



2. Face-To-Face Survey Overview Summary Results

A REPORT BY BALANCING ACT
August 2014

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Contents

A. Face-Face Survey Key Responses All Countries Summary	5
Methodology	14
B. Ghana Face-To-Face Survey Report	15
B1. Ghana Key Responses Summary	15
B2. Ghana Question-By-Question Breakdown of Results	17
C. Northern Nigeria Face-To-Face Survey Report	29
C1. Northern Nigeria Key Responses Summary	29
C2. Northern Nigeria Question-By-Question Breakdown of results	31
D. Senegal Face-To-Face Survey Report	43
D1. Senegal Key Responses Summary	43
D2. Senegal Question-By-Question Breakdown of Results	45
E. Tanzania Face-To-Face Survey Report	57
E1. Tanzania Key Responses Summary	57
E2. Tanzania Face-To-Face Survey report	59



A. Face-to-face Survey Key Responses All Countries Summary

Rationale for selection of countries: The face-to-face survey element had four parts: three countries (Ghana, Senegal and Tanzania) and a focus on part of a country, Northern Nigeria. All of the country samples were nationally representative and the Northern Nigeria sample is regionally representative. The countries have been chosen from a relatively small group of countries where media and technology changes have been most obvious over the last five years. The reason is that it will allow closer scrutiny of these changes. Other African countries will experience the same changes and the only difference will be the speed and extent of these changes.

Three of the surveys cover Anglophone countries (Ghana, Northern Nigeria, Tanzania) and the fourth is a francophone country (Senegal). These are the two of the main language groupings and therefore it might be useful to see whether this cultural difference had any impact on media and technology changes. Finally, the focus on Northern Nigeria was to see how the media landscape and communications worked in this huge but not often researched part of Nigeria.

1. Ownership of devices: the centrality of mobile; wider ownership of computers; and the arrival of tablets

Key Findings:

- Mobile ownership in all of the four surveys was around 90%, making the mobile phone the most widely owned device media device, both used as a media carrier (radio) and a media in its own right (Internet, SMS).
- Taking into account both sharing and owning, between a third and a half of those surveyed had access to some form of computer. Tablets are owned by around 5% of all those surveyed in Ghana and Tanzania.

1.1 Mobile ownership in all of the four surveys was around 90%, making the mobile phone the most widely owned device media device, both used as a media carrier (radio) and a media in its own right (Internet, SMS). Radios take second place (except in Northern Nigeria) and are almost as well owned in Senegal and Northern Nigeria but slightly less well owned in Ghana (84%) and Senegal (82%). TV ownership is much more variable with Ghana (76%) and Senegal (75%) highest and Northern Nigeria (62%) and Tanzania (52%) lowest. The fourth most owned device is usually an MP3 player but Tanzania is unusual in that 27% of respondents had a



2. Face-To-Face Survey Overview Summary Results

Pay TV service of some kind. All other devices are usually owned by around 20% or much less of the population.

1.2 Ownership of desktop computers and laptops is highest in Ghana (18% and 19% respectively) and Senegal (19% each) and lowest in Tanzania (3% and 6% respectively) and Northern Nigeria (6% each). Taking into account sharing, 37-50% have access to some type of computer in Ghana and Senegal and 14-16% in Tanzania and Northern Nigeria.

1.3 Ownership of Internet access varies between 15-21%: Ghana (21%); Northern Nigeria (20%); Senegal (17%); and Tanzania (15%). Taking into account those who share an Internet account, access is between 20-35%: Northern Nigeria (35%); Ghana (34%); Senegal (24%) and Tanzania (20%). The example of Ghana shows that Internet connection ownership is significantly higher amongst 18-24 year olds (28% as against 21% overall) and higher in urban than rural areas (25% in urban areas, 16% in rural areas against an overall average of 21%)

1.4 Tablets are a very recent phenomenon and ownership barely registers in Senegal and is non-existent in Northern Nigeria. However, Ghana (6%) and Tanzania (5%) respondents own a tablet of some form, which might also include “phablets” (large screen smartphones).

2. Getting News and Information - Dominated by radio and TV but both fragmented

Key Findings:

- Radio remains the dominant medium for obtaining news and information and only in Ghana (where electricity access is wider) does TV come close to the percentage of those listening to radio.
- In each of the countries examined, the media has been liberalized and the radio and TV audiences are fragmented so that only a relatively small number of players reach over 25% of the audience (see table below).
- In all four surveys, the state broadcaster has kept the most watched ever position through a combination of having a far greater broadcast transmission reach than private rivals and as the senior broadcaster, through sheer force of habit.

