
Eastern	528	336	192	34	94	133	128	139	485	43
Kigali City	517	289	228	28	117	178	83	111	148	369
Northern	579	386	193	38	98	145	117	181	488	91
Southern	569	332	237	50	81	136	128	174	529	40
Western	548	346	202	20	99	154	125	150	496	52

All the regional samples and urban/rural samples were achieved with small disparities based on the expected proportions. However, as the overall sample by regions was done by quotas, there was need to weight this data such that the overall sample by regions would reflect the population distribution of the regions. Gender and age demographics also observed small proportional disparities based on the national population statistics. It was thus agreed by the project team that weighting of data would also be done by gender and age to reflect the national distribution. The sample were then weighted and analysed. The weighting was computed based on the characteristics and known population parameters of the Rwanda 2012 Population and Housing census.

5.3 Training of fieldwork personnel

Training was conducted between May 24 and 28, 2021. There were 44 people trained in total: 31 enumerators, 5 supervisors and a team of 7 field managers and quality controllers. Everyone that would be involved in the study attended the training.

The team was trained on the background and objective of the study, what they were expected to achieve during data collection and how they were to achieve these expectations. The training sessions were facilitated through materials that had been prepared by the project team at ERS, and approved by the Rwanda Media Programme, NISR and RNEC. The material consisted of the Questionnaire, the training manuals, children and adult information forms, adult consent forms, sampling forms and contact sheets.

The training was conducted in Kigali and all sessions were facilitated in Kinyarwanda.

5.4 Pilot interviews

To test the questionnaire and prepare the interviewers, about 200 pilot interviews were conducted in Kigali on May 29 and 30, following the training. The pilot was structured to follow the actual data collection concerning respondent selection and questionnaire moderation. This served to assist the enumerators to familiarize themselves with the data collection protocols, the data collection instrument and actual expected field experience. Every single question was checked, as was the "flow" and the length in the interviews. A total of 110 interviews were conducted during the pilot exercise and a report was generated based on the findings. After the pilot, some minor corrections were made to improve the data collection.

5.5 The actual data collection

The fieldwork took place during June and July 2021. The covid-19 restrictions were challenging for the interviewers, since they had to keep distance, use face masks, obey travelling restrictions and lock downs. Considering this, the interviewers and ERS did a very professional job and showed great determination to conduct the fieldwork with the highest possible quality under very difficult circumstances.

In order to protect the privacy of the respondents, two measures were made. Firstly, no interviews were conducted without first receiving consent from each individual, which were only given after each person had read the specific consent form. Secondly, every respondent was anonymized in a specific procedure making it impossible to track any answer to any respondent. These precautions must always be made during fieldwork, but when using face-to-face interviewing, anonymization is even more important.

ERS checked and followed up on interviews, checking if every interviewer fully followed the instructions not "helping" any respondent to give certain answers. If any interviewer would help or "lead" any respondent to an answer, that answer was excluded in order to avoid biases.

During the fieldwork, the research team had weekly update meetings to discuss any kind of question or challenge that might occur, and ERS adjusted accordingly to fulfil the demands of the mission. Before closing the fieldwork, the total number and quality of interviews were double-checked by ERS and reported to the Rwanda Media programme.

5.6 Systematic quality control

Quality control measures were undertaken simultaneously with the data collection. For instance, 11 questions were placed under so called silent recording. This means that when the interviewer reaches a particular question in the script, the recording is triggered to register both the question and the response given by the respondent.

The quality team would then compare the written response with the recorded answer and check for consistency. There was a ratio of 5 enumerators to each supervisor, which allowed the supervisor to shadow a small group during the actual data collection.

Data was also checked as the interviews were submitted to ensure there were no inconsistencies. There was also GPS capture in areas that had viable internet. This allowed the quality team to verify the submitted interviews against the allocated geographies.

Table 3: Summary of quality control measures

No. of interviews checked through backchecks	130
No. of interviews checked through supervisor accompaniments	306
No. of interviews checked through silent recordings	1381
No. of interviews checked through data checks	109
GPS capture	2741

6. Top Line results and analysis

In this chapter, the main results of the National Media Consumption Survey is presented, commented and briefly analysed. For more detailed information, please see Appendices 2-6.

6.1 Media access

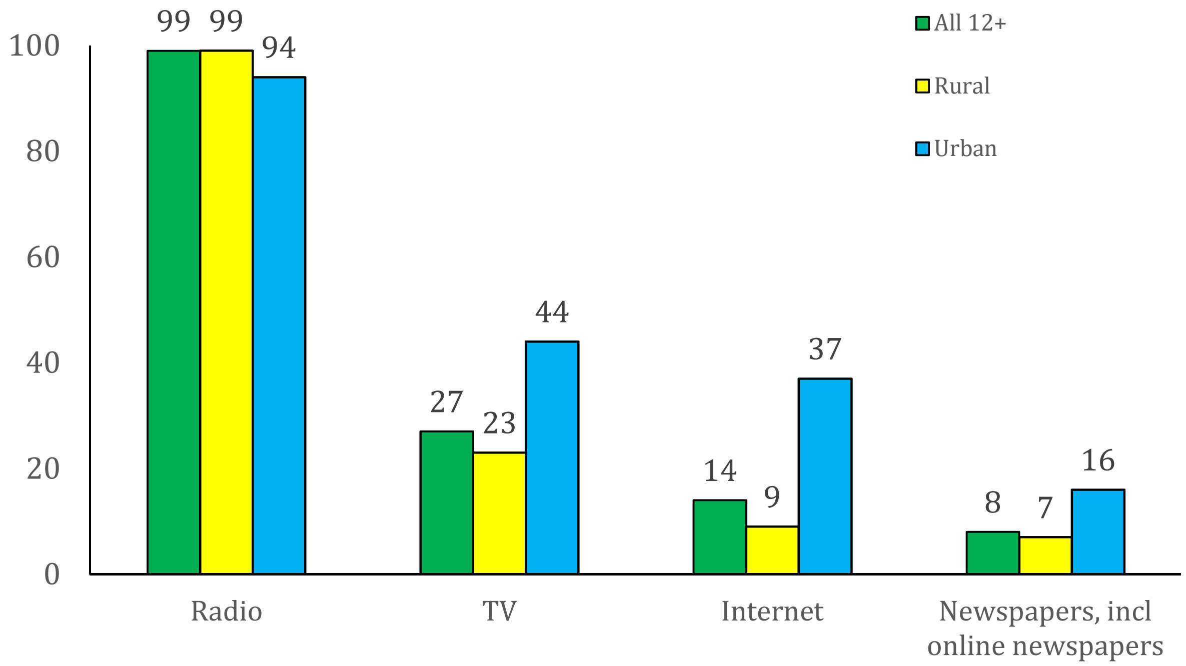
The level of access to different media and media content is of course fundamental for frequent media consumption. Therefore, this analysis starts with analysing Rwandan's access to different media.

Access to radio, meaning having a least one radio receiver available for listening, is very high in all parts of the population and in all regions of the country. This means that almost everyone in Rwanda can listen to radio if they want, and also anywhere they want.

With access to TV it is much different. In all, 27 percent of the population have access to TV and the possibility to watch it frequently. Some people have access only in public places, and it is as common to have access to your neighbours' TV, as it is having your own TV set at home. The differences in access among different parts of the population is huge. Among the urban population access is much higher, and Kigali more than 50 percent have access to TV, while the number is only 11 percent in the Western parts of Rwanda.

ACCESS TO DIFFERENT MEDIA

People 12-80 years who have access, in rural/urban areas (in percent)

