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Mass Media in Zambia
Demand-Side Measures of Access, Use and Reach

By Gayatri Murthy, InterMedia
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Based on the AudienceScapes nationally representative survey of Zambia, conducted in April and May 2010

November 2010

About InterMedia

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

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

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AudienceScapes Project

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

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

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

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

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

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

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

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

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Report Methodology

This report uses AudienceScapes data from a nationally representative survey of Zambia to focus on how people of different social groups gather, share and access information through mass media -- radio, television and newspapers.

Notably, this report assists development professionals in crafting their communications strategies through mass media conduits. **It showcases how the AudienceScapes survey data can be used by the development community to better target communications and information-sharing efforts.**

Methodology

The data presented in this report are based on a survey conducted in April and May 2010 among Zambian adults age 15 and above. Using the 2000 Zambian National Census as the sampling frame and a stratified random sampling design, a nationally representative probability sample of 2,000 respondents was selected. The estimated margin of error is +/-2.2 percent with a 95 percent confidence interval. The survey was administered through face-to-face personal interviews; the data are weighted by location (rural versus urban) and by age groups.

This report is divided into three sections:

- *Chapter 1 Mass Media Access and Use:* Common determinants of access (such as regional distribution, income, and available infrastructure); key issues in Zambians' media use habits, particularly use differences between designated "opinion leaders" and the general population.
- *Chapter 2 Barriers to Media Access and Use:* Profiles of those Zambians lacking access to various mass media; analysis of obstacles to access.
- *Chapter 3 Media Outlet Preferences in Radio and Television*: Audience and programming profiles of specific media outlets.

A Note about the income variable used in this report:

AudienceScapes analysts define income levels based on a self-assessed, qualitative measure. Respondents are asked: “Which of these answers reflect your family’s financial situation?”. The available answers are: “We don't have enough money even for food” (identified as "Tier 1" respondents in this report, n=342); “We have enough money for food, but buying clothes is difficult” (Tier 2, n=656); “We have enough money for food and clothes and can save a bit, but not enough to buy expensive goods such as a TV set or a refrigerator” (Tier 3, n=521); “We can afford to buy certain expensive goods such as a TV set or a refrigerator”, or “We can afford to buy whatever we want” (combined as Tier 4, n= 409).

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

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

Report Summary

Chapter 1: Mass Media Access and Use

- The scope of Zambia's media environment is limited by the country's modest level of economic development and the lack of infrastructure to service non-state media.
- **Radio is the most accessible and used medium**. For development professionals, radio might be the most effective mass medium to reach many target groups -- including those who are illiterate or live in difficult to access, less-developed regions.
- Provinces with higher levels of economic development tend to have higher TV access levels, while radio access is more consistent across provinces.
- Besides provincial differences, respondents' location (urban or rural) and level of income also influence access to radio and television. Respondents' gender and age do not seem to have a great influence on the level of household access.
- **Access to radio is also influenced by the availability of various wavebands in each of the provinces**. ZNBC's Radio 1 and Radio 2 are the only national stations broadcasting on shortwave and are nationally available. A wide variety of commercial, community, religious and educational stations broadcast on FM, but none are nationally accessible.
- Comparing household access with frequency of use provides evidence of shared media such as communal television viewing and multiple newspaper readership. **Measures in the survey of media use suggest that communal use outside the home is not a significant factor in Zambia.**
- Widespread access and use of television and newspapers is limited by a combination of high costs, illiteracy, and even lack of availability in remote areas.
- Income variation comes into play in use patterns for Zambian television viewership. For the poorest tiers of Zambian society, radio is the most important (and sometimes only) source of news and information, and television is inaccessible. **As income increases, weekly use for both radio and television increase. The rate of television viewership for respondents in income tier 4 is nearly double that of respondents in income tier 3.**
- **Newspapers are not a particularly widespread source of information** for any income tier and are only marginally significant sources for the wealthiest.

- **English language skills are a crucial impediment to television and newspaper use**. Most television channels and newspapers broadcast and publish primarily in English, Zambia's national language, although English is not universally understood; nearly a quarter of respondents in the AudienceScapes survey said they do not speak, read or understand English.
- "Opinion leaders" are defined within the AudienceScapes analytical framework as those to whom others turn most for information and perspectives on various issues In Zambia. Opinion leaders tend to mirror the general population's demographics in terms of distribution across regions, ages and tiers of income, though **more opinion leaders tend to be male and relatively older than the general average age.**

Chapter 2: Barriers to Media Access and Use

- Radio access has reached near-universal penetration in Zambia's population and non-listeners are a very small group. Women are more likely than men to have never listened to radio. **Unavailability of radio signals is a bigger impediment for rural respondents compared to their urban counterparts.**
- Lack of television ownership at home, high costs of television units and problems with electricity are common issues hindering viewership.
- **The inability to read in English is not the only barrier for newspaper readership. Apart from the literacy barrier, 45 percent of non-readers said that newspapers are not available in their area.**

Chapter 3: Media Outlet Preferences in Radio and Television

- Among all mass media *outlets*, most Zambians only have access to the radio stations of the state-run Zambia National Broadcasting Corporation and a few private or community radio stations operating in their province.
- **The number and range of radio stations available to people varies substantially by province**. Less-developed provinces have fewer private or community FM stations and more listeners tune in to short-wave broadcasts from the state broadcaster. A wide variety of FM stations are available in more developed provinces such as Lusaka and Copperbelt, and listenership there is dominated by FM radio.

- **Even though state-run radio stations dominate nationally, many local radio stations get high ratings at the provincial level**. If development practitioners are formulating communication and information strategies within specific provinces, then it would be important to keep some of these community media stations in mind.

- Overall, radio has yet to diversify sufficiently on a national level to offer listeners a truly broad range of choices for news and information sources.

- Even though state-run radio dominates in less developed provinces, survey questions regarding topical interests of listeners highlight potential opportunities for development organizations seeking to spread information via broadcasting conduits. Community stations might focus on crafting relevant content for their listeners to distinguish themselves from ZNBC as independent (from state control), culturally relevant and local sources of information on which their audiences can rely.

- For most Zambian television watchers, state-run ZNBC TV is the only source of news and information on television. Other non-state television stations are mostly watched only in Lusaka Province.

Chapter 1: Mass Media Access and Use

The scope of Zambia's media environment is limited by the country's modest level of economic development and the lack of infrastructure to service non-state outlets.

Radio is the most dominant and widespread medium in Zambia. But it has yet to truly diversify and offer its audience a wide range of choices for news and information. This obstacle is mainly economic -- the state run Zambian National Broadcasting Corporation (ZNBC) dominates the radio market nationally, making it harder for private stations to garner sufficient advertising revenues.

While ZNBC's stations reach throughout the nation and broadcast in several local languages, private stations have limited reach and as our survey results show, they are unable to move to a wider, national audience outside the provinces from which they broadcast. They generally only broadcast within the provinces[1] they are located in and find it difficult to expand beyond their small listener base. In order to reach a wider audience, the private commercial stations broadcast primarily music and entertainment content and limit their political and news content in. Non-commercial radio stations focused on development-related issues are run by NGOs, religious organizations or educational institutions. While they are, in principle, catering to local information needs, their reach is quite limited.

Television and newspapers do not yet have large national reach in Zambia, and it is not clear when or if they will. Lack of economic resources, poor rural road networks and lack of knowledge of English are all important barriers to access. Development organizations should be aware of the fact that many segments of the population will not be reachable through these media. In addition, for those privileged enough to have access to television and newspapers, few choices exist and once again, state media dominates.

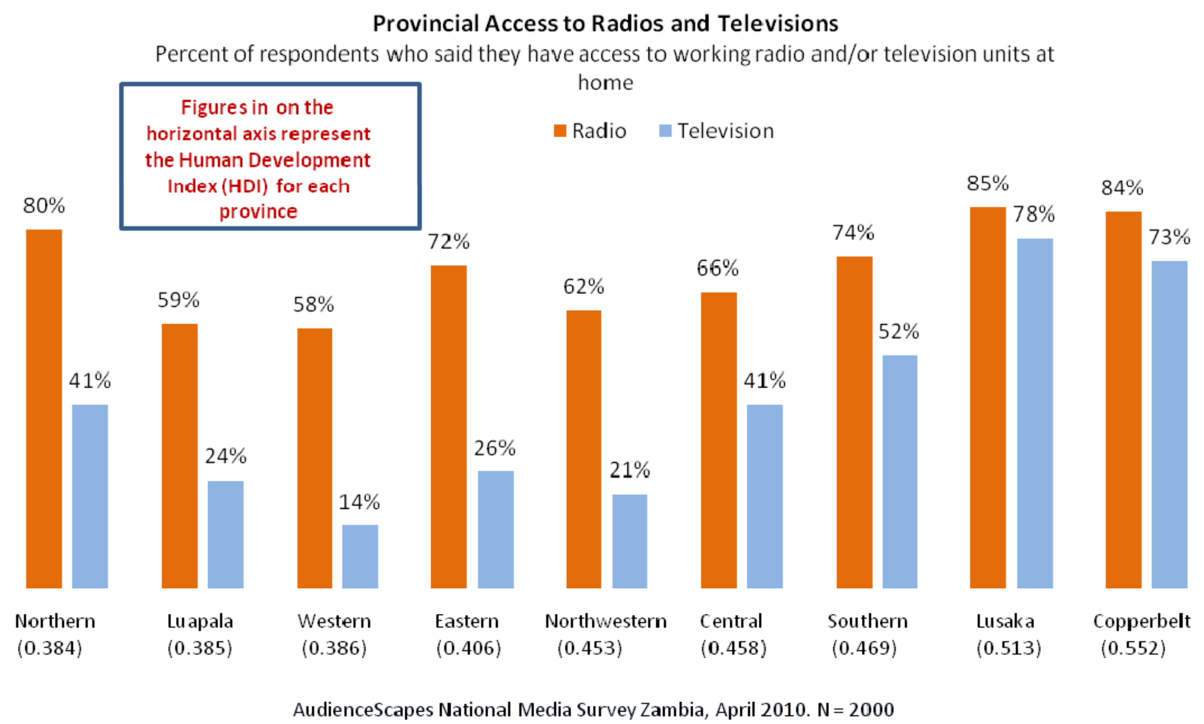
Ia: Access

Household access to radio (*defined as the percent of respondents who said they have access to a radio set in their households*) is fairly widespread, though there are notable differences among Zambia's provinces. The spreads are even more pronounced for household TV access. Figure 1.1 lists the provinces from left to right according to how they rank in the UN Human Development Index, which integrates levels of education, life expectancy and per-capita gross

[1] Zambia is divided into nine provinces, each administered by an appointed deputy minister. Each province is subdivided into several districts with a grand total of 72 districts. The provinces are: Central, Copper belt, Eastern, Luapula, Lusaka (capital region), Northern, North-Western, Southern, Western.

domestic product to measure quality of life.

Figure 1.1



As shown, provinces with higher HDIs tend to have higher TV access levels (with the notable exception of Northern Province), while radio access is more consistent across provinces.

In addition to provincial differences, respondents' location (urban or rural) and level of income also influence access to radio and television (Figure 1.2).

Figure 1.2

Zambia: Access to Radios and Televisions Percent of respondents who said they have access to working radio and/or television units at home			
		Radio	Television
Location	Urban	85%	79%
	Rural	68%	26%
Income	Tier 1 (lowest)	52%	25%
	Tier 2	69%	32%
	Tier 3	79%	43%
	Tier 4 (highest)	93%	85%
AudienceScapes National Media Survey Zambia, April 2010. N = 2000			

Television access shows strong correlation to the respondents' location (whether urban or rural) given that urban access levels are three times that of rural respondents. TV access also rises alongside income level from tier 1 (the lowest) to tier 4 (the highest).