2.1 Radio remains the dominant medium for obtaining news and information: Tanzania (86%); Ghana (84%) and Northern Nigeria and Senegal (each 76%). With increased electricity access, television penetration comes close to radio in Ghana

2. Face-To-Face Survey Overview Summary Results

but is much less in the other three other surveys: Senegal (56%); Tanzania (55%) and Northern Nigeria (40%). Friends and family are also in the top three: Tanzania (81%); Northern Nigeria (67%); Senegal (66%) and Ghana (61%). However in order to be helpful to the survey respondent answering in this way, friends and family are most likely to be listening to radio or watching television.

2.2 Knowing that radio and TV are dominant media for getting news and information is not as helpful first might seem as the table summarizing these choices in each of the surveys shows. For in countries where media has been liberalized, there are considerable numbers of TV and radio stations:

Category/Country	Ghana	Northern Nigeria	Senegal	Tanzania
No of radio stations	49	62	46	26
Key players (Ever listened to by 25%+)	4	1	7	9
No of TV stations	8	30	17	19
Key players (Ever listened to by 25%+)	4	2	11	8

In each case, there are radio stations in different vernacular languages and in the case of Northern Nigeria in pidgin English. Also in Northern Nigeria, 30 of the radio stations are listened to by less than 3% of respondents and in the case of TV stations, 30 are watched by below 20% of respondents.

2.3 In all four surveys, the state broadcaster has kept the most watched position by percentage of viewers. This is probably through a combination of having a far greater broadcast transmission reach than private rivals and as the senior broadcaster, through sheer force of habit. For example, 97% of Senegalese respondents said they had Ever listened to state broadcaster RTS1.

3. Use of Mobile as Media - Radio, SMS, Internet and Social Media

Key findings:

- As the continent's most owned device, the mobile phone is used most regularly for: voice calls; radio; SMS; Internet and Social Media. Between a fifth and a third of all those surveyed used the Internet on a daily basis.
- The mobile phone is a radio for a large number of people as the phones have built in FM receivers that effectively provide a free-to-use service.
- Less than a fifth of all those surveyed used their phone for the following: Games, Apps, Photo/Video Clips, Live TV and You Tube. Use of these services is currently constrained by a combination of lack of data coverage, insufficient bandwidth and the high price of data. But as these factors change, so will the pattern of uses on Africa's mobile phones

3.1 With mobile as the most owned communications technology device on the continent, it is important to identify how it is used in different countries. There are five main uses (in declining order) on a more than once a day or once a day basis: voice calls; radio; SMS; Internet and Social Media. The daily frequency of use has been chosen as it represents a continuous rather an occasional pattern of behavior.

3.2 Although a majority of respondents choose voice calls, Ghana has a significantly lower amount of voice use: Tanzania (97%); Senegal and Northern Nigeria (92% respectively) and Ghana (88%). Since this question examines changes of patterns of behavior over 11 activities, it is hard to be conclusive about why this has happened. However, it is noticeable in Ghana that secondary activities like games and using photos and video clips are significantly more widely used, implying that there may be a trade-off happening here.

3.3 The mobile phone is a radio for a large number of people as the phones have built in FM receivers that effectively provide a free-to-use service:. Those listening to radio on their mobiles in this way in the different countries surveyed was as follows: Senegal (64%); Tanzania (62%); Ghana (53%); and Northern Nigeria (39%).

3.3 Outside of the above, SMS, Internet and Social Media are the main uses of the phone although by smaller numbers of respondents. Use of SMS varies considerably between the four surveys (in descending order): Tanzania (77%); Senegal (50%); Ghana (43%) and Northern Nigeria (36%). The equivalent 15+ literacy rates are: Tanzania (73%); Senegal (50%); Nigeria (61%); and Ghana (67%). The puzzle here is that for Tanzania and Senegal, SMS use almost matches levels of

2. Face-To-Face Survey Overview Summary Results

literacy but in Ghana and Northern Nigeria levels of SMS use are well below literacy levels. In the case of Northern Nigeria, this may well be because literacy levels are lower than the national average but in the case of Ghana, this disparity is harder to explain.

3.4 Daily use of the Internet on respondents mobile phones varied between just under 20% to almost 30% (in descending order): Ghana (28%); Tanzania (26%); Senegal (22%); and Northern Nigeria (17%). Social Media use is broadly similar. Although use levels are higher than this in urban areas and lower in rural areas, there are a growing number of people in rural areas using Internet on their mobile phones.