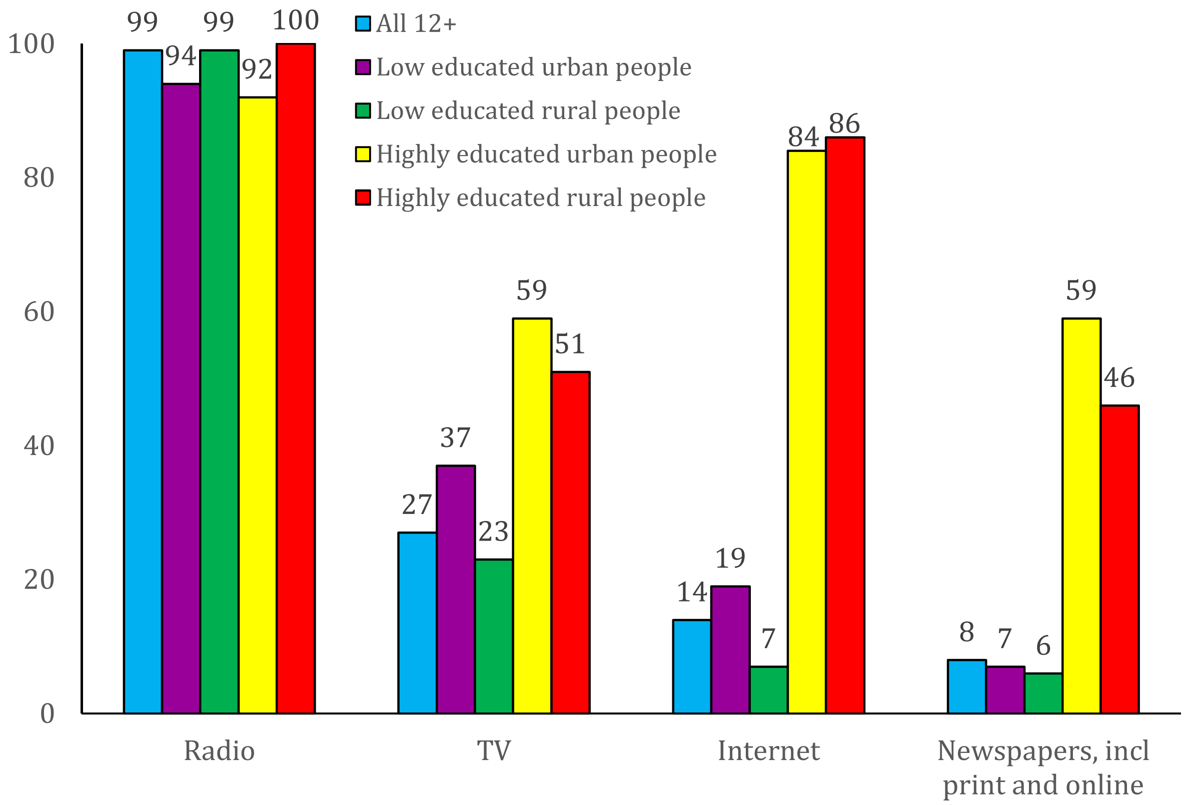


As shown above, TV is a media mainly for the urban population of Rwanda and newspapers, both print and online, is a media for highly educated people in the urban areas. It is only 8 percent of all Rwandans, 12-80 years of age, that have access to newspapers in print or online, while 59 percent of the highly educated people living in urban areas have access to newspapers in print or online.

Access to internet is also very unequally distributed among the population, with 14 percent of the total population having access to internet. Using a smartphone is, by far, the most common way to use internet, if you have access. When taking a closer look at different segments of the population, it is very clear that access to internet is much higher among highly educated people, than in other parts of the population. In these segments, 84 and 86 percent have access, while only 2 percent have access to internet among older rural people. That is a substantial gap between different segments of the population that every media company must consider in their strategies.

ACCESS TO DIFFERENT MEDIA

In some other segments of the population (in percent)



To sum up, radio is accessible to almost everyone, almost everywhere, while other media can only be accessed by some people in Rwanda. The possibilities to watch TV is high in urban areas, and especially in Kigali. Access to internet and access to printed and online newspapers is very unequally divided. People with higher education living in urban areas have possibilities to consume content online and printed newspapers, while that possibility is very limited among for example older people in rural areas. These huge differences in media access, need to be kept in mind when moving in to the coming chapters that will focus on actual consumption of media content. All data referred to above can be found in the presentations in Appendices 2-6.

6.2 Radio listening and preferences

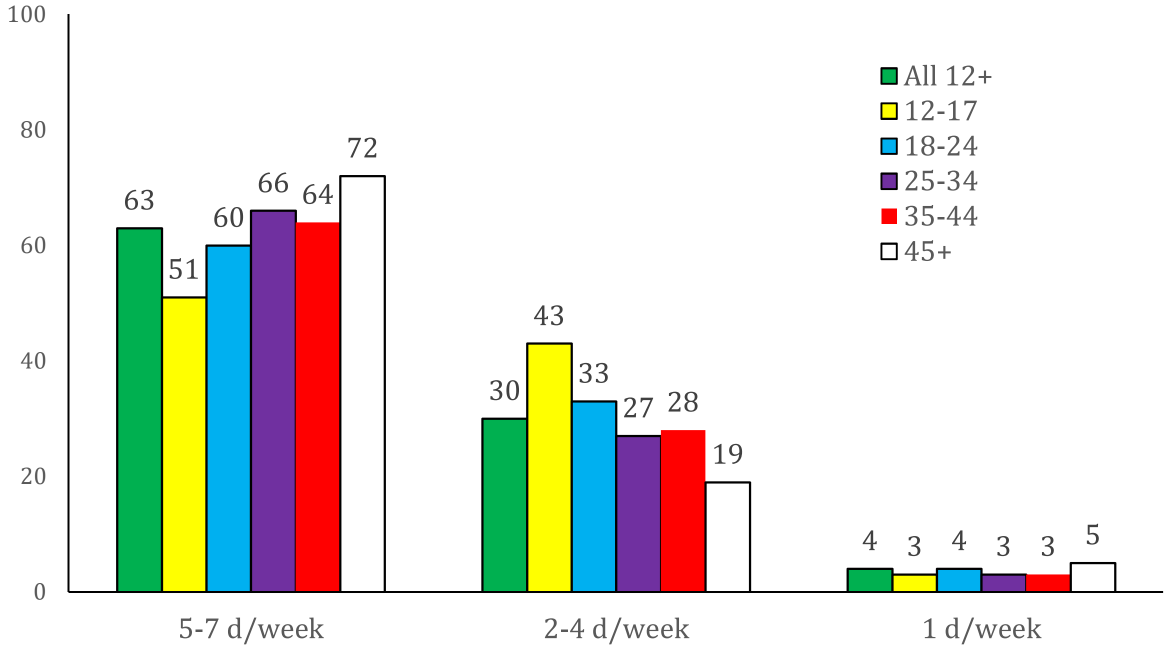
High access to radio does not necessarily mean that radio listening is high in all parts of the population, but in Rwanda that is the case. As much as 63 percent of the population (12-80 years of age) listen to radio daily (5-7 days a week), and another 34 percent listen at least one day a week. In other words, more or less everyone (97 percent) is listening to radio at least one day a week. That is a very high level, also compared to other African countries and it is much higher than in Europe, North America and Asia.

Men in Rwanda listen a bit more often than women do, but the difference is small. People living in urban areas tend to listen more often that rural people, but radio listening is high in all parts of Rwanda. Radio listening is lower among teenagers (12-17 years of age) than in other age groups and the listening is very high among the oldest people.

When focusing on the listening throughout the day, people also listen “long time”. The highest peak of listening is 7-9 pm. The second peak is in the morning 6-7 am and there is also a smaller “lunch peak” where we see increased listening. These are the weekday patterns, but during weekends there the pattern is similar. However, generally the weekend listening is often a little higher than during weekdays. This means that radio is the “winner” in the Rwandan media landscape, having the biggest audience also during TV peak hours. That is unusual from a global perspective, but it is sometimes the case in other “radio countries”, with a very strong position for radio. Most of these countries are located in African or South America.

RADIO LISTENING HABITS

How often do people in different age groups listen to radio? (percent)



The competition between radio stations in Rwanda is massive. There are 21 radio stations reaching out to 10 percent of the population or more. Despite this competition, Radio Rwanda (the Rwanda Broadcasting Agency, RBA, transforming into a Public Service Media provider) is by far the biggest station with 64 percent daily reach. This means that almost every daily listener tunes in to Radio Rwanda every day. However, they do not only listen to Radio Rwanda. The fact is that an average listener choses to listen to about 3-4 different stations per day.

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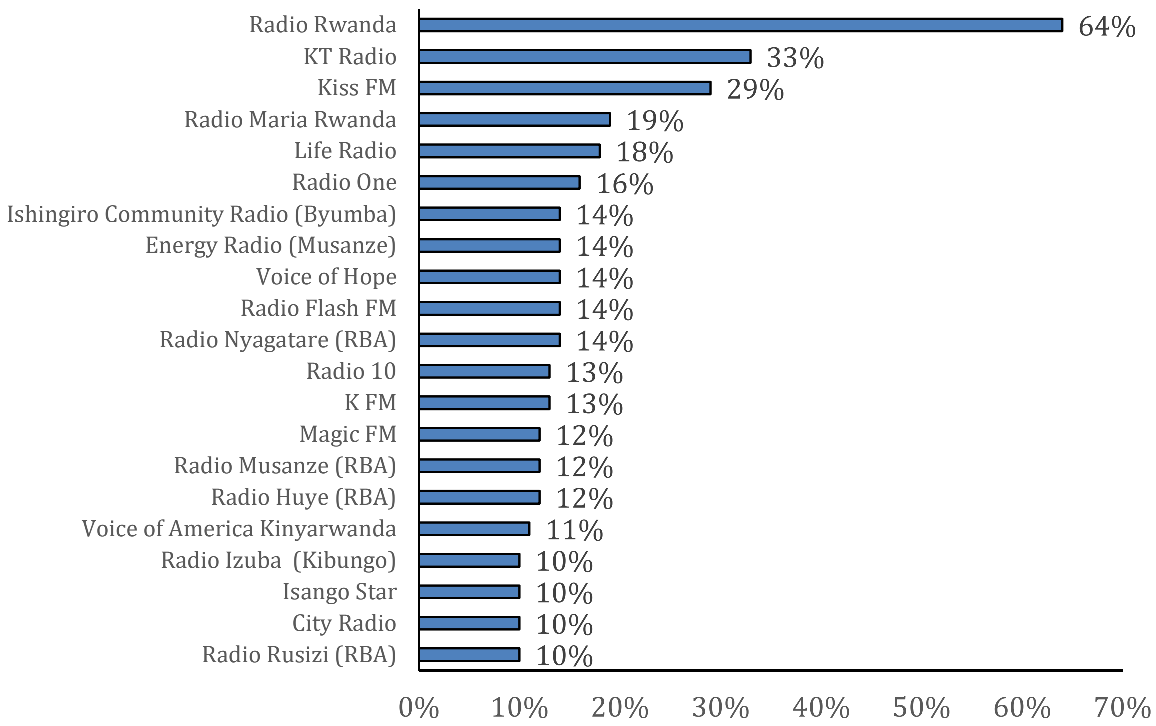
RWANDA RADIO RANKING

What stations do people (12-80 years) with access listen to daily?