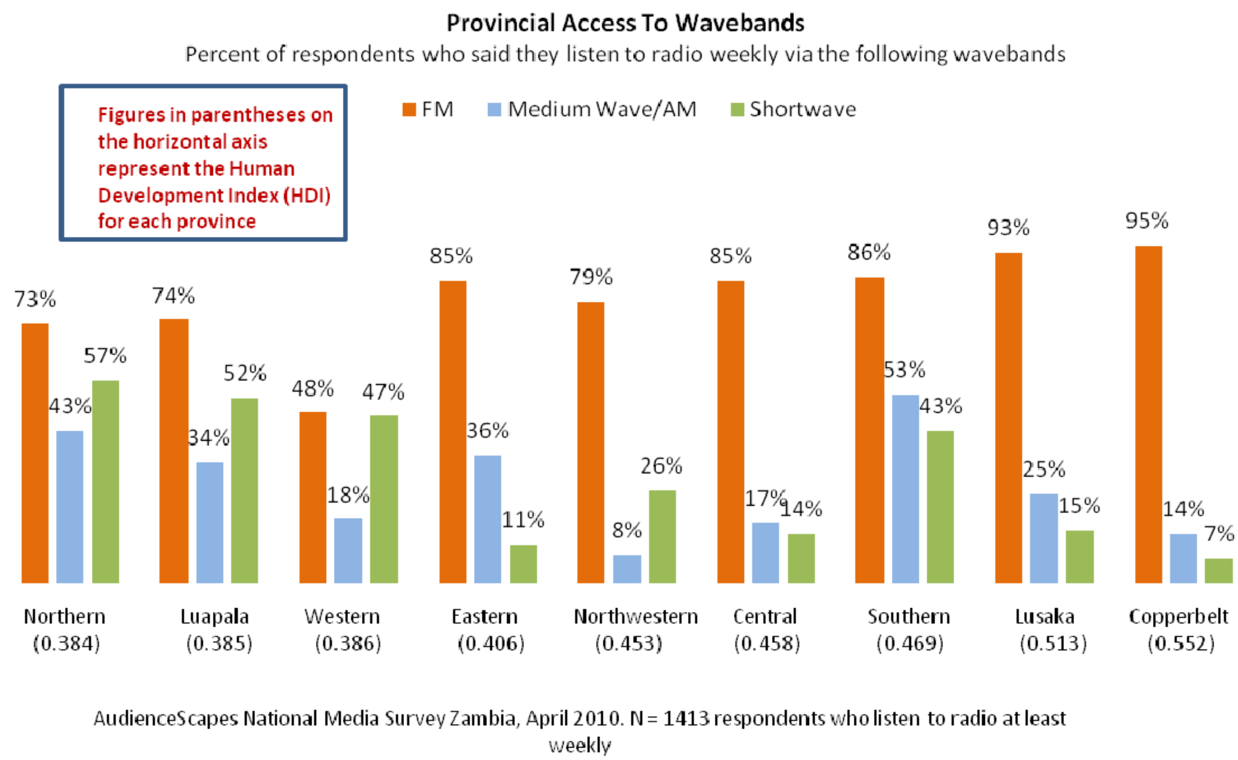
Respondents' gender and age do not seem to have a great influence on their level of household access.

Media access and level of development

Access to radio is also influenced by the availability of various wavebands in each of the provinces. ZNBC's Radio 1 and Radio 2 are the only national stations broadcasting on shortwave and are nationally available. A wide variety of commercial, community, religious and educational stations broadcast on FM, but none are nationally accessible.

Generally, provinces lower in the HDI scale have fewer private FM stations; thus, radio listeners in these provinces listen in higher proportions to SW broadcasts from the state radio. On the other hand, a wide variety of FM stations are available in more-developed provinces such as Lusaka and Copperbelt (*see more on specific radio outlets in the following section*), and listenership in these areas is dominated by FM radio, while SW and Medium Wave (MW) listenership is low (Figure 1.3).

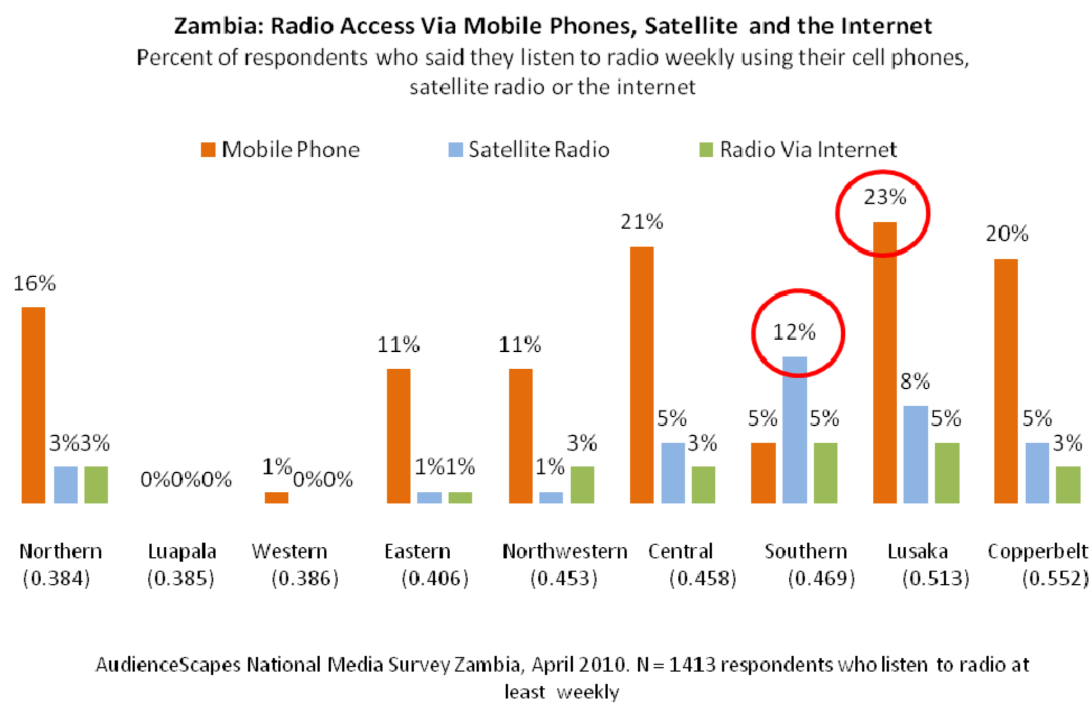
Figure 1.3



Provincial Access To Wavebands
Percent of respondents who said they listen to radio weekly via the following wavebands
Figures in parentheses on the horizontal axis represent the Human Development Index (HDI) for each province
FM
Medium Wave/AM
Shortwave
73%
43%
57%
74%
34%
52%
48%
18%
47%
85%
36%
11%
79%
8%
26%
85%
17%
14%
86%
53%
43%
93%
25%
15%
95%
14%
7%
Northern (0.384)
Luapala (0.385)
Western (0.386)
Eastern (0.406)
Northwestern (0.453)
Central (0.458)
Southern (0.469)
Lusaka (0.513)
Copperbelt (0.552)
AudienceScapes National Media Survey Zambia, April 2010. N = 1413 respondents who listen to radio at least weekly

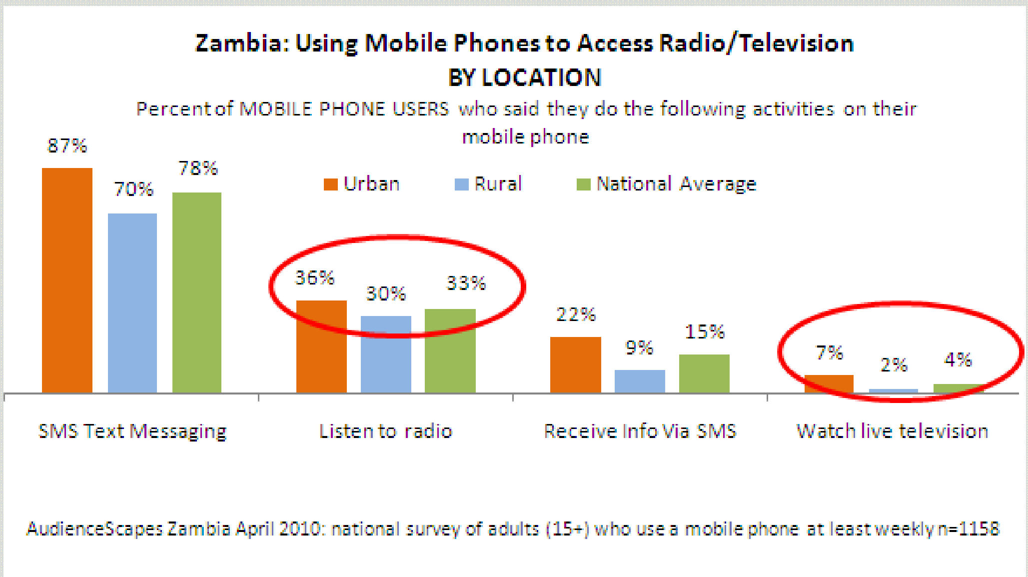
Listening to radio via mobile phones, the internet and satellite is also correlated with HDI rankings within the provinces -- the higher-HDI provinces such as Lusaka, Copperbelt, Central and Southern have higher levels of radio listenership via these delivery modes (Figure 1.4).

Figure 1.4



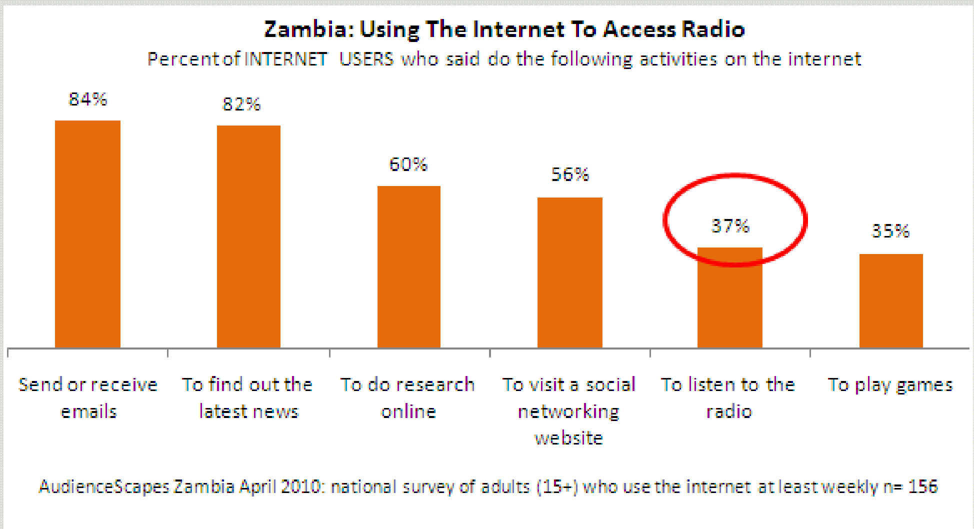
Using Mobile Phones and the Internet to Access Mass Media

As mobile phone access spreads across Zambia, many people are beginning to use their phones for functions other than basic calling or texting, including access to mass media. AudienceScapes survey results show that listening to the radio on a mobile phone is the second most-popular weekly non-voice activity for mobile phone users after SMS text messaging (see chart below). Thirty four percent of weekly mobile phone users said they use their phones to listen to radio. Accessing television via mobile phones is yet to become widely prevalent.



In general, using mobile phones to access mass media is more common among urban respondents than their rural counterparts. Among the various age groups, youth (15-24) are most likely to be listening to radio on their phones than older age groups. **Listening to the radio in this way gives access to those who are either travelling or not close to a radio set (at home or work).**

Internet penetration is still very low in Zambia; only 8 percent of respondents said they used the internet in the past week. Among these, about a third said they use the internet to listen to radio (see chart below).



Ib: Media Use

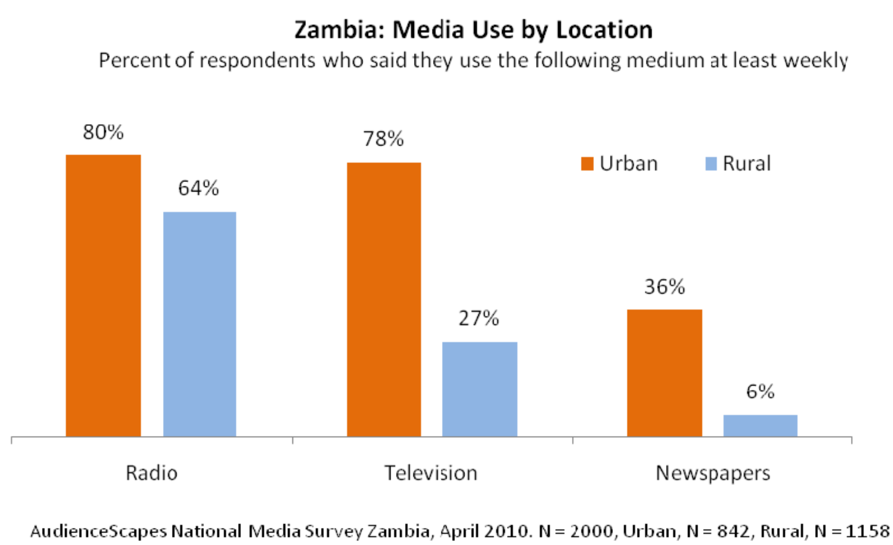
In addition to having household access to a mass media device, the frequency with which respondents say they use a medium[2], can illustrate evidence of shared use of media- such as communal television viewing, sharing newspapers among households, etc. It can also point out to instances of limited use of a medium despite its availability in the household, thus giving a more holistic view of media reach.