3.5 The other uses on the list of things a mobile phone was used for - Games, Apps, Photo/Video Clips, Live TV and You Tube - all attracted below 15-20% use by respondents. Live TV can be received on some mobile phones that have TV receivers built into them. 19% of Senegalese respondents watched live TV (as opposed to You Tube) on their mobile phone. You Tube use is 5% of respondents or below. Use of these services is currently constrained by a combination of lack of data coverage, insufficient bandwidth and the high price of data. But as these factors change, so will the pattern of uses on Africa's mobile phones. For example, You Tube is currently rated in the top 5 of all countries tracked by Alexa.com. With cheaper, faster bandwidth, national mobile habits are more likely to reflect this ranking.

4. Social Media and Social Engagement - Facebook use and posting on online forums

Key Findings:

- Between 14-27% of all those surveyed used social media and the dominant platform is Facebook.
- Various types of social engagement were listed and in the main these are minority activities. However, a significant minority of each country's survey respondents posted online opinions. The same is also true for blogging and each of the four countries surveyed has rich blogosphere.

4.1 The growth of Facebook has been phenomenal over the last four years: for example, in Nigeria user numbers have gone up 7 times. This growth in users is reflected in the survey samples. Looking at all respondents, those using it on a once a week or more basis were as follows (in descending order): Ghana (27%); Northern Nigeria (19%); Senegal (16%) and Tanzania (14%).



2. Face-To-Face Survey Overview Summary Results

4.2 Of those using social media, the dominant platform on a more than once a day basis is Facebook: Tanzania (56%); Senegal (42%); Ghana (37%); and Northern Nigeria (30%). Although the number of more than once a week users in Tanzania is lowest, those using Social Media there use three other platforms significantly: You Tube (28%); Google+ (26%); and Twitter (25%). Use of these latter three platforms is much lower in all the other three country surveys. None of the smaller social media platforms or international variants made any impact at all.

4.3 Various types of social engagement were listed and in the main these are minority activities. The most popular (on a once a week or more basis) was posting on an online forum but as a percentage of all respondents this is still relatively small scale: Northern Nigeria (14%); Ghana (9%); Tanzania (10%); and Senegal (5%). This implies that there are a considerable number of online opinion formers and influencers in the total populations of these countries.

4.4 The next most popular type of social engagement is writing a blog and given the commitment required to do this on a once a day or more than once a day basis as a percentage of all respondents making some form of social engagement, the numbers again belie the small percentages: Senegal (19%); Ghana (18%); Tanzania (17%); and Northern Nigeria (4%). All four countries sampled have lively blogospheres so the puzzle is why the number for Northern Nigeria is so low.

5. Trust in Media and Different Sources for Getting Health Information

Key findings:

- Radio and TV channels scored most highly in terms of those surveyed trusting the health information they heard on saw on them. The level of trust in these channels in Senegal was significantly lower than in the other countries.
- The levels of trust do not necessarily match up with whether people receive information from these sources or indeed make use of the information they obtain (see next section).

5.1 In each of the four samples, TV and radio scored the highest level of Trusted/Nearly Always Trusted, sometimes with TV on top and sometimes radio. The radio Trusted/Nearly always trusted scores were as follows: Northern Nigeria (88%); Tanzania (87%); Ghana (60%); and Senegal (48%). The TV Trusted/Nearly Always Trusted scores were as follows: Tanzania (86%); Northern Nigeria (84%); Ghana (65%); and Senegal (52%).



5.2 Overall levels of trust for any of the named sources was significantly lower in Senegal than in any of the other samples. The levels of trust do not necessarily match up with whether people receive information from these sources or indeed make use of the information they obtain (see below).

6. Receiving Health Information - Low responses for Diarrhoea and Polio, low receipt in Senegal

Key Findings:

- With the exception of Senegal, two-thirds to three-quarters of people received information on most of the health topics listed in the questionnaire.
- The health topics where there is consistently a shortfall in those receiving information is diarrhoea and polio across all four survey samples. However, there are specific problems with some topics: in Ghana with TB; in Northern Nigeria with TB, Family planning and diarrhoea.

6.1 With the exception of Senegal, two-thirds to three-quarters of people received information on most of the health topics listed on a less than a month or more recently basis: HIV/AIDS, Malaria, TB, Family Planning, Mother and Child Health, Health and Hygiene, Clean Water, Diarrhoea and Polio.

6.2 The country where less health information was received on these topics was Senegal where the respondents seemed to be receiving less information: at the top only 56% had received information on malaria less than a month or more recently basis whereas at the other end only 29% had received information on polio on the same basis.

6.3 The health topics where there is consistently a shortfall in those receiving information on the basis described above for diarrhoea and polio across all four country samples. However, there are specific problems with some topics: in Ghana (only 61% for TB) and in Northern Nigeria (TB and Family planning, (50% respectively), and diarrhoea (49%).