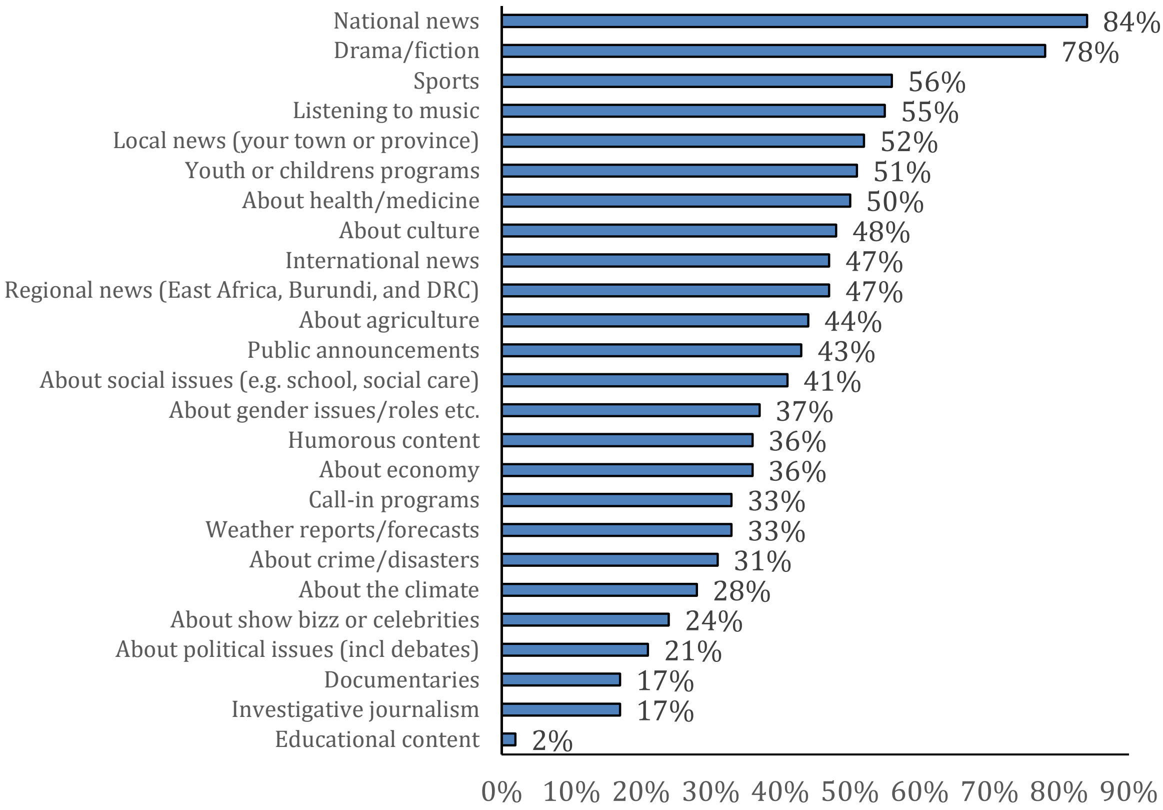
The ranking above brings up the question why people listen to specific stations and what content they prefer. In terms of usage and content radio is a "multi usage media", meaning that people listen to radio for many different reasons. National news and Radio drama are the most preferred, but also Sports and Music are very important to the listeners. Apart from these topics Local news, Youth and Children's programs as well as health/medicine is highly preferred.

Another very interesting aspect of the news is, that men have stronger news preferences than women, on a general level, while women have stronger preferences when it comes to news topics such as health/medicine, culture, social issues, agriculture and gender issues. These patterns address the question if radio news, in general, do not cover areas that women prefer as well as the topics preferred by men, such as politics and economy. The survey does not give the answer, but it is a relevant question to raise based on these content preference patterns.

Radio Rwanda is ranked number one in new, current affairs and entertainment. Furthermore, Radio Rwanda's personalities are ranked higher than the other stations. The only area where Radio Rwanda is not ranked number one is when it comes to the music they play. Number one in the music ranking is Kiss FM followed by Radio Rwanda.

RADIO CONTENT PREFERENCES

What kind of content and news do the listeners (12-80 years) like most of all?



To conclude, there is no doubt that radio is the most important media for the population of Rwanda. They listen often, spend a lot of time listening at different times of the day and they are listening to different kinds of content. Radio is not only a news media or music media in Rwanda, it is a typical “multi-purpose media” that plays a very important role in peoples’ everyday life. All data that the analysis above is based on can be found in the presentations in the Appendices 2 and 3.

6.3 TV viewing and preferences

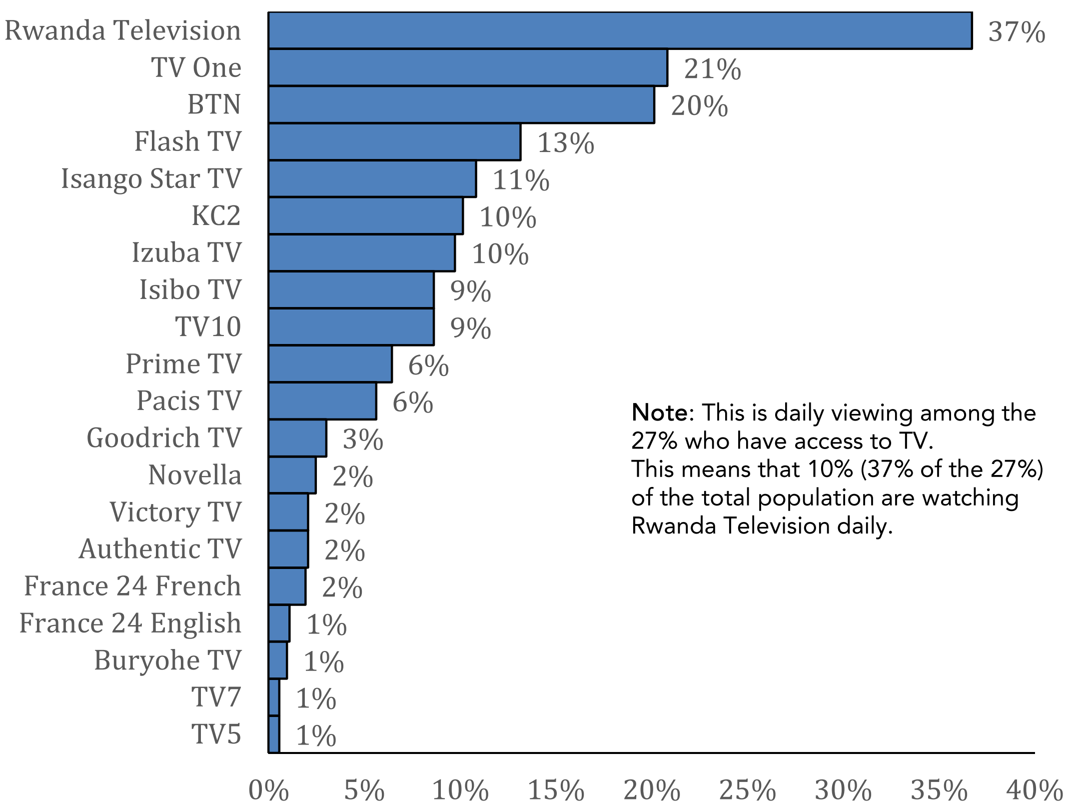
The relatively low access to TV, and the fact that only 13 percent of Rwandans have a TV set at home is limiting regular viewership. Only 10 percent of the population watch TV daily, and 20 percent are watching TV at least one day a week. Women are watching a bit less frequently than men. TV in Rwanda is an urban media with much higher viewing among the urban population and people living in Kigali.

Teenagers are watching more than adults. Another interesting, but expected pattern, is that people having access to a TV set at home tend to watch TV daily much more than people watching elsewhere. Rather few having access are watching TV less than 2 days a week. This means that key for TV to grow in Rwanda, is either to increase access to a TV-sets, especially in rural areas, or "surfing on the online wave", distributing TV content online instead of through broadcasting.