Measures in the survey of "media use" -- the frequency with which respondents said they USE a certain medium -- suggest that use outside the home is not a significant factor. In other words, there was very little difference between the percentage of people saying they have household access to a given medium and the percentage of people who said they use that medium regularly (compare Figure 1.5 with access figures above).

However, some *demographic* factors such as income and English language skills, as well as *geographic* location, seem to be correlated to medium use.

Figure 1.5 illustrates that **radio is the most widely used mass medium among both rural and urban populations and thus likely to be the most efficient way to reach the largest number and most diverse set of Zambians on a national scale**. Radio is thus is an important conduit through which development workers can communicate with both literate and economically advanced urban populations, as well poorer and illiterate populations at relatively similar costs.

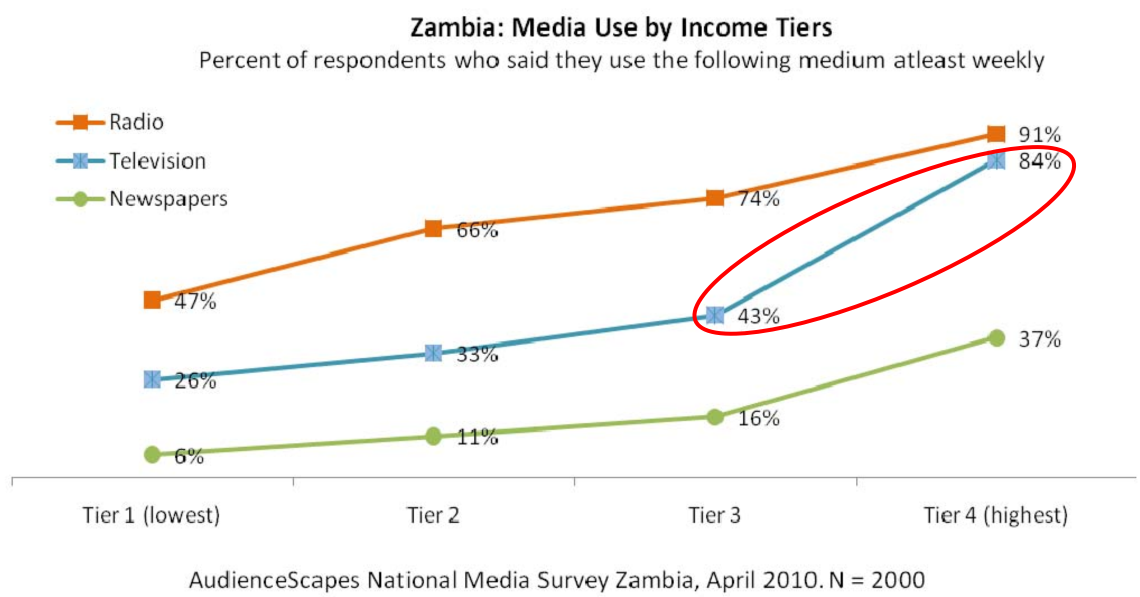
Figure 1.5



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

Income variation also comes into play in use patterns for Zambian media. Televisions rank low in weekly use by lower-income residents (Figure 1.6). For the poorest tiers of Zambian society, radio is the most important (and sometimes only) source of news and information. As income increases, weekly use for both radio and television increase. In fact **the rate of television viewership among respondents in the top income tier (tier 4) is nearly double that of respondents in tier 3**.

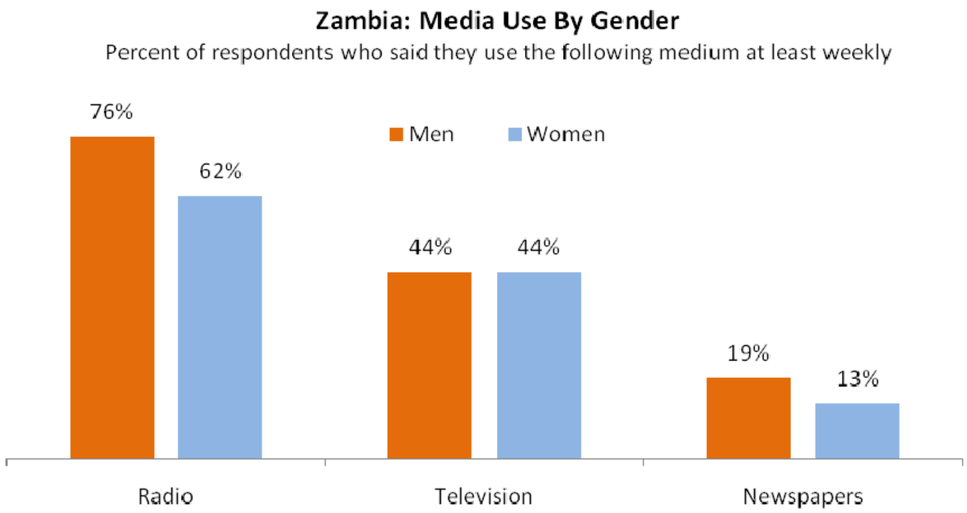
Figure 1.6



Newspapers, however, are not a particularly widespread source of information for any income tier and are only marginally significant sources for the wealthiest (37 percent of the wealthiest said they read newspapers weekly, compared to 84 percent who watch television weekly).

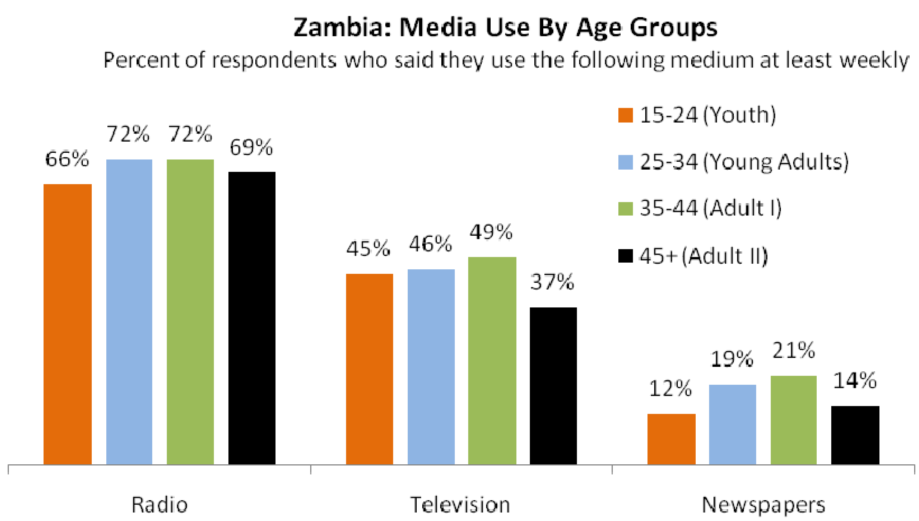
There is only a slight gender gap for weekly radio use (Figure 1.7A). In general, age is not a strong determinant of access or regular use (Figure 1.7B).

Figure 1.7 A



AudienceScapes National Media Survey Zambia, April 2010, N = 2000 of which 998 are men and 1002 are women

Figure 1.7 B



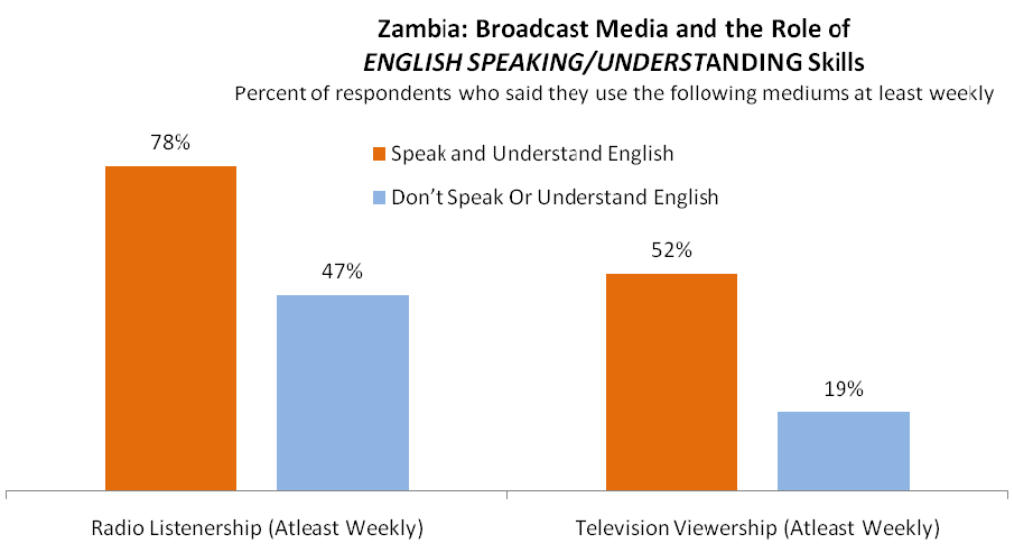
AudienceScapes National Media Survey Zambia, April 2010. N = 2000, of which 757 are youth, 657 are young adults, 323 are part of Adult I and 263 are part of Adult II

Knowledge of English (both speaking and reading) appears to be a determining factor in Zambians' media use (Figures 1.8 and 1.9), especially for television viewership and newspaper readership.

Twenty-four percent of AudienceScapes survey respondents said they neither speak nor understand English, with the percentages coming in higher in less-developed provinces such as Luapala (46 percent) and Southern (38 percent). The inability to speak and understand English is also greater among women than men and for those in the lowest income tier in our survey (40 percent in the lowest Tier 1, compared to 5 percent in the highest Tier 4).

Although radio stations (especially state-run stations and community stations broadcasting in specific provinces) often broadcast content in vernacular languages, television stations broadcast mostly in English.[3] State-run ZNBC TV has 35 minutes of vernacular content every day. Figure 1.8 shows the relationship between English skills and television viewership. Note that weekly television viewership is most affected by levels of English skills.

Figure 1.8



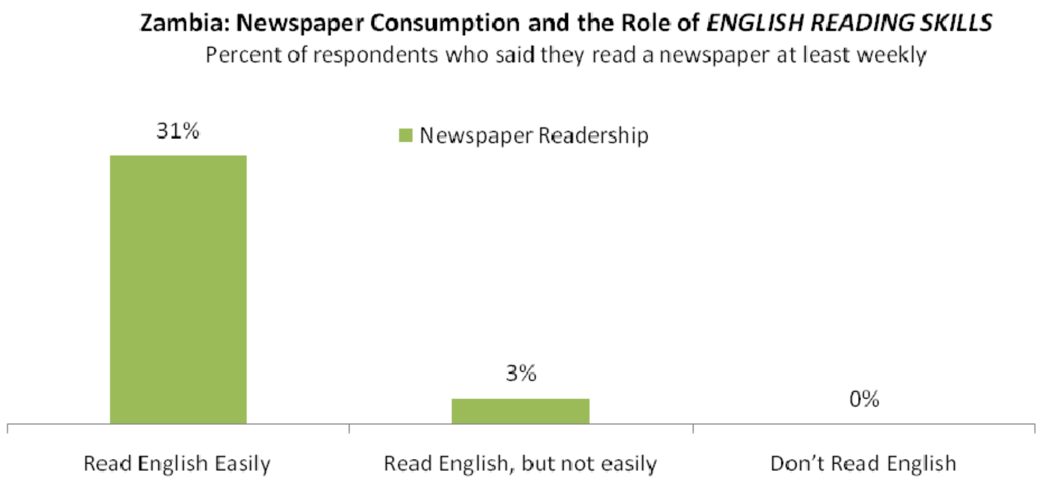
AudienceScapes National Media Survey Zambia, April 2010. N = 2000, of which 1573 speak and understand english and the the rest do not

[3] Zambia 2009. African Media Barometer. Published by the Media Institute of South Africa and FES Media Africa. Available here: http://fesmedia.org/uploads/media/AMB_Zambia_2009_English.pdf and http://www.iicd.org/articles/iicdnews.2004-12-14.1069141762#ComRad, Page 32.

Twenty-four percent of our respondents said they do not read English at all, and 28 percent said they are unable to read English easily.