7. Using Health Information - Shortfalls vary by country, Senegal consistently low, radio and TV key sources for information used

Key Findings:

- Between two-thirds to three-quarters of all those surveyed used the health information provided on the topics listed in the questionnaire. Again the exception was Senegal where those surveyed both received less information and made less use of it.
- The least well used information was as follows: in Ghana, polio, Family Planning and TB; in Northern Nigeria, Family Planning, TB and diarrhoea; in Senegal, polio, diarrhoea and clean water; and in Tanzania, polio, diarrhoea and TB.
- In Ghana and Northern Nigeria, the top 5 sources for health information people used were: radio, TV, a doctor, family and a Government Official. In both Senegal and Tanzania, newspapers were used with the Government Official mentioned by far fewer people. Radio and TV are used by far more respondents than the other three sources.

7.1 With the exception of Senegal, two-thirds to three-quarters of people used information on most of the health topics listed on a less than a month or more recently basis: HIV/AIDS, Malaria, Mother and Child Health, Health and Hygiene, and Clean Water.

7.2 The country where less health information was received on these topics was Senegal where the respondents seemed to be receiving less information: at the top only 55% had used information on malaria less than a month or more recently basis whereas at the other end only 35% had received information on polio on the same basis.

7.3 There are shortfalls in information used and these varied by survey sample. In Ghana, it was polio (55%), Family Planning (65%) and TB (65%). In Northern Nigeria, it was family planning (42%), TB (50%) and diarrhoea (57%). In Senegal, it was polio (35%), diarrhoea (41%), and clean water (45%). In Tanzania, it was polio (50%), diarrhoea (56%) and TB (62%).

7.4 In Ghana and Northern Nigeria, the top 5 sources for health information people used were: radio, TV, a doctor, family and a Government Official. In both Senegal and Tanzania, the fifth position was for newspapers with the Government Official mentioned by far fewer people. Radio and TV are used by far more respondents than the other three sources.

8. Understanding Health Information

Key finding

- Those surveyed were asked to identify whether statements read out on health topics were true or false. In the main, the majority identified the false statements accurately but there is a worrying 20% who were unable to.

8.1 Respondents were asked whether various statements about the health issues (a total of 25 statements) in focus were either true or false. The false statements were based on common misconceptions about the health topic in question.

The purpose of this question was to try and explore the degree to which people actually understood the information they were given or whether they had not received information.

In the main, a majority of those surveyed chose the right answers when identifying the statements read out as either true or false. However, there was a significant minority of those surveyed who failed to identify the statements correctly.

The total number of questions where 20% or more of respondents got the wrong answer, the results were as follows: Senegal (13); Northern Nigeria (11); and Ghana and Tanzania (6 each). The most “false” answers were generated by statements about family planning.

Face-To-Face Survey Methodology

This quantitative part of the study, which was carried out by Research Solutions Africa, targeted the general population (national) aged 15+. A total of 1,000 respondents were interviewed in each of the countries namely; Tanzania, Senegal, Nigeria and Ghana. A random, multi-stage stratified sampling was utilized to distribute the sample in each country using Population Proportionate to Population size in each administrative level. Hence, with a sample of 1,000 the sample was distributed in proportion to the rural urban splits of 15+ year olds in each country. Based on the different census data, this split stands as (70:30 rural: urban - Tanzania, Ghana 50.9:49.1%, Senegal - 59:41) which means we have not over-sampled either rural or urban. This sample is therefore proportionate and self-weighting in relation to rural: urban splits.

Face-to-face interviewing was used in collecting the data. Respondents were randomly selected using a Kish grid in each household with more than one qualifying respondent. Households were randomly selected using date score and left hand rule. A semi-structured questionnaire was used to collect the data.

Country	Training- Quantitative	Pilot -Quantitative	Field work- Quantitative
Tanzania	29th July - 1st Aug 2013	1st - 2nd Aug 2013	3rd Aug - 7th of Sept 2013
Nigeria	17th-18th Sept 2013	18th-19th September	20th Sept - 5th Oct 2013
Ghana	27th-29th Sept 2013	29th September 2013	30th Sept -11th Oct 2013

B. Ghana Face-To-Face Survey Report

B1. Ghana Key Responses Summary

The survey had 1101 respondents and is nationally representative with sampling in all regions. The key responses from interviewees can be summarized as follows:

1. Mobile most widely owned, access to computers increasing: The most commonly owned devices are a mobile phone (88%), a radio (84%) and a TV (76%). The mobile is the most widely owned device and as the results below show it is both a media carrier (used for radio listening) and a media in its own right (for getting news and information). 72% of respondents will buy, hire or upgrade their mobile phone in the next 12 months: Overwhelmingly, the majority wants smartphone features like Internet and a touch screen. In terms of computer ownership, 19% own a laptop; 18% a desktop computer and 6% a tablet. 21% have an internet connection although access varies within the country with internet connection ownership much lower in Central Region, Upper Eastern, Upper West and Western.