The conclusion is that using multi distribution is necessary for TV as a media. The peak hours for TV, when most people watch, is 7-9 pm during weekdays. At weekends we find more peaks a bit more spread out throughout the day. This means that TV competes with radio being the leading evening news and drama media in Rwanda, but it is difficult to challenge radio in the total population because access to TV is so very much lower than access to radio.

RWANDA TV RANKING

What channels do people (12-80 years) with access watch daily? (percent)



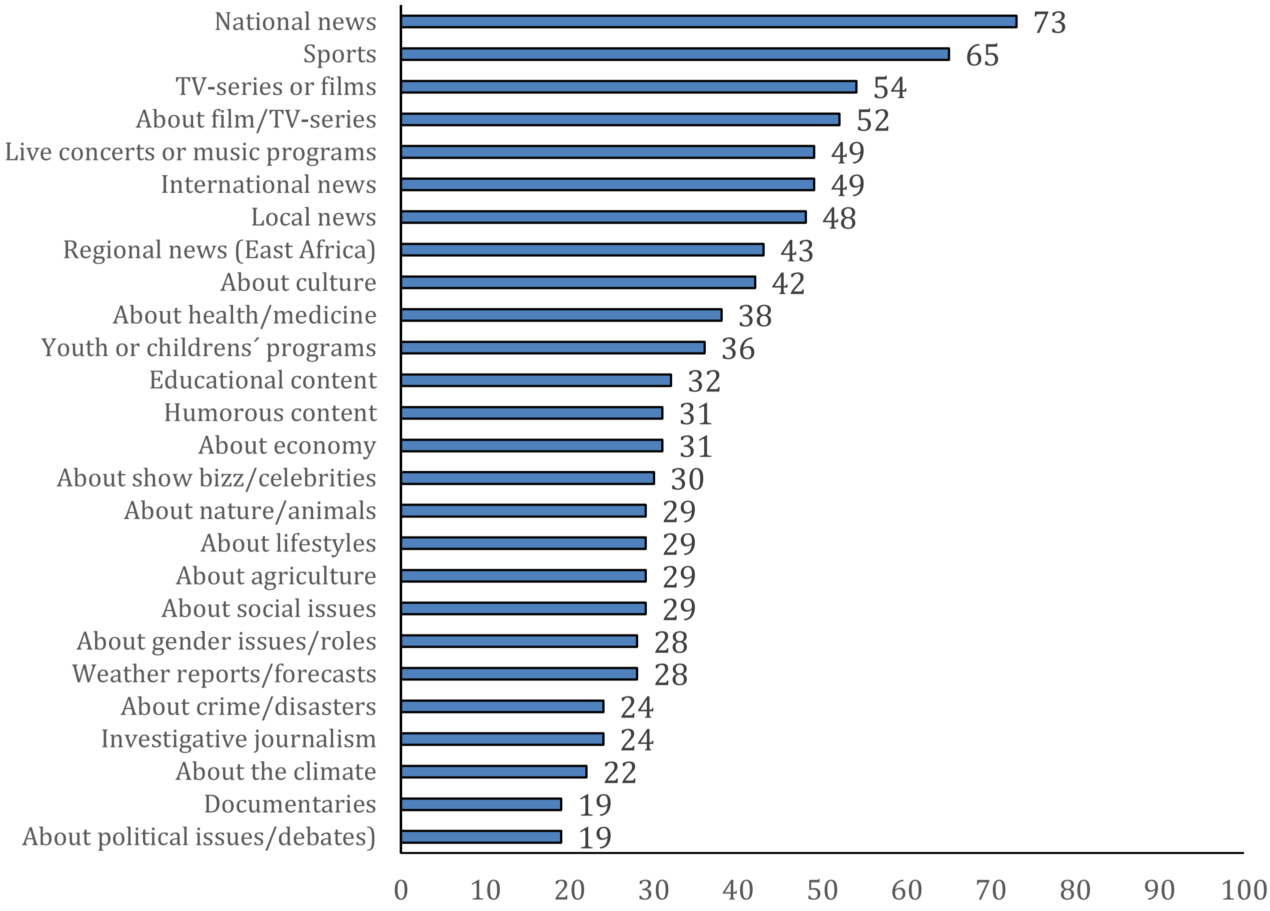
When considering the total level of viewing, it is obvious that the competition in the TV business is tough, with 20 TV channels reaching out to 1 percent of the viewers. The TV viewers are watching 2-3 TV channels daily, trying to fulfil their needs. National news is the most preferred content and sports is number two, but not far behind is TV drama and films. Then a bit further down on the list, local, international and regional news are important kinds of content. This shows two aspects of TVs' function as a media. Firstly, it is a news media, but also a strong entertainment and drama media among people having access.

Secondly, the strength of TV is also the strength of radio, which means that these two media are fulfilling similar needs and radio is in the “drivers’ seat” in Rwanda, mainly because of much higher access. Therefore, their positions are more even in Kigali and other urban areas, where a higher percentage have access to TV and have possibilities to watch TV content on a regular basis.

Furthermore, both women and men prefer national news more than other news and the differences between local, international and regional news are rather small, but when we compare preferences among women and men, related to news topics interesting patterns appear. Women’s preferences towards news topics such as culture, social issues, gender issues, health/medicine and more, are stronger than among men. It is only within politics that men have stronger preferences than women. Despite this, politics is not among the top news topics among men. These patterns address the same interesting question for TV news departments as for radio news departments: Does the news coverage reflect the needs of both men and women? The survey does not provide the answers, but it is important to address this question.

TV CONTENT PREFERENCES

What kind of content do the viewers (12-80 years) like most of all? (percent)



Rwanda Television holds a strong position at the top of the TV ranking. This is the case in the general ranking, but also on the news, current affairs and entertainment rankings. TV One and Big Television Network (BTN) are the main challengers, but there are also other TV channels receiving high marks. It seems like the competition within the field of News & Current affairs is a little bit tougher, which TV One and four more channels are getting higher marks. Another question to address is YouTube. Is it a competitor or a resource for distribution, or both? When counting YouTube as a TV channel, it ends up as number 3-4 on the general TV-ranking.

Some concluding remarks: TV as a media is struggling with much lower penetration/access than radio. That limits TV's potential to reach out to a mass audience the way radio does. The good thing for TV as a media is that people having access to TV, watch often and spend parts of their evenings watching news, drama, sports etc. That is where the big potential could be found and viewing at any platform increases when access grows. However, a key question is if the potential is really in broadcasting, or if distributing the content online is better, or a combination of both? The questions are the same in many countries around the world, not just in Rwanda. More details and in-depth information about TV can be found in the presentations in Appendix 4.

6.4 Newspaper readership and preferences

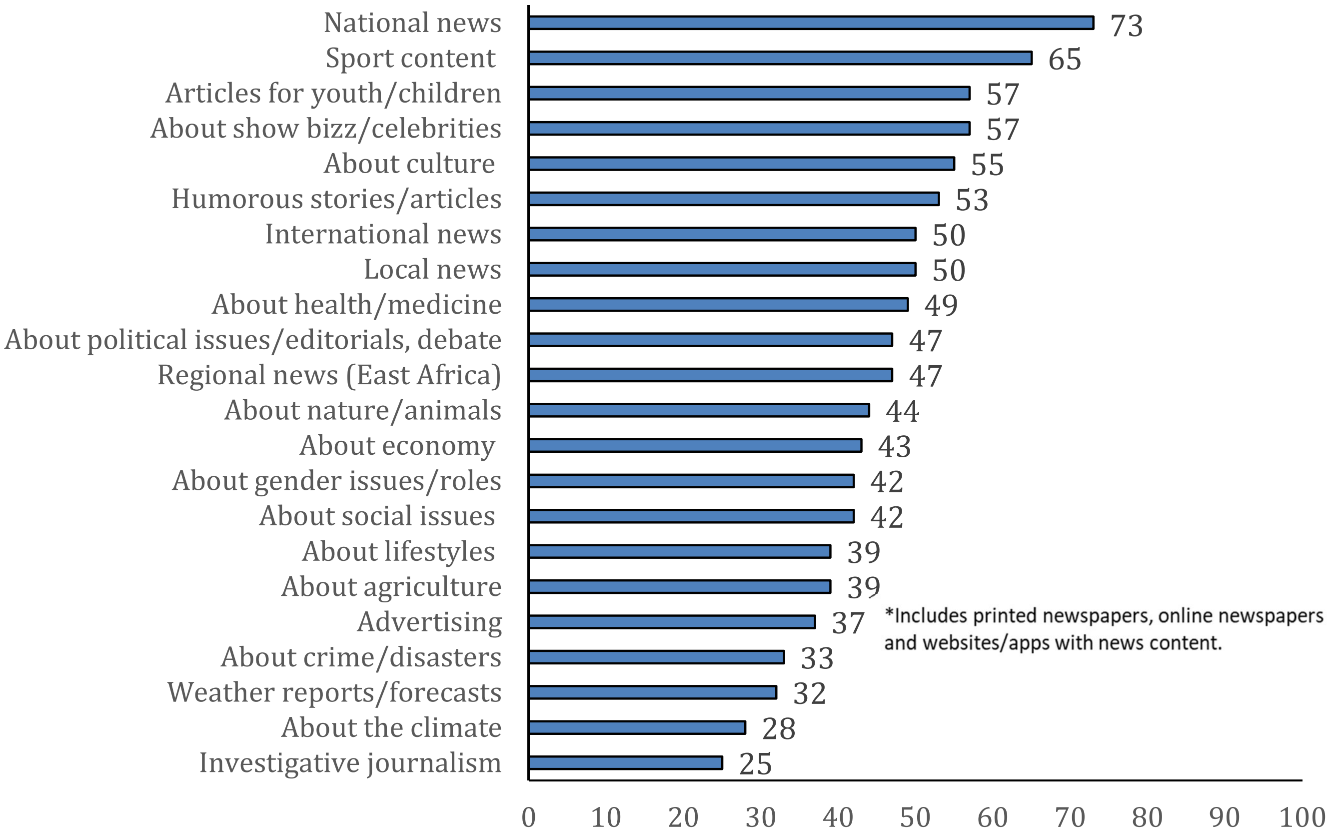
From the peoples' consumption point of view, printed and online newspapers are a "niche media" in Rwanda. It is only 8 percent who have access to either printed or online newspapers/news websites. The readership is therefore typically with so called big "social differences", with highly educated people in Kigali and other urban areas reading much more frequently than, for example, older people living in rural areas.