All nationally available daily Zambian newspapers publish in English and thus have limited reach among those who cannot read English (Figure 1.9).

Figure 1.9



AudienceScapes National Media Survey Zambia, April 2010. N = 2000, 1023 read English easily, 543 not easily and 434 do not read English at all

The Hyper Users -- Those Who Use Media Daily

The figure below shows the proportion of respondents from each income tier, gender and location type who said they listen to the radio or watch TV daily. These hyper users have greater representation among males, urbanites and those with relatively higher incomes.

Zambia: Radio, Television Hyper-Users (DAILY USE)
Percent of respondents who said they listen to radio or watch television DAILY

		Radio	Television
Location	**Urban**	67%	68%
	Rural	49%	19%
Income	**Tier 1 (lowest)**	33%	18%
	Tier 2	52%	28%
	Tier 3	60%	30%
	Tier 4 (highest)	80%	74%
Gender	**Men**	48%	35%
	Women	63%	36%

AudienceScapes National Media Survey Zambia, April 2010. N = 2000

Ic: News Source Preferences and Opinion Leadership

Development strategists sometimes focus communication and information-sharing efforts on influential members of a group, under the assumption that such people (*opinion leaders*) will have a disproportionate impact on the views and attitudes of the group as a whole. The concept of opinion leadership is applied in many areas of social science research, notably in science communication and election studies, to understand how some individuals exert relatively strong sway on a general population.[4]

In the AudienceScapes framework, we define opinion leaders as those to whom others turn most for information and perspectives on various issues.[5]

[4] Matthew Nisbet, Ph.D, Professor at American University, "A Two Step Flow of Influence? Opinion Leader Campaigns on Climate Change" Science Communication, March 2009, 30.

[5] Zambian opinion leaders were defined as the top third of Zambians with the highest cumulative points on four items: (1) how often people came to a respondent to get news and information; (2) how often respondents discussed news and information

As Figure 1.10 illustrates, opinion leaders in Zambia are not very distinct demographically; they tend to mirror the general population in terms of distribution across regions, ages and tiers of income, though more opinion leaders tend to be male and relatively older than the average.

Figure 1.10

Zambia: Opinion leaders Compared to the General Public
Percentages represent proportion of each demographic type within group of opinion leaders or general population

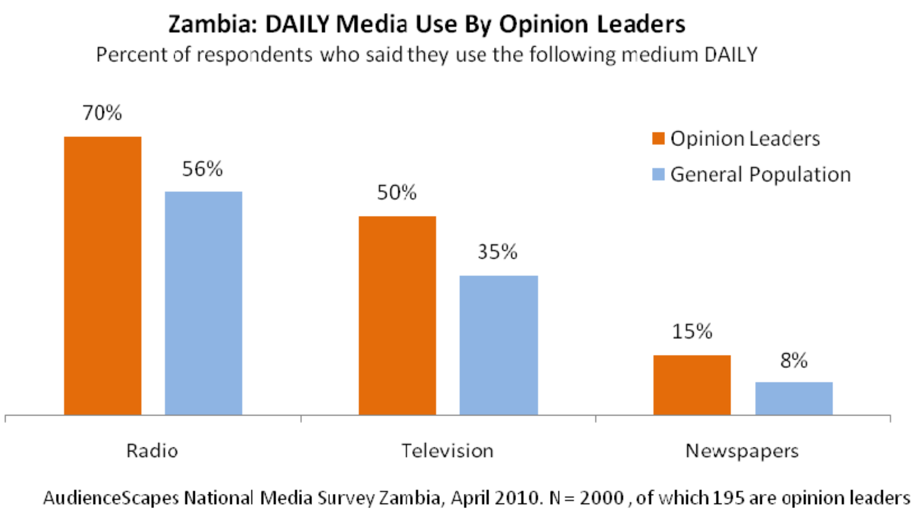
	General Population	Opinion Leaders		General Population	Opinion Leaders
Gender			**Location**		
male	50.7%	57.9%	*Rural*	66%	64.2%
female	49.3%	42.1%	*Urban*	34%	35.8%
Age			**Income**		
youth	35.6%	28.5%	*tier 1 (lowest)*	18.8%	17.1%
young adult	30.4%	32.8%	*tier 2*	35.2%	33.6%
adult 1	14.5%	12.6%	*tier 3*	26.9%	25.5%
adult 2	19.4%	26.1%	*tier 4 (highest)*	19.1%	23.9%

AudienceScapes National Media Survey Zambia, April 2010. N = 2000, and N = 195 for Opinion Leaders

with others in their community; (3) how often people asked the respondent for their opinion or advice on major news stories; and (4) the number of people looked to the respondent for their opinion or advice on major topics in the news.

Opinion leaders also appear to be more intensive users of all mass media (Figure 1.12).

Figure 1.12



Interestingly, friends and family emerge as important sources of information for opinion leaders, suggesting that they are as keen to gain and share knowledge via word-of-mouth sources as media sources (Figure 1.13).

Figure 1.13

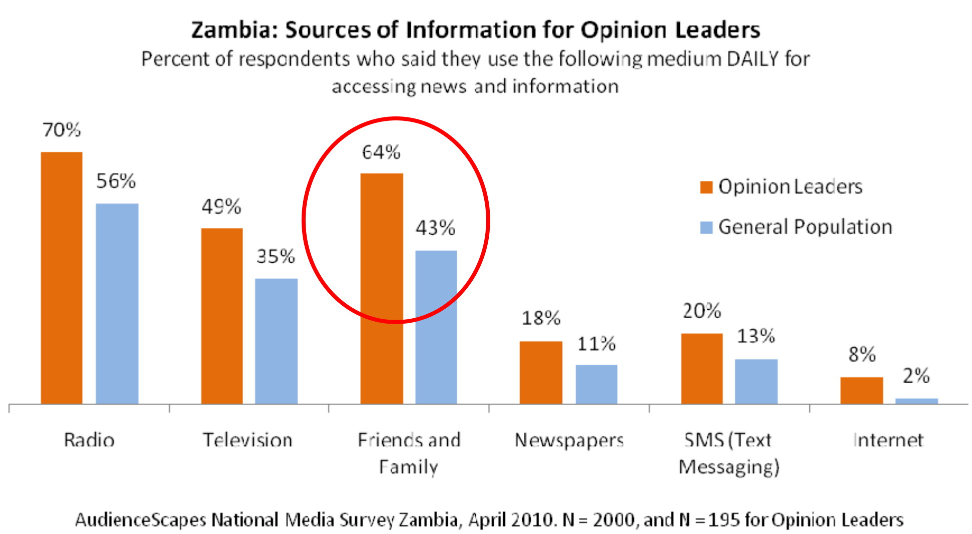
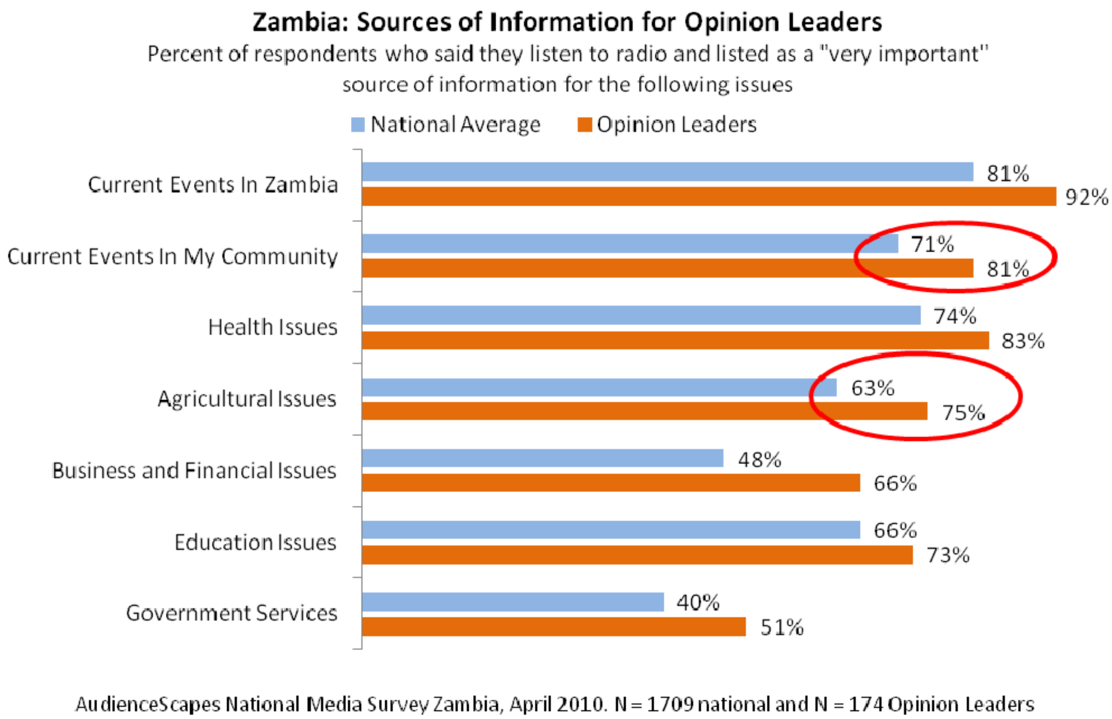


Figure 1.14 shows the range of subjects that opinion leaders and Zambians as a whole focus on when they listen to the radio. Regardless of medium (*Figure 1.14 shows results for radio, but they are similar for television and newspapers*), **Zambian opinion leaders pay significantly more attention to business and financial news, agricultural issues, and government services information than the general population**. National and local current events information is also popular among opinion leaders in comparison to the general public, particularly for radio listeners.

Figure 1.14



Chapter 2: Barriers to Media Use and Access

Here we profile *non-users* of media and those without access to media. Often, such groups are the same that are of interest to development practitioners, and it is thus instructive to know about the challenges faced in reaching these people.

For the purpose of this report, non-users are defined as those who had never used a given medium.

Figure 2.1 lists the common reasons cited by the general public and opinion leaders deterring their access and use of the three mediums. Common deterrents of media use are closely linked to issues of media access.

Figure 2.1

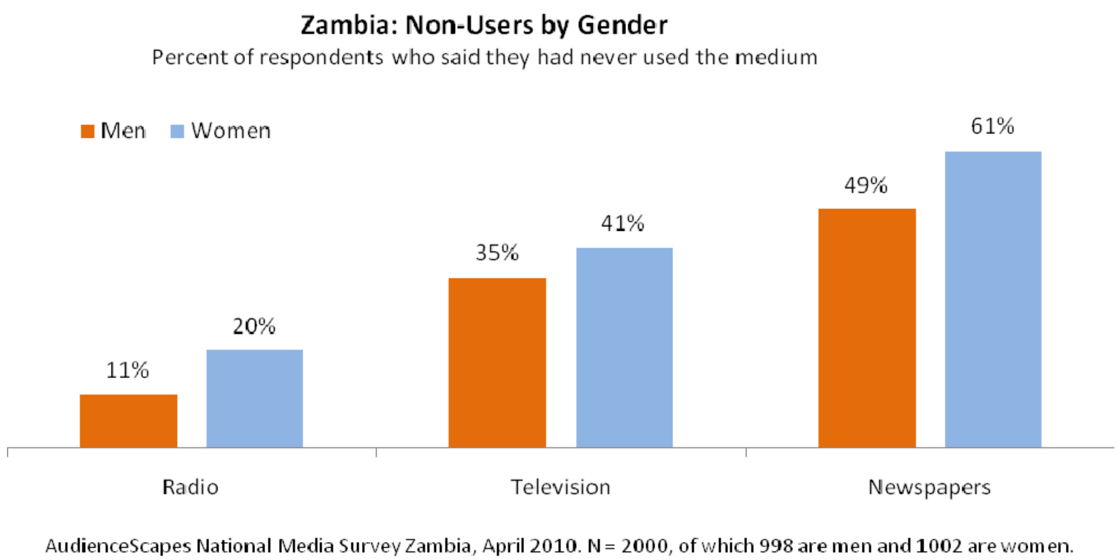
Zambia: Most Common Reasons for Non-Use of Mediums by General Public				
Radio non-use:	Don't own radio 77%	Too expensive to buy 33%	Problems with electricity 28%	No available radio signals 24%
Television non-use:	Don't own television 89%	Too expensive to buy 43%	Problems with electricity 33%	No available TV signals 14%
Newspaper non-use: (general	Newspapers not available in their area 45%	Too expensive to buy newspapers 28%	Difficult to understand 29% Not Interested 16%	Can't read newspapers 42%

AudienceScapes National Media Survey Zambia, April 2010.
Radio: all non users = 291, Television: all non users = 682, Newspapers : all non users = 1031

IIa. Radio

Radio access has reached near-universal penetration in Zambia. However, women are more likely than men to have never listened to radio (Figure 2.2).