2. Getting News and Information - Radio, TV and Friends and Family: Radio (84%), TV (79%) and Friends and Family (61%) dominate the getting of news by respondents. Social Media (21%) and Internet (20%) have grown over the last three years and will continue to grow. Internet is more likely to be used by 18-24 year olds (28%) and the feature phone user research confirms that Internet is nearly as likely to be used as TV and radio by the younger demographic. Men are marginally more likely to use the Internet than women to get news: 22% against 17%.

3. Use of Mobile as Media - Listening to radio and getting news and information: 53% of respondents used their mobile phone (with a receiver) to listen to radio and 28% to access the Internet. Of those using the mobile to access the Internet, 35% used it to follow the news; 26% to get home information; and 35% to get work information. Similar proportions used social media to get these three things. Of the 66% using SMS for these tasks, 76% followed news headlines; 70% got home information; and 70% work information. 38.6% considered Internet either Most Important or Important on their mobile phone and 29.3% considered Social Media most important or Important. 17.7% of the respondents had used NGO websites anything between more than once a day to less frequently.



4. A fifth of all surveyed used social media: 21.7% of all respondents either use Facebook more than once a day or on a daily basis: this proportion is likely to grow as Internet use grows. A significant number of respondents are using Facebook via SMS which demonstrates the attractions of this social media platform, particularly to younger users. 26.8% of respondents had posted a comment on an online forum but other forms of social engagement were much less well used.

5. Getting Health Information - Television and radio dominate: TV and radio were by far the most trusted media for getting health information: radio is marginally less trusted than television. They were also the most used media for getting information by respondents on these health issues and thus might be described as primary information sources. Secondary information sources include doctor (39-45%), family (30-37%), Internet (10-15%) and a traditional healer (5-10%).

6. Gaps in receiving Health Information - Five missing areas: Over 70% had received health information on the listed issues except for tuberculosis; family planning; mother and child health; diarrhoea; and polio. The latter was the one on which least information was received by respondents in the last 12 months.

7. Using Health Information - Again five missing areas: Over 70% had used health information from the listed issues except for tuberculosis; family planning; mother and child health; diarrhoea; polio. The latter was the one on which least information was used.

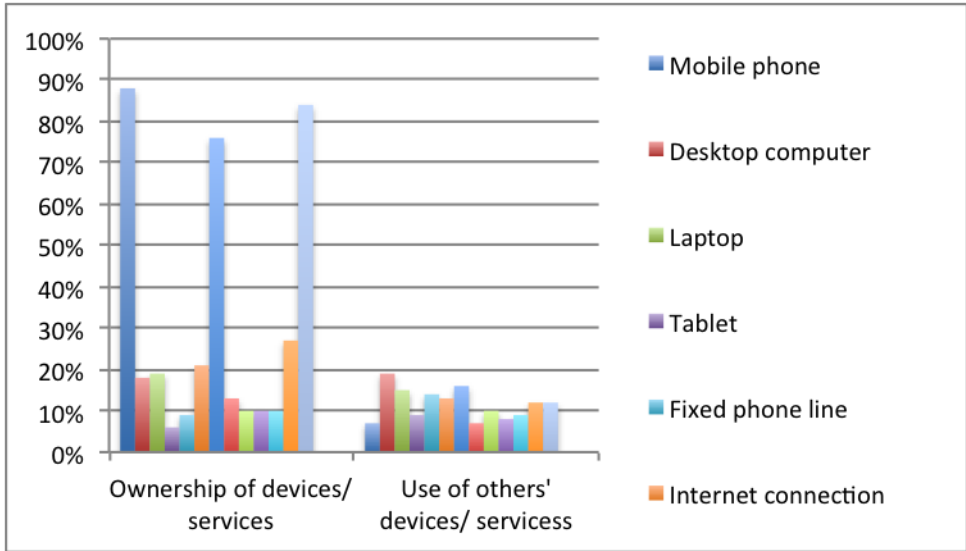
8. Understanding Health Information - 10-30% gave wrong answers: Respondents were asked whether various statements about the health issues in focus were either true or false. The good news is that the overwhelming majority got the correct answers. The bad news is that for some statements between 10-30% of respondents gave the wrong answers.