Men are reading newspapers a little bit more than women, and a typical reader is a highly educated young or middle-aged man living in Kigali. The average Rwandan does not read newspapers or use news websites often at all. Most of the actual readers do not read newspapers daily, but rather once or twice a week.

The competition for newspapers is a real challenge like everywhere in the world, but it is even tougher in Rwanda because of the low readership and the high level of radio listening. The transformation into online news websites is key in this process, which has accelerated during covid-19 with restrictions and look downs, preventing people from accessing newspapers. However, internet access is still an obstacle, since it is so low, although the core target group has access.

NEWSPAPER CONTENT PREFERENCES

What kind of content* do the readers (12-80 years) like most of all (percent)?



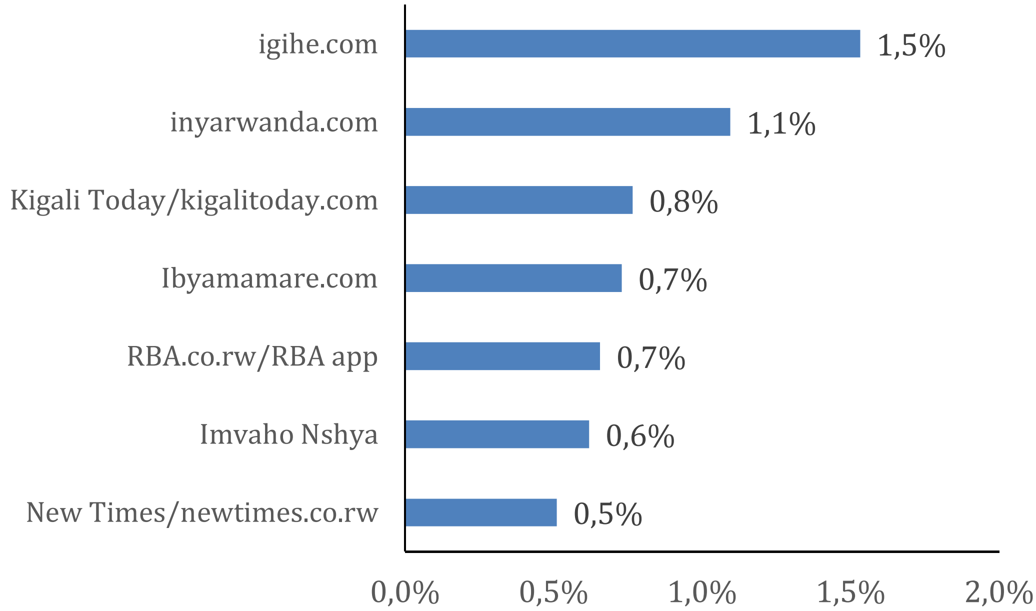
*Includes printed newspapers, online newspapers and websites/apps with news content.

When taking a closer look at newspaper content preferences, patterns that we have seen for radio and TV appear. National news and sports are at the top, as most preferred. This makes it obvious that newspapers also get competition from radio and TV when it comes to fulfilling needs among the people. On the other hand, there are also clear preferences towards articles for youth/children, about show biz, about culture and humorous content.

The news preferences among men are stronger than among women, but when we analyse preferences in relation to different kinds of news topics, women are more demanding. The same pattern as shown in radio and TV come out here, with culture, social issues and so on being more preferred by women, and politics and economy more preferred by men.

RWANDA NEWSPAPERS/NEWS WEBSITES RANKING

What titles do people 12-80 years read/use **daily**?



Note: To ensure the validity of the results, only websites with 0,5 percent daily reach or higher are presented above.

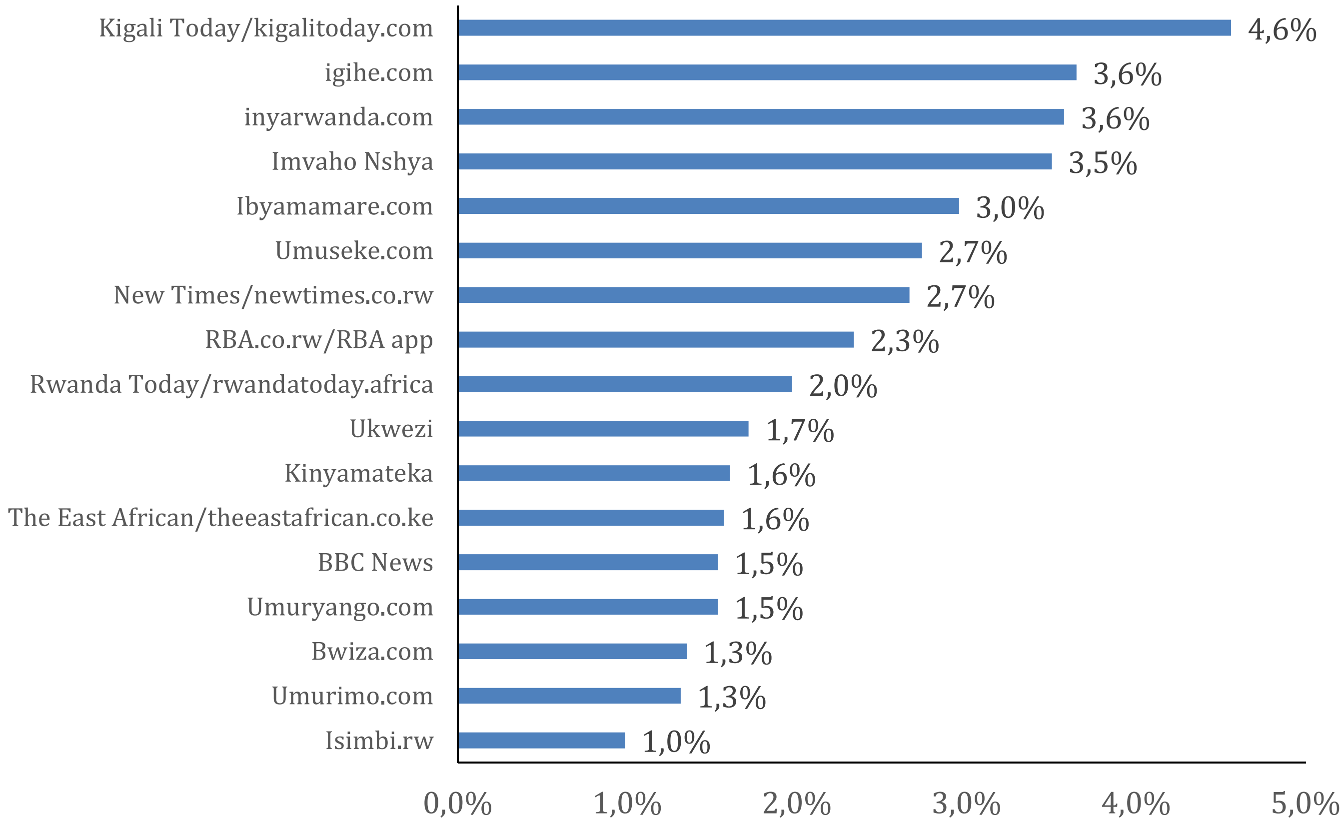
The newspapers and news websites with highest level of daily readership reach 1-1,5 percent of the population daily and 3,5-4,6 percent on a weekly basis. It is therefore relevant to rank these titles both based on daily readership and weekly readership.