Figure 2.2



Of all the non-listeners to radio, close to 70 percent of those belonging to the lowest three income tiers (tier 1, 2 and 3) said they do not own a radio. Thirty percent of these respondents also cited **lack of electricity** as an impediment. Non-users from the high-income tier 4, however, do not face any economic or infrastructural barriers -- their reasons for non-use are more likely to be **lack of time** (35 percent for tier 4, less that 15 percent from other income tiers cited this as a reason).

When non-listeners are broken down by location, **unavailability of radio signals** is a bigger impediment for rural respondents when compared to their urban counterparts (28 percent rural versus 7 percent urban cited this as a reason).

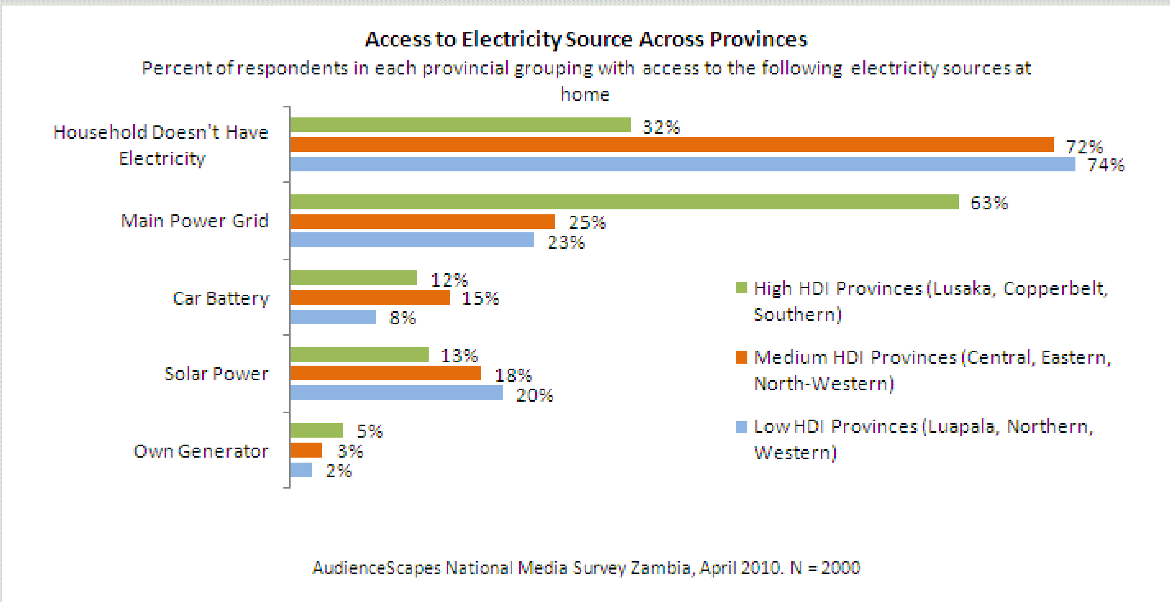
IIb. Television

Lack of television ownership at home, high costs of television units and problems with electricity are common issues mentioned by respondents as reasons that they cannot view TV (See Figure 2.1).

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

Close to one third of Zambians who said they have never watched television or never listened to radio cited "problems with electricity" as one of the reasons for non-use.

Lack of stable sources of electricity at home has an impact on the ability to access media and communication devices, and is disproportionately a problem in poorer and more rural provinces. Those in low-income provinces have much lower access to main power grids than those living in more developed provinces (see chart below).



Respondents in low and middle income provinces are more likely not to have access to electricity in their households. For low and middle income provinces, solar power and car batteries (in addition to the main power grid) are equally important sources of energy to power their media devices. In many cases, they have to rely on a combination of sources based on their availability at a given time. On the other hand, high income provinces have consistent access to the main power grid, and therefore are more likely to rely on it as singularly to power their media and communication devices. Those with high income (and in turn more stable electricity sources) are more likely to have access to media.

Notes:

Development levels of provinces were sourced from the Human Development Report- 2007. According to this, the HDI for the nine provinces of Zambia are: Central (0.458), Copperbelt (0.552), Eastern (0.406), Luapula (0.385), Lusaka (0.513), Northern (0.384), Northwestern (0.453), Southern (0.469), and Western (0.386). Available here: http://hdr.undp.org/en/reports/nationalreports/africa/zambia/name,3317,en.html

Less mentioned was the unavailability of television signals in some areas, especially rural (15 percent versus 10 percent in urban areas). Non-users from the low-income tier 1 category are more likely to cite expense as an obstacle to viewing television whereas for those with high incomes, reasons for non-use are more likely to be **lack of interest and lack of time**.

IIc. Newspapers

Only three newspapers publish daily in Zambia: the state-run *Times of Zambia* (which includes the *Sunday Times of Zambia*) and the *Zambia Daily Mail*, and the privately run *Post*. Since all three of the daily national newspapers publish in English, the ability to read English is clearly a potential obstacle to newspaper readership. **Forty two percent of non-readers cited "cannot understand" as a reason for not reading newspapers**. Women, compared with men, are more likely to say can't read, or find it too difficult to understand newspapers.

But the inability to read English is not the only barrier to newspaper readership. Only a third of those who said they could read English are regular newspaper readers. **Apart from the literacy barrier, 45 percent of non-readers said that "newspapers are not available in my area"**. The three daily newspapers are delivered to all nine provinces in the country but poor rural road networks prevent papers or magazines from getting to numerous areas.[6] *The Daily Mail* and *The Post* are printed in the capital Lusaka. *The Times of Zambia* is printed in Ndola, Zambia's second-largest city located in Copperbelt Province. All three try to circulate countrywide, but they reach only main cities within each province with a few copies daily, and sometimes quite late in the day.

In fact, this is substantiated by our survey as well -- non-availability of newspapers is the biggest reason for lack of readership among rural residents (53 percent of non-readers cite this as reason versus 10 percent of urban non-readers). Urban non-readers are more likely to cite lack of time (20 percent versus 8 percent rural) and say they are not interested in reading newspapers (28 percent urban versus 13 percent rural).

Readership is also limited by high costs. Newspapers can be relatively expensive at about K3,000 (60 US cents) a copy in a country where a loaf of bread costs K4,000 (80 US cents).[7] Newspaper readership increases with income (see chart 4B) and most newspaper readers reside in more developed provinces such as Lusaka, Copperbelt and Southern Provinces.

[6] Zambia 2009, African Media Barometer

[7] Zambia 2009. African Media Barometer. Published by the Media Institute of South Africa and FES Media Africa. Available here: http://fesmedia.org/uploads/media/AMB_Zambia_2009_English.pdf and http://www.irex.org/programs/MSI_Africa/2008/zambia.asp

Chapter 3: Media Outlet Preferences in Radio and Television

This chapter focuses on specific broadcast outlets. We classify Zambia's media landscape by ownership structure and level of reach to discuss what influences access and viewing patterns for *specific* outlets and whether some media outlets have a clear advantage in reaching the widest populations.

The audience for the most popular outlets is also broken down by geographic and demographic differences. In addition, we look within each of the nine provinces to describe the preferences for radio stations that lack a national reach but are nonetheless popular at a local level.

Previously, we highlighted the predominance of radio in Zambia's media landscape. **This radio market is dominated by state run ZNBC's three national-reach radio stations: Radio 1, Radio 2 and music/entertainment based Radio 4. Seventy-eight percent of weekly radio listeners in the AudienceScapes survey said they "often" listen to one of the state-run stations.** Zambia also has a few private, non-profit and community stations, which broadcast in English and/or local languages.[8]

For television viewers, state-run ZNBC TV dominates television viewership among those with access to a TV; most commercial stations are only available in Lusaka province.

IIIa: Radio

Each of the nine provinces has two or three non-profit radio stations with ranges typically limited to their home province. These stations are run mostly by non-profits and religious broadcasters, or by educational institutions to provide practical training for media students on the one hand, and relevant information for local communities on the other.

In principle, radio is in a position to provide multiple sources of news and information for Zambians, though the range of available stations varies considerably between rural and urban audiences. The developmental level of the province is also a key determinant of the level of access to radio stations, and therefore news and information.[9] Access also varies significantly by gender, age and income.

[8] Zambia is divided into nine provinces, each administered by an appointed deputy minister. Each province is subdivided into several districts with a grand total of 72 districts. The provinces are: Central, Copperbelt, Eastern, Luapula, Lusaka (capital region), Northern, North-Western, Southern, Western.

[9] Development levels of provinces were sourced from the Human Development Report- 2007. According to this, the HDI for the nine provinces of Zambia are: Central (0.458), Copperbelt (0.552), Eastern (0.406), Luapula (0.385), Lusaka (0.513), Northern

ZNBC's Reach

ZNBC was formally incorporated in 1988 and enjoyed a monopoly on the airwaves until 1994.[10] Figure 3.1 illustrates the ZNBC network's continued dominance despite the emergence of many competitors since the monopoly ended.

ZNBC benefits from an extensive broadcasting infrastructure, relative financial stability and ample broadcasting capacity – all of which non-state stations (whether commercial or non-profit) generally lack, given limited revenue streams available to them in a modest advertising market.

ZNBC radio runs a diverse range of programming including news, soap operas (foreign as well as locally-produced), religious and political discussion programs, children's shows (foreign and local), sports, and gender-specific programming. Most of the content on ZNBC is locally produced.[11]

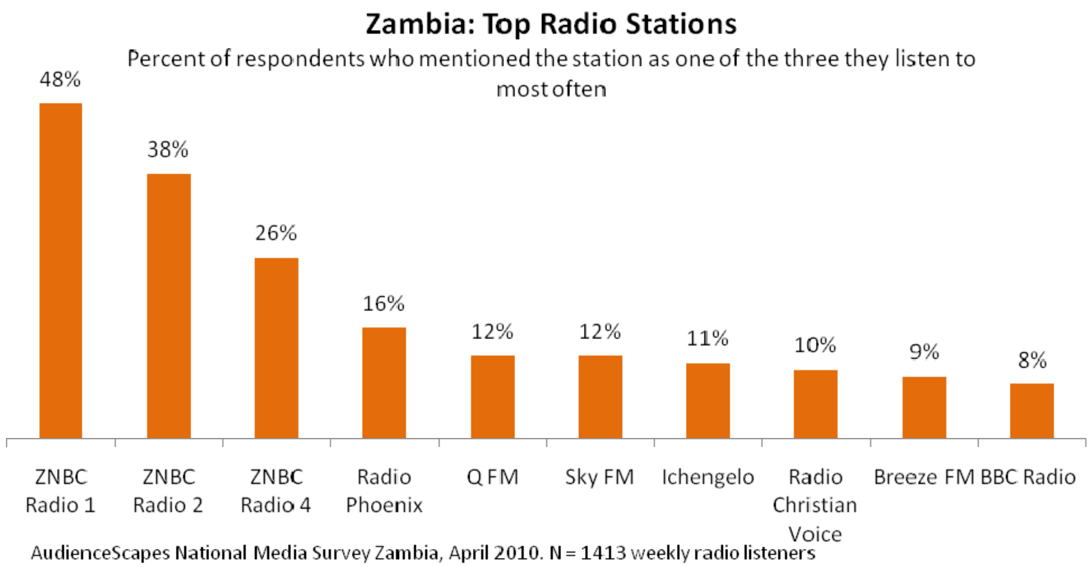
ZNBC's **Radio 1** broadcasts news and information, and also provides some cultural and development-oriented programming. It broadcasts in seven vernacular languages -- Bemba, Kaonde, Lozi, Lunda, Luvale, Nyanja and Tonga – all of which are run at different times of each day to provide equal access to the country's various linguistic communities. All vernacular languages get equal time across all locations -- that is to say that someone tuning into Radio 1 when it is broadcasting in Bemba will hear that language, no matter where in the country that listener is located.

(0.384), Northwestern (0.453), Southern (0.469), and Western (0.386). Available here: http://hdr.undp.org/en/reports/nationalreports/africa/zambia/name,3317,en.html

[10] http://www.misazambia.org.zm/downloads/ZNBC%20Public%20Discussion.pdf

[11] Fes Media Report

Figure 3.1



Radio 2 also broadcasts a mixture of news, culture and development-related programs, but exclusively in English; **Radio 4,** the state's entertainment channel, also broadcasts in English and is available on FM in most provinces. It consists mainly of Zambian and foreign music. [12]

The overall reach of ZNBC's stations ensures that the network gets a larger share of advertising revenues, whereas commercial stations generally struggle. Community radio stations and religious stations depend on bilateral aid or support from religious institutions or NGOs to sustain themselves.