B2. Ghana Question-by-Question Breakdown of Results

1. Which of the following do you own, or do you use anyone else's? mobile phone, desktop computer laptop, tablet, fixed phone line, internet connection, TV, pay TV service, PVR, set top box, satellite dish, MP3 player, radio

Q 1.1 Ghanaian respondents were most likely to own a mobile phone (88%), radio (84%), TV (76%) and MP3 player (although at 27% considerably fewer owned these). 18% owned a desktop computer, 19% a laptop computer and 6% a tablet. Getting access to somebody else's device means access to desktop computers (19% share), laptops (15% share) and tablets (9% share) are actually higher. So the percentage either owning or sharing taken together is as follows: desktop computer (37%), laptop (34%) and tablet (15%). 21% owned their own Internet connection and 13% had access to someone else's.

There are marked geographic variations for computer ownership: For example, in the Central Region only 9% own a desktop computer and in Western region only 3% owned a laptop. As would be expected, there are higher levels of say laptop ownership in Greater Accra than the overall average: 27% as against 19%. In terms of Internet connection, ownership was significantly lower in Upper Eastern, Upper West and Western.



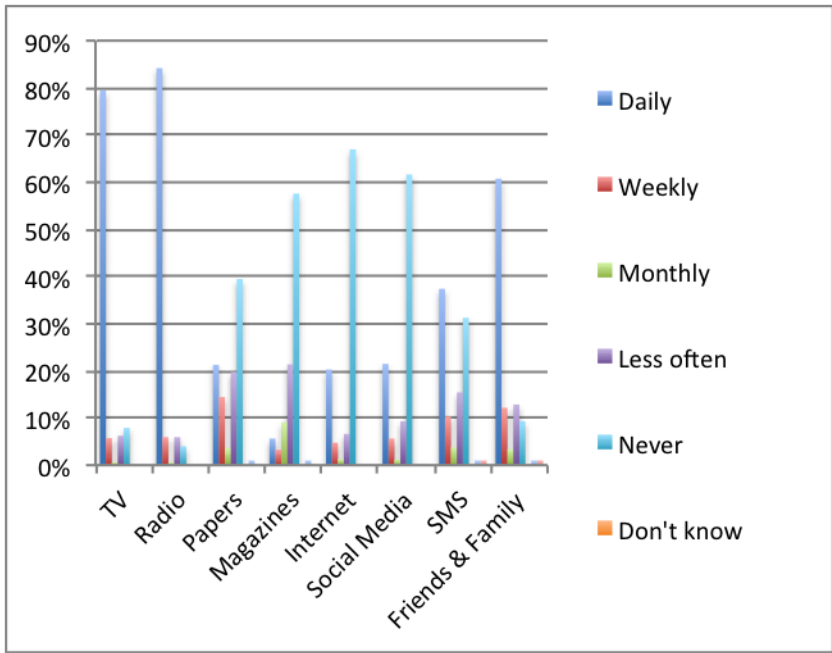
2. How frequently do you use the following to get news and information? TV, radio, papers, magazine, internet, social media, SMS, friends & family to get news and information

Q1.2 On a daily basis, Ghanaian respondents were most likely to get news and information from the following sources: radio (84%), TV (79%) and friends & family (61%). However, both Internet (20%) and Social Media (21%) have increased significantly in importance over the last five years (see qualitative survey

2. Face-To-Face Survey Overview Summary Results

interviewees). The flip-side of this particular finding is that 67% had never used the Internet for news and information and 62% had never used Social Media.

18-24 year olds are significantly more likely to use the Internet in this way (28%) and Internet use for this reason declines with age. As you would expect, the Internet is less well used in rural areas (16%) as against urban areas (25%) but the percentage in rural areas is now significant. Men are marginally more likely to use the Internet than women: 22% to 17%.



3. Do you ever listen to (radio station)?

Q1.3A 39 radio stations were listed and although this was a long list, 16% said they listened to other radio stations. Some of the radio stations were regional or local and therefore do not score well on a national sample. The key players were as shown below but daily listenership - except for the top two stations - is significantly lower than the overall number who ever listened to them:

	Ever	Of ever, listening daily
Joy FM	49%	47%
Adom FM	38%	38%
Unique FM	37%	17%
GBC1	32%	32%
Gold FM	23%	23%
GBC2	22%	21%

Percentages in the second column have been rounded up.

2. Face-To-Face Survey Overview Summary Results

The other 43 stations each got below 20% and this illustrates the level of fragmentation of radio audiences in markets where radio licences have been liberalised.