On the daily ranking the news website Igihe.com is found at the top, followed by Inyarwanda.com, while Kigali Today gets the highest ranking when it is based on weekly readership, followed by Igihe.com. This means that Kigali Today, also having a printed version, is more of a media for news consumption 1-4 days a week, while Igihe.com is a website used for more frequent news consumption, competing more with radio and, among some people, with TV news.

Furthermore, when looking at these graphs it becomes clear that more news websites and printed newspapers are part of a weekly reading habit rather than a daily habit. There are 9 titles that 2 percent or more people use/read weekly, while there are only 2 titles having a daily reach above 1 percent.

RWANDA NEWSPAPERS/NEWS WEBSITES RANKING

What titles do people 12-80 years read/use **weekly?**



Note: To ensure the validity of the results, only websites with 1,0 percent weekly reach or higher are presented above.

The conclusion is that everyone must focus on challenges and the possibilities for the newspaper sector. Considering the transformation to online consumption in general and the increase in media consumption in particular, there are no signs that printed newspapers will strengthen their position among readers. However, there are possibilities to “keep” the readers they have and simultaneously increase the online readership. Using print for in-depth reading and online updates is one road forward. Another very important area, especially for young Rwandans, is video news clips and audio news clips. Some people even say that they would be prepared to pay for news clips online. If they in the end would pay is uncertain, but they say that they would. To navigate in this field, a more in-depth analysis is needed, but anyone who wants to go a bit further in to the data, can look at the presentations in Appendices 2 and 6.

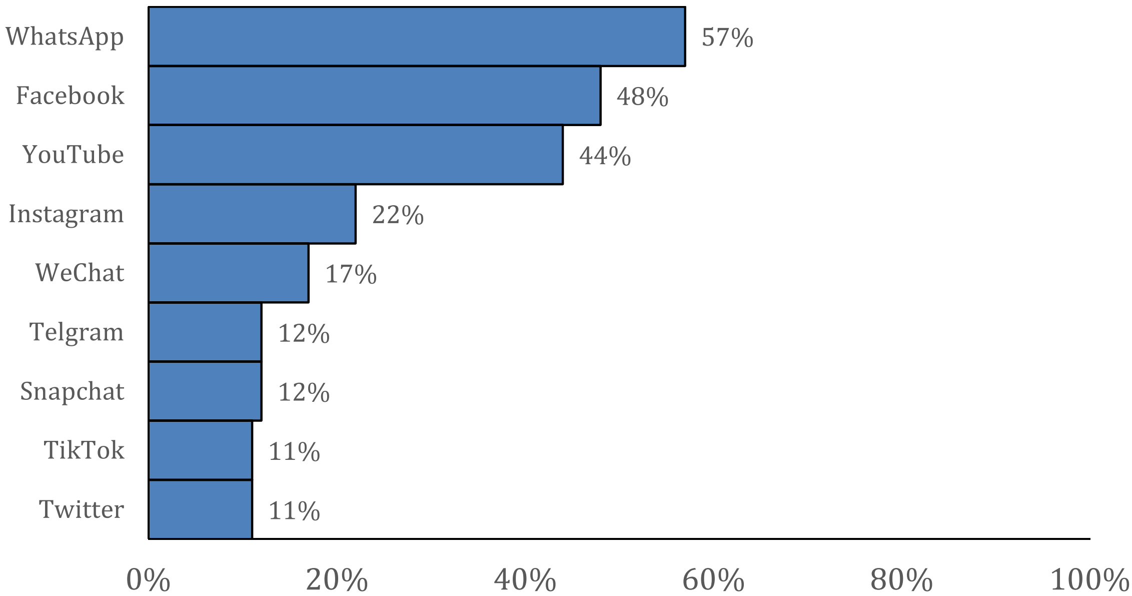
6.5 Online/Social Media usage and preferences

Online and social media usage is growing through increased access, but today only 14 percent of the population in Rwanda, 12-80 years old, have access to internet. However, in some specific segments, the internet access is above 80 percent. Mainly people with higher education and some of the younger population consume social media and other content online.

A typical user is a young or middle-aged adult with higher education living in Kigali or another city. A typical non-user is an older person with low or no formal education living in rural areas. Among people using online content and social media, the frequency of usage is very high. Most of them use online/social media every day and in some cases throughout the day. Their habits are very much like young people in the rest of the world, where they live their lives online and with social media. It is a part of their lifestyle.

RWANDA SOCIAL MEDIA RANKING

What social media do people (12-80 years) with internet use daily?



When analysing the biggest social media titles among the Rwandan population, the similarities with patterns in other African countries and patterns all over the world are obvious. WhatsApp being the most used social media is something of "an African phenomenon", while Facebook and YouTube are the leading platforms globally.

Our final reflection relates to Instagram and TikTok having a weaker position in Rwanda than in other countries. There are two very important reasons for this. Firstly, they are platforms primarily for younger users and some of the young Rwandans do not have access to internet and therefore do not use these social media platforms. Secondly, the migration from Facebook to "younger platforms" like TikTok, Instagram and Snapchat have not taken off fully in Rwanda yet.

Some interesting "gender patterns" can be found on the different platforms. WhatsApp and YouTube are much more used by women, while the differences are not as large on

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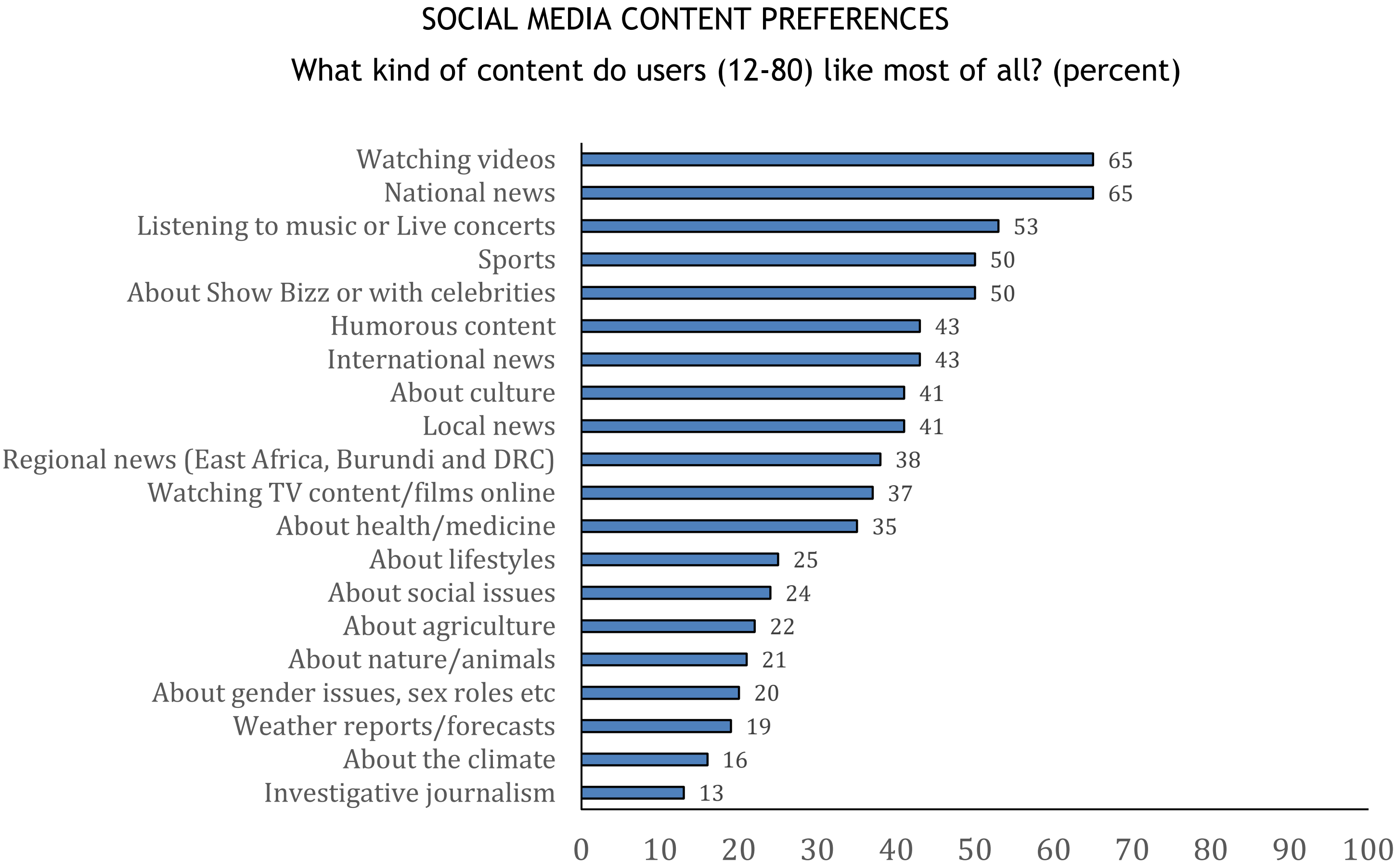
Facebook, where the usage among women and men is more similar. While women tend to use social media more, men are using news websites a bit more than women are. However, both women and men in Rwanda consume news in all different kinds of media.