ZNBC's market dominance may be a hindrance to free and fair media development. Though it is not completely controlled by the government, according to the African Media Barometer reports, the content produced and the freedom of reporting given to journalists is "suppressed by the nature and ownership of these institutions". In terms of news and current affairs, the African Media Barometer reports affirm that, "the state broadcaster is not at all balanced or fair in its reporting. The content on both ZNBC TV and radio continues to be heavily biased towards the ruling party and the government."[13]

[12] Zambia 2009, African Media Barometer

[13] Zambia 2009. African Media Barometer.(Page 16, 54)

Commercial stations began to spring up after 1994. Lusaka-based **Radio Phoenix** was the first commercial station to begin broadcasting that year. The African Media Barometer reports that there were 39 radio stations operating in Zambia in 2009 -- including the three state-run stations, as well as a wide variety of commercial, community, educational and religious stations (see appendix).[14] [15]

According to the AudienceScapes survey, Radio Phoenix and **Q FM** are the top two commercial stations in that order, based on a survey question asking weekly radio listeners to name up to three stations they tune into most often.

Radio Phoenix broadcasts from Lusaka province and can be heard in four provinces -- Southern, Lusaka, Central and Copperbelt. Its long-term plan reportedly is to have nationwide reach. Phoenix Radio has caught official flak in the past for broadcasting content deemed critical of the government, and the station was shut down briefly in 2001.[16]

Radio Q-FM is a local commercial radio station broadcasting in English 24 hours a day from Lusaka province.[17] It targets young listeners[18] with music and entertainment. Radio Q-FM started transmitting on October 1, 2010. It was the second commercial radio station to be licensed in Lusaka area.[19]

Breeze FM (99.6 FM) and **Sky FM** are also commercial stations.[20] Breeze FM, broadcasting from Chipata, Eastern province, includes community-based programming despite its status as a commercial channel. Its shows have included segments on health topics such as prevention of cholera and malaria and how to deal with various issues related to HIV and AIDS.[21] The Breeze

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[14] Zambia 2009. African Media Barometer. Published by the Media Institute of South Africa and FES Media Africa. Available here: http://fesmedia.org/uploads/media/AMB_Zambia_2009_English.pdf

[15] http://sockom.helsinki.fi/commedia/Muzyamba%20The%20Experience%20of%20Community%20media%20in%20Zambia.pdf

[16] http://allafrica.com/stories/200108230074.html

[17] http://www.qfmzambia.com/aboutus.php

[18] http://www.qfmzambia.com/aboutus.php

[19] http://www.qfmzambia.com/aboutus.php

[20] Phoenix, Q FM, Breeze and Sky are all commercial, but also affiliated to Zambia Community Media Forum (ZaCoMeF), an umbrella body representing the Zambian community media sector (newspaper/radio/TV etc)Membership of ZaCoMeF is drawn from all the nine provinces of Zambia.[20] The formation of the Zambia Community Media Forum (ZaCoMeF) in 2004 was an attempt at operationalising "community radio" and other forms of community media.

[21] http://www.breezefmchipata.com/about

website also mentions governance-related programming -- both at the local level and the national government level. Government officials in the community are regularly interviewed and participants are allowed to call in.

Sky FM broadcasts from Monze, Southern Province and broadcasts a wide variety of programming including live phone-in programs. But in July 2009, the government asked Radio Sky FM to censor the content of its programs, saying that callers to the private, commercial radio station were using it to insult the president and other government leaders.[22]

Ichengelo, broadcasting from Copperbelt, and **Radio Christian Voice** in Lusaka Province, are religious radio stations. They are part of a larger trend in Zambia in the past decade whereby various religious institutions (notably Catholic dioceses and parishes) have launched radio stations.

BBC radio is the only international station to rank among those most mentioned by AudienceScapes survey respondents. Foreign stations are allowed to broadcast in Zambia, but the government blocks local community media from broadcasting foreign news programs, as it believes that community media should focus on local issues. [23] A look at the BBC schedule on its website shows that it is available through its SW service and two of its own local FM broadcasting stations in the capital Lusaka (98.0 FM), and Kitwe, Northern Province (102.8 FM). In addition, BBC news relays can be heard on Breeze FM, which broadcasts from Chipata, Eastern Province (99.6 FM). [24]

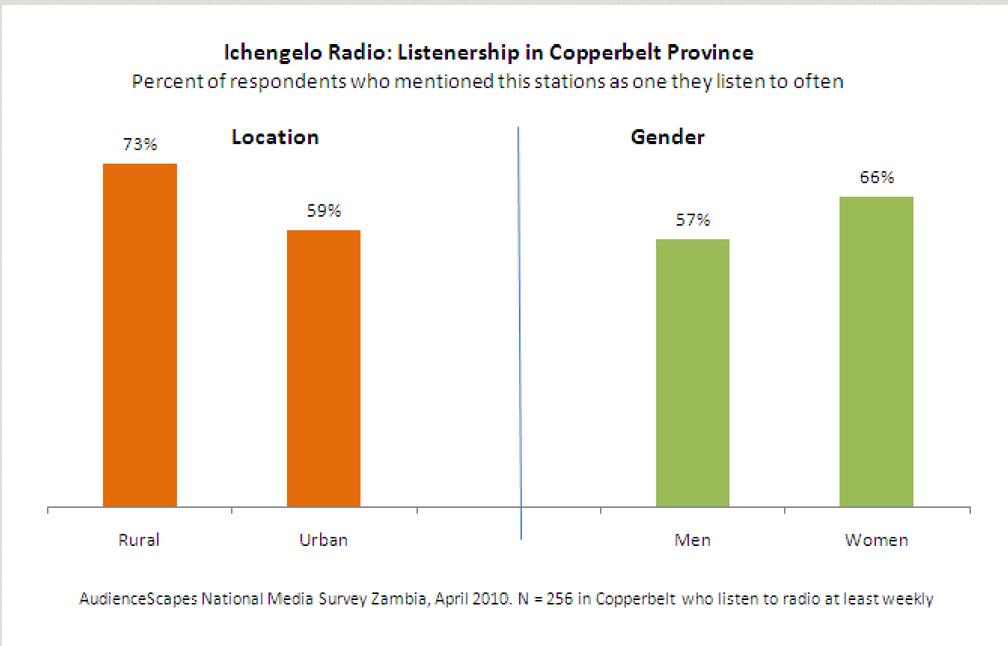
[22] Zambia 2009. African Media Barometer. Published by the Media Institute of South Africa and FES Media Africa. Available here: http://fesmedia.org/uploads/media/AMB_Zambia_2009_English.pdf

[23] IREX Media Sustainability Index (MSI) Zambia, 2008. Available here: http://www.irex.org/programs/MSI_Africa/2008/zambia.asp

[24] http://www.bbc.co.uk/worldservice/institutional/2009/03/000000_ews_africa.shtml

Religious Radio in Zambia

Religious stations have sprouted up in many provinces of Zambia over the past decade. Most, though not all, are run by a diocese and are available to listeners in the district or province from which they are broadcast. In addition to religious content, many of these stations provide locally relevant information and community-based programming. Most of these stations are sustained by a combination of grants, donations, contributions, advertising and sponsorship.



Some of these stations are extremely popular at the local level, such as Radio Ichengelo in Copperbelt which is owned and operated by the Diocese of Ndola city. It broadcasts in English, Bemba and Lamba and its signal covers the entire Copperbelt Province and some parts of the neighboring provinces. The *Times of Zambia* reports[1] that the station has generated community-level debate on issues such as the constitution, human rights, good governance, gender issues, children's rights, and of course religious issues. In fact, Radio Ichengelo leads the pack among the stations that Copperbelt residents said they listen to most often (61 percent mentioned it as one of their top three stations). Rural dwellers are more likely than urbanites to say they listen to Ichengelo often. In addition, women listen often in higher proportions than men (see chart above).

Radio Christian Voice, a non-profit religious radio station owned and managed by Christian Vision International, is widely heard in Lusaka, Luapala, Northern, Northwestern and Copperbelt Provinces (see Figure 3.8 for more details on proportion of listeners in each province). Its popularity could be a result of its multilingual broadcasts and technical capabilities. See the Appendix for complete list of religious stations operating in Zambia.

1. http://www.times.co.zm/news/viewnews.cgi?category=8&id=1147283597

Listenership Breakdown by Demographic Groups

The overall national ratings in Figure 3.1 mask differences in listenership among different demographics groups. Following are audience profiles of a number of the top stations:

Figure 3.2

Zambia: Radio 1- Popularity Level by Demographic Group Percentage of those in each demographic group who mentioned Radio 1 as one of the three they listen to most often			
By Age Groups		**By Income Groups**	
15-24	41%	Tier 1 (lowest)	44%
25-34	48%	Tier 2	57%
35-44	50%	Tier 3	48%
45+	58%	Tier 4 (highest)	40%
By Gender		**By Setting**	
Men	49%	Urban	30%
Women	47%	Rural	59 %
AudienceScapes National Media Survey Zambia, April 2010. N = 1413 weekly radio listeners			

ZNBC's Radio 1 appears to get relatively lower popularity ratings among youth (those between 15-24) than with older age groups (Figure 3.2). It is more popular with rural listeners than urban dwellers. Note that Radio 1 also broadcasts some programming targeted at particular sub-groups such as rural women (for example, the station runs a program using content generated by rural women and by rural radio listening clubs).[25] In fact, **the rate of listenership for Radio 1 among rural women is nearly double the rate among urban women** (58 percent versus 31 percent).

Listenership for Radio 2 remains more or less stable across all demographic groups analyzed (Figure 3.3). Figure 3.4 shows that Radio 4's popularity is strongest among youth/young adults (15-24) and those between 35 and 45. It is also more popular (or perhaps more accessible) in urban areas.

[25] Zambia Africa Media Development Initiative with BBC- Report available at http://www.bbc.co.uk/worldservice/trust/researchlearning/story/2006/12/061208_amdi_zambia.shtml

Figure 3.3 (left) and 3.4 (right)

Zambia: Radio 2- Popularity Level By Demographics Group Figures represent percentages of those who named this station as one of three they listen to most often			
By Age Groups		**By Income Groups**	
15-24	36%	Tier 1 (lowest)	32%
25-34	36%	Tier 2	40%
35-44	39%	Tier 3	39%
45+	41%	Tier 4 (highest)	36 %
By Gender		**By Setting**	
Men	38%	Urban	33%
Women	37%	Rural	41 %
AudienceScapes National Media Survey Zambia, April 2010. N = 1413 weekly radio listeners			

Zambia: Radio 4- Popularity Level By Demographic Group Figures represent percentages of those who named this station as one of three they listen to most often			
By Age Groups		**By Income Groups**	
15-24	31%	Tier 1 (lowest)	25%
25-34	24%	Tier 2	24%
35-44	30%	Tier 3	21%
45+	20%	Tier 4 (highest)	38%
By Gender		**By Setting**	
Men	28%	Urban	40%
Women	25%	Rural	18 %
AudienceScapes National Media Survey Zambia, April 2010. N = 1413 weekly radio listeners			

Figure 3.5 (left) and 3.6 (right)

Zambia: Radio Phoenix- Popularity Level by Demographic Group Figures represent percentages of those who named this station as one of three they listen to most often			
By Age Groups		**By Income Groups**	
15-24	19%	Tier 1 (lowest)	8%
25-34	14%	Tier 2	12%
35-44	17%	Tier 3	18%
45+	15%	Tier 4 (highest)	25%
By Gender		**By Setting**	
Men	17%	Urban	30%
Women	16%	Rural	8 %
AudienceScapes National Media Survey Zambia, April 2010. N = 1413 weekly radio listeners			

Zambia: Q FM-Popularity Level by Demographic Group Figures represent percentages of those who named this station as one of three they listen to most often			
By Age Groups		**By Income Groups**	
15-24	16%	Tier 1 (lowest)	16%
25-34	11%	Tier 2	7%
35-44	11%	Tier 3	6%
45+	6%	Tier 4 (highest)	20%
By Gender		**By Setting**	
Men	12%	Urban	17%
Women	11%	Rural	9%
AudienceScapes National Media Survey Zambia, April 2010. N = 1413 weekly radio listeners			

Phoenix Radio gets high ratings among higher-income respondents (Figure 3.5). In addition, its audience seems to be largely urban. As mentioned earlier, Q FM is targeted at young listeners; the AudienceScapes survey indicates slightly more exposure among those 15-24 compared to older age segments (Figure 3.6). Both of these stations are proportionally most popular among higher-income respondents.