Q1.3B In terms of TV stations, there are four main players as shown in the table below. The TV market is less fragmented than the radio market and as a result audiences have greater levels of loyalty to a station, particularly to the Government broadcaster GBC. There is almost no geographic variation in the reach of this channel except those responding ever watched drops to 89% in Western.

	Ever	Of ever, watching daily
GTV	97%	75%
GTV News	84%	57%
TV3	82%	57%
Metro TV	77%	47%

All other TV stations listed had audiences below 10% except for Multichoice/DStv (17%).

Q1.3C The percentage who have ever read newspapers is far less than radio is listened to or TV watched. Four newspapers stand out and the Daily Graphic stands out well ahead of all of them:

	Ever
Daily Graphic	59%
Accra Daily Mail	27%
Ghanaian Times	26%
The Mirror	22%

4. How frequently do you use your mobile phone for the following? voice calls, internet, apps, social media, SMS, photo/video clips, games, radio, watch live TV and watch videos on YouTube

Q 2.1 Ghanaian respondents' *once a day* use of their mobiles was as follows: voice calls (88%); radio (53%); SMS (43%); Internet (28%); Social Media (25%); Games (18%); Apps (15%); Photo/video clip (15%); live TV (7%) and You Tube (3%). A very high proportion of mobile users listen to radio using a receiver in their mobile phone.

2. Face-To-Face Survey Overview Summary Results

4a. What do you use each of the following mobile phone features for?

- voice calls, internet, apps, social media, SMS, photo/video clips, games, radio, watch live TV and watch videos on YouTube
- keeping in touch with friends & family, following the news, to get specific information for work, to get specific information for home, for fun & entertainment, for the purposes of worship.

Q 2.2A The Ghanaian respondents used their mobile phone for the following things:

	Voice	Internet	Apps	Social Media	SMS	Photo/ Video	Games
In touch with friends and family	98%	58%	33%	65%	79%	15%	95%
Getting home information	37%	26%	13%	25%	30%	5%	5%
Getting work information	34%	35%	20%	26%	30%	6%	4%
Fun and entertainment	25%	45%	50%	47%	23%	76%	83%
Worship	14%	0%	6%	15%	10%	3%	3%
Following news	20%	14%	20%	27%	24%	9%	4%

Respondents were also asked similar questions about listening to radio or watching live TV on their mobile. In terms of radio on their mobile, 73% used it for getting news; and 23% each for getting information for the home or work. In terms of watching live TV on their mobile, 38% used it for getting news; 17% for getting information for the home and 13% for getting information for work. In terms of You Tube on their mobile, 16% used it for news, 12% for getting information for the home and 10% for getting information for work.

4b. On a scale of 1-3 (where 1 means most important and 3 least important) how important are each of these?

Q2.2B Respondents using each of these features were asked to rate in terms of importance the things described in the previous question. The table below shows those things listed as most important by those using them:

2. Face-To-Face Survey Overview Summary Results

Most Important on mobile phone	
Voice Calls	86%
Internet	57%
Radio	55%
SMS	44%
Live TV	42%
Apps	40%
Social Media	39%
Games	39%
Photo/video clip	38%
You Tube	31%

5. How frequently do you use these following social media: Facebook, Twitter, YouTube, MXit, 2go, Eskimi, biNu, Google+?

Q 2.3.1 27% of all respondents had used Facebook (more than once a week) with other social media being far less well used. The table below shows the platforms used by social media respondents on a more than once a day or daily basis, with Facebook dominating the field:

	More than once a day	Once a day
Facebook	37%	18%
Google+	12%	6%
Twitter	7%	20%
You Tube	5%	11%
Eskimi	4%	1%
MXit	2%	3%
2Go	2%	3%
biNu	1%	2%

Based on 394 respondents

2. Face-To-Face Survey Overview Summary Results

6a. Which of the following SMS services do you use? local news headlines, international news headlines, educational services, sports information, SMS messages on Facebook, Music services, Google SMS chat and M-money services

Q2.4a&b SMS messaging is used by relatively large numbers of mobile phone owners for a wide range of services. However, those using more than once a day or daily are much smaller percentage:

	Use	1+ a day	Once a day
Local News	68%	23%	25%
International News	49%	17%	24%
Education Services	33%	16%	29%
Sports Info	31%	23%	25%
SMS/Facebook	30%	26%	32%
Google SMS chat	20%	21%	22%
Music Services	16%	12%	18%
M-Money	11%	14%	15%

6b. How frequently do you use the following services on internet? Local news websites, international news websites, information from NGO websites, sports information, internet radio, sports websites, YouTube

Q2.5A&B Ghanaian respondents were asked how frequently they used different types of services on the Internet:

	1+ a day	Once a day	Weekly
Local News	15%	23%	15%
International News	15%	18%	13%
Internet Radio	12%	7%	6%
Sports websites	11%	9%	41%
NGO Websites	6%	6%	2%
You Tube	5%	8%	10%

6c. Comparing SMS and Internet usage

SMS provides information that is extremely limited and is most effective with things like news headlines. Using Facebook and Google SMS Chat are hybrid uses that allow those with basic phones to get involved in social media and the former is well used. The Internet is used by less people but is able to provide both text and pictures. Regular Internet users of the things outlined in Q2.5A above are only a relatively small segment of overall Internet users.