The preferences online and in social media are very broad in Rwanda, just like everywhere in the world, but there are two types of preferences that stand out. The first is that news, and more specifically national news, are considered very important. The second preference that differs is that watching videos is very much more preferred among Rwandans than in most countries, and the preference to follow influencers or gossip is very low. This clearly shows the potential for TV news, or video content, on social media.

There are three major conclusions based on the average Rwandan´s usage patterns. Firstly, online and social media usage is still rather limited compared to radio listening and even compared to TV viewing, because of the low internet access. Secondly, it is not only the younger generation´s activity, but rather something more educated urban people do. Thirdly, social media has a huge potential as a way to distribute news and other relevant content to people. It is all about how media companies take advantage of the possibility to reach out to different target groups.

More info about online/social media usage can be found in the presentations in Appendices 2 and 5.

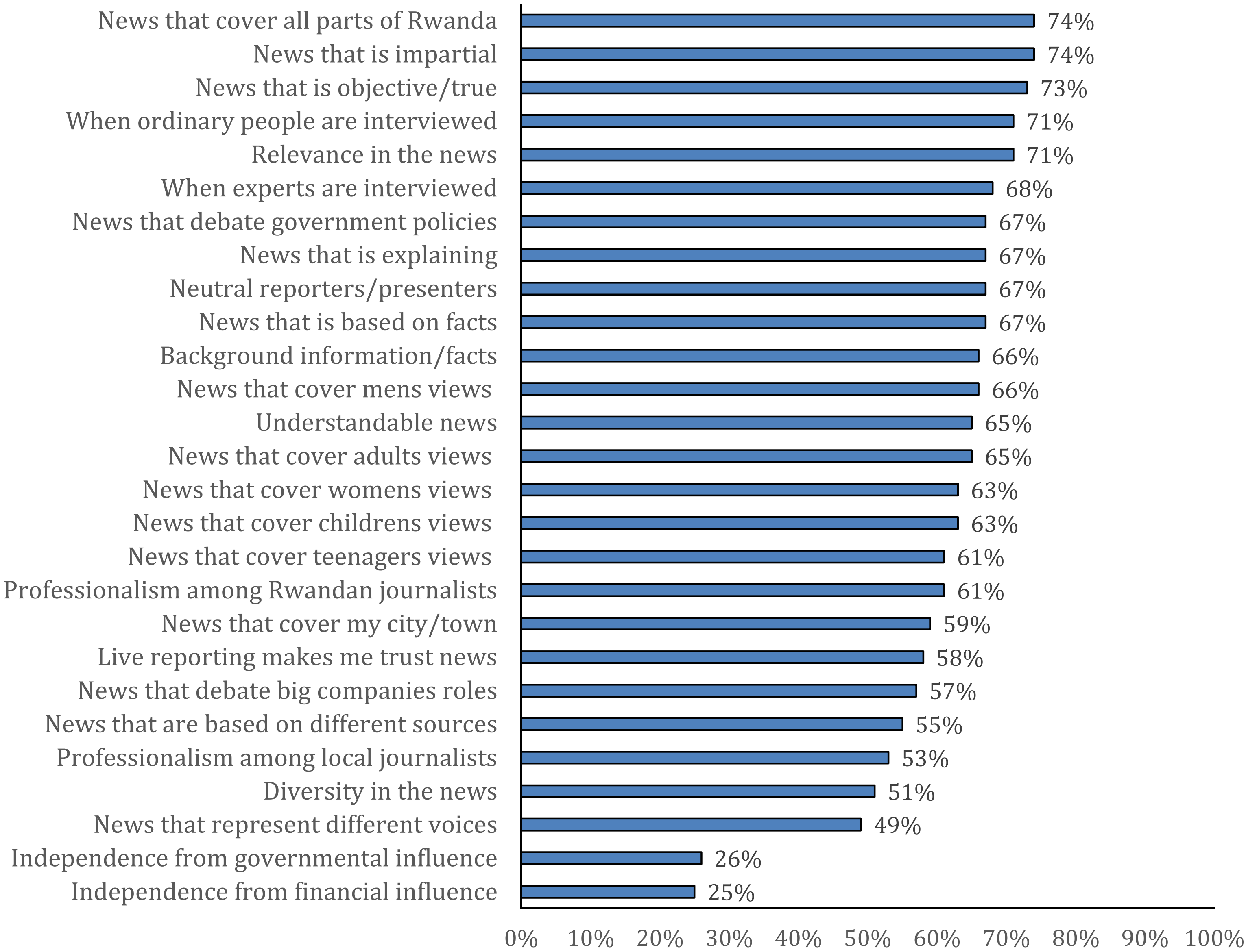
6.6 Media Trust

Trust in the media is very important for both the media consumers and the media providers. In Rwanda it could be considered even more important since news is the most important content for the audience. They are also very demanding, having high and broad expectations on the news. They want the news to cover the whole country, be impartial and relevant, but it should also capture different perspectives. Furthermore, they expect the news to be fact-based, explanatory and understandable in order for them to trust it.

The importance of independence from Government and financial influence are aspects that differ between Rwandan views and the views of people in other countries. Rwandans do not consider that kind of independence at all as important as people in many other countries.

MEDIA TRUST

- What makes people trust the news?



Using these very high expectations, the listeners ranked Radio Rwanda as the most trusted radio station with 95 percent of the listeners trusting its news. Radio Rwanda is followed by Radio Maria and KT Radio. In terms of daily listening Radio Maria is not number two, but their listeners trust their news, and that is why the station is highly ranked there.

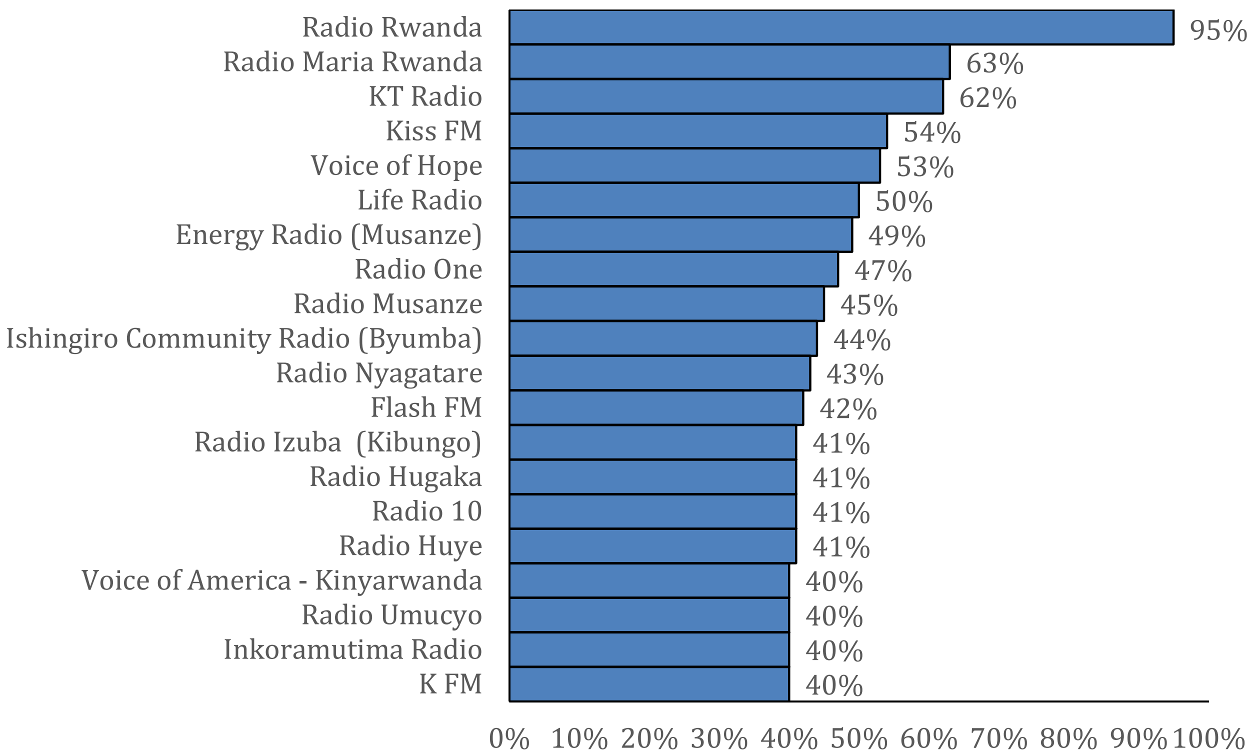
RBA is also on top of the trust ranking for TV channels. As much as 93 percent of the viewers trust Rwanda Televisions' news. TV One and BTN viewers also trust their news to a large extent.