Geographic Breakdown of Listenership

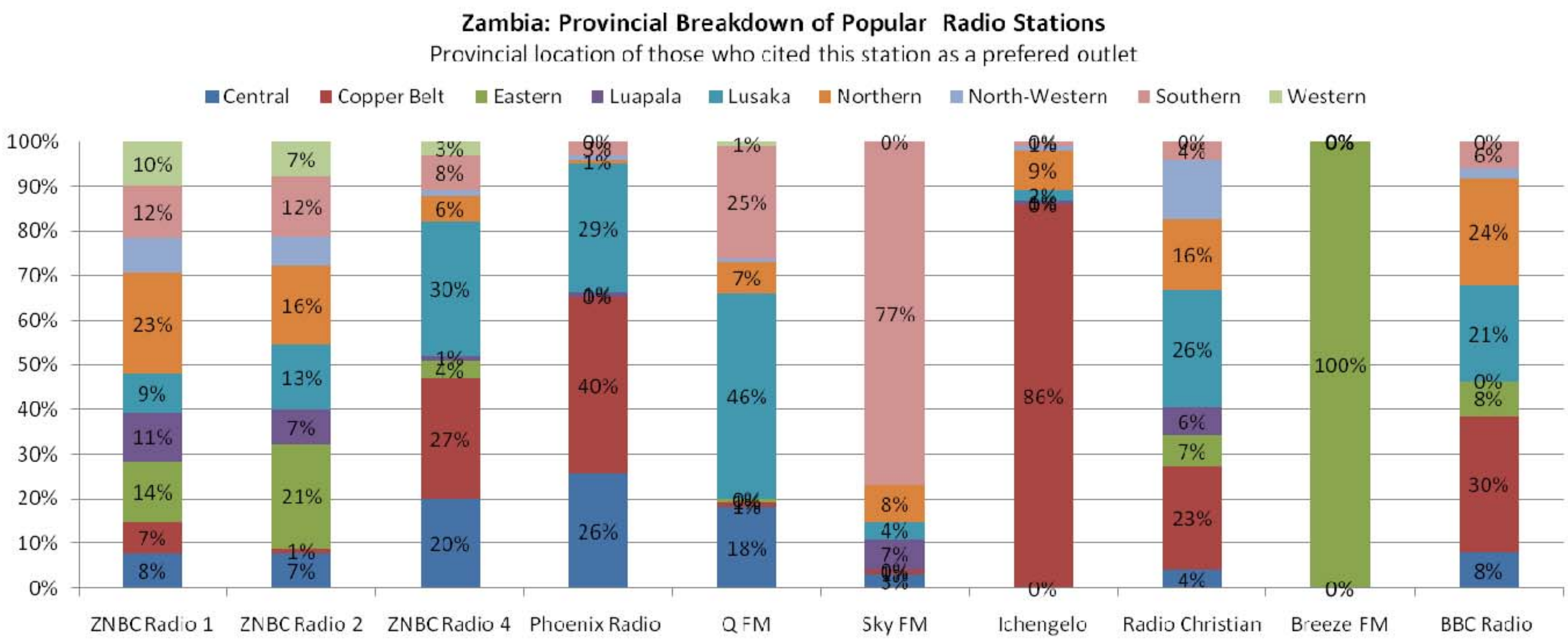
Patterns of radio station listenership among Zambia's nine provinces reflect both the reach of outlets' broadcast signals as well as the local appeal of their particular combinations of language and content.

To illustrate each top station's geographic reach, Figure 3.7 shows a provincial breakdown of those respondents who mentioned a particular station as one of their preferred outlets. The chart indicates that **state-run Radios 1, 2 and 4 seem to have fairly diverse spreads of listeners around the country**; the same is true for Phoenix Radio and Q FM. Meanwhile, FM relays of the BBC World Service were mentioned most often as a preferred radio choice by respondents in Lusaka province, Copperbelt and Northern Province.

Other stations have clear regional focuses. For example, Breeze FM, broadcasting from Chipata in the Eastern Province, is only selected as a top radio station by respondents in that part of the country. Sky FM is most popular in the Southern Province and Ichengelo holds court in the Copperbelt Province. Radio Christian Voice, operating from the outskirts of Lusaka since 1993, has multilingual broadcasts[26] and along with better broadcast capabilities, is able to reach a more diverse audience in Lusaka, Copper Belt and Northern Province.

[26] Station Website http://www.voiceafrica.net/newgraphicsite/station/station.htm

Figure 3.7



AudienceScapes National Media Survey Zambia, April 2010. N = 1413 weekly radio listeners

The Role of Community Radio Stations

A common limiting factor for most of the popular commercial stations (Phoenix Radio, Sky FM, Q FM) is that they broadcast exclusively or nearly exclusively in English despite the fact that 24 percent of AudienceScapes survey respondents said they do not speak nor understand English. This number is higher in less-developed provinces such as Luapala (46 percent) and Southern (38 percent). The inability to speak and understand English is also greater among women (28 percent) than men (19 percent) and for those in the lowest income tier in our survey (40 percent, compared to 5 percent for those in the highest income tier).

In addition, most commercial stations broadcast from urban, relatively better-off sections of Zambia; as FM stations, their broadcast signals have limited geographical reach. Most commercial stations broadcast from Lusaka and are unable to reach a national audience. In the interest of remaining economically viable, they focus largely on music and entertainment.

In the late 1990s, non-commercial radio stations began to spring up to address news and information voids at the local level. Most of these stations were operated by non-profit or religious institutions. Some were evangelical, while other non-profit stations broadcast in small geographic areas (districts or provinces) and provided locally-oriented community news and information and updates on development issues. These are generally referred to as community radio stations.

Unlike in some other African countries, **Zambia has no specific law or regulatory framework to support or promote the creation of community media outlets**. The Independent Broadcasting Authority (IBA) recognizes community media as a special sector within radio broadcasting, but it does not expand on the sector's functions or provide any legislation to facilitate its growth.[27]

Each of the nine provinces has two or three community radio stations, which have a limited range, usually broadcasting only within a district or within a radius of 50 to 150 kilometers.[28] As a result, they were note likely to be mentioned as preferred outlets by many respondents in the AudienceScapes national survey. However, if development practitioners are formulating communication and information strategies within specific provinces, then it would be important to keep some of these community media stations in mind (See the Appendix for a detailed list of non-state community stations in Zambia). Figure 3.8 shows the most-mentioned radio stations within each province.

[27] http://www.iicd.org/articles/iicdnews.2004-12-14.1069141762#ComRad

[28] Zambia 2009. African Media Barometer

Figure 3.8: Top Stations WITHIN Provinces

Percent of respondents WITHIN each province who mentioned the station as one of the three they listen to most often.

Red Text – State Radio; Black– Commercial Radio; Purple Text – Non-Profit Radio (rel) – religious (edu) – educational (com) – community; Green- Foreign Broadcaster

Copperbelt	
Ichengelo (rel)	61%
Radio 4	45%
Phoenix Radio	43%
Radio Christian Voice (rel)	15%
Radio 1	21%
Radio 2	27%

Lusaka	
Radio 4	55%
Q FM	37%
Radio 2	34%
Phoenix Radio	32%
Radio 1	29%
Radio Christian Voice (rel)	18%
Hone FM (edu)	14%
Hot FM	11%
BBC Radio	10%

Eastern	
Breeze FM	56%
Radio 2	53%
Radio 1	45%
Radio Maria (rel)	27%
Pasme FM (com)	24%
Chikaya (com)	15%

Southern	
Sky FM	69%
Radio 1	41%
Radio 2	32%
Q FM	22%
Radio Chikuni (rel)	22%
Radio 4	16%

Northern	
Radio 1	79%
Radio 2	44%
Flava FM	23%
Radio Mano (com)	23%
BBC Radio	14%
Radio 4	12%
Radio Christian Voice (rel)	12%
Radio Luapala (com)	10%

Central	
Radio 4	54%
Phoenix Radio	43%
Radio 1	39%
Radio 2	27%
Q FM	22%
Radio Marantha (rel)	16%
Radio Mkhushi (com)	11%

Western	
Radio 1	75%
Radio 2	45%
Radio Liseli (rel)	31%
Radio Lyambai (com)	25%
Parliament (edu)	11%
Radio 4	11%

Luapala	
Radio 1	84%
Radio 2	41%
Radio Luapala (com)	39%
Radio Yangeni (rel)	21%
Sky FM	13%
Radio Christian Voice (rel)	10%

North-Western	
Radio 1	67%
Radio 2	40%
Radio Christian Voice (rel)	24%
Radio Solwezi (rel)	12%
FCC Radio (rel)	11%

AudienceScapes National Media Survey Zambia, April 2010. N = 1413 weekly radio listeners. N = 126 Central, 256 Copperbelt, 191 Eastern, 78 Luapala, 245 Lusaka, 186 Northern, 72 Northwestern, 180 Southern, 79 Western.

The ZNBC stations' rankings vary by province; they tend to be less dominant in the more-developed Lusaka, Central, Eastern, Copperbelt and Southern, which have a larger variety of commercial and community radio outlets. Conversely, ZNBC stations rule the roost in less developed and sparsely populated provinces. [29]

In Lusaka, many respondents listen to ZNBC's entertainment based Radio 4, but this is in combination with these FM stations. In Copperbelt, the market is completely dominated by religious station Ichengelo, and ZNBC's Radio 1 and 2 drop back on the list. In Eastern and Southern, ZNBC competes with Sky FM and Breeze FM. Respondents in these provinces are thus likely to receive information from a wide variety of sources on the radio.

Chikuni, a community station popular in Southern Province, broadcasts some HIV/AIDS programming along with other issues such as agriculture.

Radio Phoenix, broadcasting from Lusaka, is especially popular in **Copperbelt province** and **Central province**. Community radio stations also garner high listenership in both provinces.

Radio Stations Run by Educational Institutions

Some non-profit stations are run by educational institutions and fulfill the dual purpose of training their students enrolled in media courses as well as delivering locally relevant information in their communities. Educational stations that showed up in the AudienceScapes survey include: Unza Radio (91.5 FM in Lusaka, mentioned by less than 10 percent of Lusaka province respondents as a preferred station), Parliament Radio (mentioned by 11 percent in Western province) and Hone FM (mentioned by 14 percent in Lusaka province).

Unza Radio is operated by the University of Zambia and gives its students of mass communications and community volunteers a chance to receive hands-on training in radio production and broadcasting.[30] In addition, it broadcasts community news and programming, and informs its listeners about development projects in the community. Hone FM, operated by the Evelyn Hone College of applied Arts and Commerce in Lusaka, mainly broadcasts Zambian

[29] Development levels of provinces were sourced from the Human Development Report- 2007. According to this, the HDI for the nine provinces of Zambia are: Central (0.458), Copperbelt (0.552), Eastern (0.406), Luapula (0.385), Lusaka (0.513), Northern (0.384), Northwestern (0.453), Southern (0.469), and Western (0.386). Available here: http://hdr.undp.org/en/reports/nationalreports/africa/zambia/name,3317,en.html

[30] http://www.unza.zm/index.php?option=com_content&task=view&id=259&Itemid=299

music (75 percent of its content, according to their website)[31], while giving its students training in radio production.

An Opportunity for Local Community Radio

Respondents in relatively poor provinces such as **Luapala, Northwestern and Western** seem to have less access or preference for non-state stations- both commercial and non-profit. In these areas listenership is focused on state radio. All of these provinces are sparsely populated (Northwestern has the lowest population density) and have little economic infrastructure. Most residents here are engaged in agriculture (subsistence or otherwise) or cattle grazing, with very little industrial activity. There are a few non-profit radio stations operating in these four provinces (see complete list in the Appendix), but most do not seem to reach a sizeable audience. State-run Radio 1 dominates listenership. Most of the community stations in these provinces -- Radio Lyambai, Radio Maria, Radio Christian Voice, Radio Solwezi and FCC Radio -- are religious radio stations.

Even though state-run radio dominates in less-developed provinces, survey questions regarding topical interests of listeners highlight potential opportunities for development organizations seeking to spread information via broadcasting conduits. While state-run radio does broadcast some development-related content, it is not very much nor is it necessarily suited to local needs in a given locality.