The trust ranking for newspapers and news websites differ a bit from the radio and TV trust rankings. Firstly, RBA is not on top of the ranking. Instead, at the top Igihe.com is found, a website that is not only the most trusted but also the most used website in Rwanda. RBA.co.rw holds the second position, while their position on the usage ranking is number three. Secondly, Imvaho Nshya is third on the trust ranking, but not top three on the usage ranking. Thirdly and finally, Inyanrwanda.com is the second biggest news website, but on a lower position on the trust ranking. That's very interesting considering Inyarwanda.com's focus on different kinds of news than the other websites, such as entertainment, sports and culture.

TOP 20 TRUSTED RADIO STATIONS

How much do the listeners trust the following radio stations?

(percent that trust = 8-10 on a scale from 1 to 10)



To conclude, news consumers in Rwanda are quite demanding, telling the media companies that they must deliver "credible news" to get peoples' trust. However, they are also rewarding, meaning that if the media companies deliver news that meet their requests, they receive the people's trust. For more information about trust, see Appendix 2.

7. Lessons learned and recommendations

7.1 Research welcomed, knowledge needed

The assessments made by the research team prior to the National Media Consumption Survey, proved to be consistent with how the results have been received by the media sector in Rwanda. The need for this kind of research has been massive, and the interest in the results significant. The joy among media managers and staff to be able to access this kind of long awaited, detailed data about the media audience in Rwanda, has been overwhelming. “It´s a gold mine”, is a reoccurring expression among media representatives, but also by media authorities.

At the same time, it has become clear that the level of knowledge and understanding in the field of Audience Research is very limited in Rwanda. Some media representatives are aware of what the results can accomplish, and occasionally ask for the right parameters, but the knowledge is basic as well as the analysis. This is however to be expected. The media market in Rwanda is young and immature, and there has not been time, resources or perhaps incitement, to build capacity in the area of Audience Research. In the meantime, media houses have conducted their own investigations, although not based on scientific principles, to learn more about their audiences, for instance discussing content, counting reactions via messages, likes on social media and then drawing conclusions from that. This can serve as complementary information, but observations and assumptions can never replace scientific research.

Conclusion: The challenge for the Rwandan media sector is to acknowledge the need for fact-based knowledge about audiences, drawn from scientific research according to global standards and established experience, and respect the results. That way misconceptions might be avoided, such as the one about internet access in Rwanda being much higher than 14%, just because the people making such assumptions have access to smartphones and internet themselves, and think that everyone else does as well.

The report indicates that there is need for substantial capacity building in scientific media audience research, and how the results can be used to develop the media sector, both in content provision and sales. Several media houses have already requested support to analyse results and discuss measures to be taken to meet the needs of their respective audiences.

There is a momentum to handle these expectations, when the results are fresh, and make a plan for how the media sector could receive continuous support in understanding this field of research and the many opportunities it offers. Not least when the second National Media Consumption survey will be conducted.

7.2 Uexpected results

When the result of the National Media Consumption survey was presented and discussed, most especially during the custom-made workshops with representatives from the different media houses, many lessons were learned from the reactions and contributions.

Almost everyone was already aware of the fact that radio is the biggest media in Rwanda, and that the newspaper market is very small. However, many were surprised about the low access to TV and internet among Rwandans, some even questioning the correctness of the data in the survey, since they had preconceptions about these two media being bigger than they are.

Newspaper representatives expressed disappointment about their sector being weak with a very limited readership, mostly restricted to well-educated men in Kigali. They were also not aware that newspaper readers are major news consumers of *other* media, which could actually help them find ways to develop and expand.

If they choose to focus on content that other media do *not* provide, they can mobilize and create niche content with more value for the readers they already have, and/or expand their content to other platforms, potentially reaching more people and new audiences (non-readers). For instance by producing more in-depth material, and offering video and sound, not just written material, they could attract new audiences. This is obviously an opportunity for all media, but perhaps more important for the newspaper segment of the market, in order to survive and stay relevant.

No one seemed surprised about RBA´s dominance, being number one in both the radio and TV rankings, but the following placements; number two, three and four on the rankings, were unexpected, since people just didn´t know. The fact that news is the most important content for audiences was not a surprise either, but it was unexpected to most that so many people turn to social media for news. This sparked a discussion about expanding the use of social media for news distribution, even though the strategic thinking around this seemed to be lacking.

Thus, the recommendation by the Audience Research Working group, to include survey questions about what content the social media consumers prefer, not only if, when and where they use social media, proved to be very wise.

Overall, the online and social media section of the media sector seems to be the least developed, regarding analysis of data and direction. Although people working on these platforms have continuous access to a lot of data, their analysis and reflection are made without adequate knowledge in this area of the media market.

The questions about individual bloggers in the survey hardly gave any results at all, and did not amount to any rankings, which was noted with interest.

The fact that women and men are equally interested in news arouse great interest, since it was not expected. However, their slight discrepancies in topic interest seemed to be known, which sparked interesting discussions about topic choices and development of news. Could there for instance be new ways of producing news about social issues, health and culture to attract men, and make women more interested in politics and economy by changing the way such topics are reported?

7.3 Consumption patterns and new strategies

The survey results showing consumption patterns and preferences over the day, seemed to offer brand new information to media practitioners. It attracted great interest and responded to dormant needs, according to participants in the customized workshops. As did the differences in media usage on weekdays and weekends. This was also predicted by the members of the Audience Research Working group, when the questionnaire was prepared, which was interesting and rewarding.

The above led to interesting and fruitful discussions about programming, tableaux and distribution, and raised many questions from individual media houses who wanted to know more about the consumption patterns for each of their separate deliveries. This information of course being very valuable for both content development and sales.

It was well known to most that TV has its prime time on weekday evenings and that daytime viewing is higher on weekends than weekdays, but again, each TV channel wanted to know their specific figures for their channels. Throughout the presentations and workshops, this was the pattern, and everyone mainly looked out for their own performance, which is natural. It was however interesting to note that some raised above, and were interested in discussing overall media consumption patterns to find possible strategies to develop the media content throughout the day and on different platforms.

The fact that social media usage is spread over the day was expected, but the limited level of usage was highly unexpected. This led to intense discussions about whether social media competes with radio and television or not. It was predicted though, that with the increase of smart phones (the preferred device for social media use), the competition will intensify.

7.4 Multi-media journalism needed

One thing that came up in dialogue with the media sector is the need to stop thinking in “media silos”, and instead focus on the audiences and their needs. With audiences moving across different media platforms, “unfaithfully” consuming content without minding so much the sender or mode of delivery, the traditional media categories need to be replaced by a multi-media outlook on content delivery. This requires a holistic audience strategy within each media company/organisation, to establish when and through what media the news content should be disseminated.

The need for multi-media journalism was much discussed, as well as the need for capacity building in news production on different platforms. Creating unique content for each platform requires multi-skilled journalists, which according to media representatives are rare to find in Rwanda. Should the Rwanda Media programme be able to provide capacity building in this area, it would be much welcomed.

Around the world, newsrooms have to mobilize and train their journalists in producing content on all platforms. No journalist can no longer work with only radio (audio), TV (video) or newspaper (written articles), but every news reporter has to learn all of the above to produce “native” or unique content for each platform. Every newsroom has to start doing everything, or they will not stay relevant to the audience for very long.

The need to learn more about cross promotion between different media platforms was also discussed, since this is essential to inform the audiences about where they can find the different specific and custom-made content. A science all in itself.

It became evident that there are gaps in understanding the level and character of the competition from global players, like Google, Facebook, YouTube etc. When established media use these platforms to spread their content, they are not always aware of the influence and level of revenue that these global actors get, when media companies hand over their content for free and without restrictions.

7.5 Capacity building needed

As mentioned above, the need for capacity building in Audience Research is big in Rwanda, but based on discussions with journalists and other representatives in the media sector, it seems the need might also involve other areas of research.

The will to acquire data and knowledge has been very clearly expressed, and the excitement apparent, but upon reception, the facts were also heavily questioned. It was as if the recipients felt a need to validate or approve/disapprove of the research results, although not based on fact-based insights, but merely on their own observations and/or assumptions.

Comments like the below make it clear that some media practitioners base their views about audience habits on their own outlook and not on facts:

”The access to internet cannot be 14%. It is too low. Everyone I know owns a smart phone and internet is available in almost every coffee shops and hotel”

“We don´t agree with your figures, because we have other figures when we ask our listeners”

“That audience pattern is not correct since it is not familiar to me”

It is therefore key to separate the three levels of:

1. Own experience
2. Observations about audience
3. Scientific research based on established standards

In order to build capacity in Audience research in Rwanda, this needs to be addressed. The discrepancy between research on the one hand, and observations and assumptions on the other, must be clarified. If the Rwandan media sector is to develop skills to conduct, analyse and implement Audience Research results, the sector must relate to research and scientific data in a professional way.

One way could be to use the competence in data collection, methodology and scientific analysis that is apparent in other areas of research in Rwanda, to build capacity in this area.

Appendices

1. Technical Report by ERS
2. General Presentation of Top line results 211014
3. Presentation Radio Workshop 211015
4. Presentation TV Workshop 211018
5. Presentation Online/Social Media Workshop 211019
6. Planned presentation Newspaper Workshop (postponed)