Many survey respondents in less-developed provinces said they have a strong interest in news stories about events in their community, agricultural issues (the main occupation in these areas) and health issues (see shaded region in Figure 3.9). **Local stations can capitalize on this and present themselves as fulfilling a niche in their province, thus competing better with national state-run radio networks**. Though Radio 1 and 2 do run some locally relevant programming, community stations might focus on crafting relevant content for their listeners to distinguish themselves from ZNBC as independent (from state control), culturally relevant and local sources of information on which their audiences can rely on.

[31] http://www.evelynhone.edu.zm/honefm.php

Figure 3.9

Zambia: How Much Attention Do You Pay To Stories About……?
Percent of respondent across provinces who answered "a great deal of attention" to the above question with respect to the topics listed below.

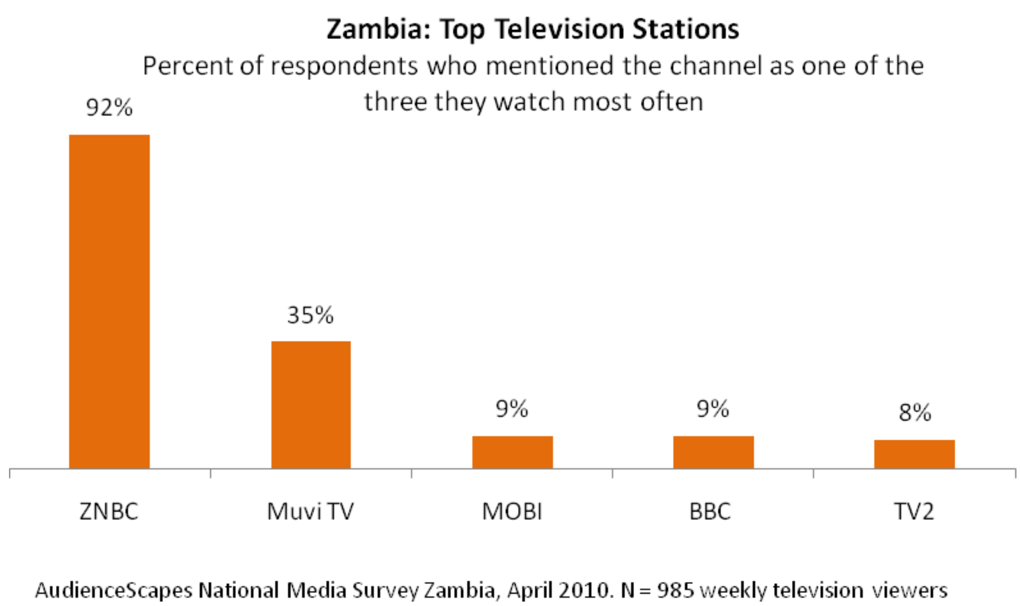
Provinces	Events in your community	Agriculture	Health Issues	Environment Issues	Crime and Violence	Sports	Entertainment	Politics	World Events	Business and the Economy
Lusaka	58%	37%	62%	31%	51%	43%	38%	34%	35%	38%
Southern	76%	62%	79%	58%	64%	48%	45%	45%	47%	47%
Copperbelt	60%	44%	60%	39%	42%	42%	38%	27%	40%	40%
Central	44%	43%	54%	30%	32%	20%	22%	26%	13%	25%
Eastern	65%	47%	48%	31%	34%	27%	32%	17%	17%	19%
Western	78%	54%	41%	27%	52%	31	41%	39%	35%	31%
North-Western	62%	71%	69%	46%	44%	37%	39%	51%	41%	35%
Northern	78%	69%	73%	39%	72%	58%	55%	30%	26%	43%
Luapala	69%	64%	67%	53%	55%	38%	36%	28%	51%	45%

AudienceScapes National Media Survey Zambia, April 2010. N = 2000

IIb: Television

Access to televisions is fairly widespread among residents of Lusaka and Copperbelt province (in the previous section, 70 percent of respondents in both locations said they have TV access). This is in sharp contrast to the country's less-developed provinces such as Western (14 percent have access), Northwestern (21 percent), Luapala (24 percent) and Eastern (26 percent).

Figure 3.10



For most Zambian television watchers, state run **ZNBC TV** is the only source of news and information on television. In addition, ZNBC has entered into a partnership with MultiChoice Africa, a multichannel digital satellite television operator, which makes ZNBC available via satellite connections. ZNBC was mentioned by 92 percent of weekly television viewers as a top-three viewed station.

ZNBC TV broadcasts daily news items in all the seven vernacular languages, with each language allocated five minutes per news items. They also broadcast different vernacular programs on different days.

While ZNBC TV has brief daily news broadcasts from 5 pm in the seven main local languages and a few vernacular programs, it is otherwise an English station.[32] This makes it rather inaccessible to the quarter of the population that does not speak or understand English. [33]

Apart from the province of Luapala, which has a very small proportion of television viewers, ZNBC is watched by roughly the same proportion of people across all of Zambia's provinces and is viewed by equal proportions of men, women and respondents of all ages and income levels (Figure 3.11).

Figure 3.11

Zambia: ZNBC TV- Popularity Level by Demographic Group Figures represent percentages of those who named this channel as one of three they watched most often			
By Age		**By Income**	
15-24	90%	Tier 1 (lowest)	89%
25-34	93%	Tier 2	89%
35-44	94%	Tier 3	94%
45+	96 %	Tier 4 (highest)	95%
By Gender		**By Setting**	
Men	92%	Rural	96%
Women	93%	Urban	90%
AudienceScapes National Media Survey Zambia, April 2010. N = 985 weekly television viewers			

Tables 3.12-3.15 show other demographic differences in preference among weekly television viewers for most mentioned television channels.

Muvi TV is a Lusaka-based free-to-air channel. [34] **MOBI TV** is currently free to air in Lusaka as well, but will soon have a subscription fee. Most of the viewers of Muvi TV and Mobi TV are in Lusaka province. Interestingly, for Muvi TV, viewership among men (34 percent of men say they watch often) is double that of women (16 percent). In addition, viewers of both these channels are twice as likely to be situated in urban areas as in rural locations.

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[32] Fes Media Pg 55

[33] http://www.misazambia.org.zm/downloads/ZNBC%20Public%20Discussion.pdf

[34] Zambia 2009, African Media Barometer

Figure 3.12 (left) and 3.13 (right)

Zambia: Muvi TV- Popularity Level By Demographic Group Figures represent percentages of those who named this channel as one of three they watched most often .			
By Age		**By Income**	
15-24	36%	Tier 1 (lowest)	41%
25-34	34%	Tier 2	33%
35-44	36%	Tier 3	24%
45+	32%	Tier 4 (highest)	40%
By Gender		**By Setting**	
Men	34%	Rural	22%
Women	16%	Urban	43%
AudienceScapes National Media Survey Zambia, April 2010. N = 985 weekly television viewers			

Zambia: Mobi TV- Popularity Level By Demographic Group Figures represent percentages of those who named this channel as one of three they watched most often .			
By Age		**By Income**	
15-24	7%	Tier 1	15%
25-34	9%	Tier 2	10%
35-44	13%	Tier 4	6%
45+	8%	Tier 5	8 %
By Gender		**By Setting**	
Men	9%	Rural	5%
Women	4%	Urban	11%
AudienceScapes National Media Survey Zambia, April 2010. N = 985 weekly television viewers			

Figures 3.14 (left) and 3.15 (right)

Zambia: TV 2 - Popularity Level by Demographic Group Figures represent percentages of those who named this channel as one of three they watched most often .			
By Age		**By Income**	
15-24	7%	Tier 1	14%
25-34	7%	Tier 2	7%
35-44	7%	Tier 4	5%
45+	4%	Tier 5	5%
By Gender		**By Setting**	
Men	5%	Rural	2%
Women	8%	Urban	12%
AudienceScapes National Media Survey Zambia, April 2010. N = 985 weekly television viewers			

Zambia: BBC TV- Popularity Level By Demographic Group Figures represent percentages of those who named this channel as one of three they watched most often			
By Age		By Income	
15-24	9%	Tier 1	3%
25-34	9%	Tier 2	7%
35-44	10%	Tier 4	9%
45+	6%	Tier 5	11%
By Gender		**By Setting**	
Men	9%	Rural	6%
Women	8%	Urban	10%
AudienceScapes National Media Survey Zambia, April 2010. N = 985 weekly television viewers			

Those living in more urban or developed provinces such as Copperbelt and Lusaka, have access to television stations broadcasting from cities. Satellite subscription services are available in

Lusaka. But television stations and satellite services have little viewership outside the urban and more affluent parts of the country. In addition, Zambian commercial television is unlikely to grow any faster without greater capital investment and ZNBC remains undisputed in having the largest viewership in the country among television viewers.[35]

Conclusion

Television and newspapers do not yet have large national reach in Zambia, and it is not clear when or if they will. Lack of economic resources, poor rural road networks and English illiteracy are all important barriers to access. Development organizations should be aware of the fact that many segments of the population will not be reachable through these media.

Radio, while clearly the most dominant and widespread medium, has yet to diversify sufficiently to offer its listeners a truly diverse range of choices for news and information sources. The obstacle here is economic -- since state-run ZNBC is dominant enough to have the widest national reach and broadcast in several local languages, private stations located in specific provinces find it hard to garner sufficient advertising revenues and expand beyond their small listener base. In order to reach a wider audience, the commercial stations choose to limit their political and news related content. Non-commercial radio stations that are focused on development-related issues are run by NGOs, religious organizations or educational institutions. While they are, in principle, catering to local information needs, their reach is limited and as our survey results show, they are unable to move to a wider, national audience outside the provinces from which they broadcast.

[35] Zambia Africa Media Development Initiative with BBC- Report available at http://www.bbc.co.uk/worldservice/trust/researchlearning/story/2006/12/061208_amdi_zambia.shtml

Appendix

Non-State Owned Radio Stations In Zambia

Community

Name	Location
Petauke Explorers Radio	Petauke, Southern Province
Pasme	Petauke, Southern Province
Radio Mkushi	Mkushi, Central Province
Mumbwa Radio	Mumbwa, Central Province
Radio Mano	Kasama, Northern Province
Lutanda Radio	Kasama, Northern Province
Radio Lyambai	Mongu, Western Province
Radio Mpangwe	Kateke, Eastern Province
Radio Chikaya	Lundazi, Eastern Province
Radio Luapala	Luapala Province

Educational

Name	Location	Additional Information
Unza Radio	Lusaka, Lusaka Province	Operated by University of Zambia. 91.5 FM in Lusaka
Hone FM	Lusaka, Lusaka Province	Operated by Evelyn Hone College of applied Arts and Commerce in Lusaka, mainly broadcasts Zambian music (75 percent of its content, according to their website), while giving its students training in radio production.
Parliament Radio	No information available	

Religious

Name	Location	Additional Information
Radio Ichengelo	Kitwe, Copperbelt	Ownership - Diocese of Ndola
Radio Christian Voice	Maneki, Lusaka Province, but also broadcasting to other provinces.	Owned and managed by Christian Vision International,
Radio Maria	Chipata, Eastern Province	Diocese of Chipata and The World Family of Radio Maria, a non-governmental organization (NGO) which was legally established in 1998 .
Radio Chikuni	Chisekesi, Southern Province	The station broadcasts from Chisekesi on 91.8 FM and covers a radius of 60 kilometers. It also reaches four other towns- Monze, Mazabuka and Choma.
Mosi-o-Tunya	Livingstone, Southern Province	
Yatsani Radio	Lusaka, Lusaka Province	Broadcasts in English and local languages
Radio Solwezi	Solwezi, North Westen Province	
Radio Yangeni	Mansa, Luapula Province	
Radio Maranatha	Kabwe Central Province	Christian community radio station of the SDA Church
Radio Mazabuka	Mazabuka, Southern Province	Diocese of Livingstone
FCC Radio	Solwezi, North Westen Province	
Radio Liseli	Mongu, Western Province	Mongu Diocese - Missionary Oblates
Radio Yangeni	Mansa, Luapala Province	Archdiocese of Mansa

Commercial Stations

Station	Location
Radio Phoenix	Lusaka, Lusaka Province
Choice FM	Lusaka, Lusaka Province
Q FM	Lusaka, Lusaka Province
Breeze FM	Chipata, Eastern Province
Sky FM	Monze, Southern Province
5 FM	Lusaka, Lusaka Province
Zambezi FM	Livingstone, Southern Province
The Southern Guardian	Livingstone, Southern Province
Hot FM	Lusaka, Lusaka Province
Flava FM	No information available