7. How frequently have you written a blog, posted a comment on an online forum, posted a photo to a sharing site, made a video and posted it onto a sharing site, makes a conference call on Skype; got news from an RSS feed and connected with work colleagues on LinkedIn?

Q2.5B This question was asked of respondents to try and identify the degree to which they were actively posting or using social media in some way. Posting comments on a forum was the most used of these social media activities but overall being actively involved in self-generating content is still a minority activity:

	1+ a day	Once a day	Weekly
Posted on a Forum	19%	24%	13%
Written a blog	11%	7%	10%
Posted a photo	9%	11%	7%
Posted a video	9%	5%	5%
Conf call on Skype	5%	6%	7%
Connected on LinkedIn	5%	6%	3%
News from RSS feed	4%	4%	2%

Based on 342 respondents.

8. Will you buy, hire or upgrade (the named piece of equipment) in the next 12 months?

Q3.1 The majority of respondents will be upgrading their mobile phone or TV in the next 12 months but also significant numbers of respondents will be upgrading their laptop and getting a better/faster Internet connection.

Will buy, hire or upgrade in the next 12 months	
Mobile	72%
TV	50%
Radio	49%
Better Internet	41%

2. Face-To-Face Survey Overview Summary Results

Laptop	41%
Desktop computer	33%
Tablet	29%
Digital Set Top Box	29%
Pay TV	27%
PVR	26%

Q3.2 Respondents were asked what kind of phone they could afford to change to and were offered different functionalities. The ability to play music and access the Internet were the two most favoured things for a new mobile to do but all of the things offered scored highly.

Afford to change to a phone that:	
Can play music on	90%
Can access the Internet	89%
Play videos on	86%
Has a touch screen	83%
Can download apps	77%

9. Exploring issues of trust with different media

Q4.1 How much do you trust news from (media or source named)?

Ghanaian respondents were most likely to trust news from television ahead of radio but all other sources were always trusted or nearly always trusted by around a quarter or respondents or less.

2. Face-To-Face Survey Overview Summary Results

	Always Trust	Nearly Always Trust
TV	52%	13%
Radio	44%	16%
Friends and Family	35%	22%
Other people in community	26%	20%
Posters or Billboards	25%	14%
SMS	21%	12%
Newspapers	20%	17%
Brochures & Pamphlets	20%	13%
Government Officials	17%	12%
Internet	16%	12%
Social Media	14%	10%
Magazines	13%	13%

10a. When was the last time you received information about the following? HIV/ AIDS, Malaria, TB, family planning, mother & child health, health & hygiene, clean household water, Diarrhoea and Polio

Q5.1 A quarter to a third of respondents said they had received information on these health issues on the day of the survey. Issues less frequently named were diarrhoea, family planning, TB and polio. This conclusion is also reflected in the qualitative part of the research. Fewer than 10% had *never* received information about any of these issues.

Seen information	Today	Less than one week	Less than a month
HIV/AIDS	25%	26%	22%
Malaria	25%	26%	22%
TB	14%	20%	27%
Family Planning	18%	19%	27%
Mother & Child Health	21%	18%	26%
Health & Hygiene	29%	21%	22%
Clean Water	33%	22%	19%
Diarrhoea	19%	19%	25%
Polio	11%	16%	28%

2. Face-To-Face Survey Overview Summary Results

9b. When was the last time you made use of information you received about the following? HIV/AIDS, Malaria, TB, family planning, mother & child health, health & hygiene, clean household water, Diarrhoea and Polio

Q 5.2 The information most likely to be acted upon by respondents today was about clean water, health and hygiene and malaria. In part this is because these issues are probably perceived to affect everybody but also because some issues will only affect particular groups of people. 28% had not used information about Polio for a long time. As many as 16% had never made use of information about either Polio or family planning

Used information	Today	Less than one week	Less than a month
HIV/AIDS	24%	26%	20%
Malaria	34%	26%	16%
TB	23%	23%	19%
Family Planning	24%	21%	20%
Mother & Child Health	28%	20%	19%
Health & Hygiene	43%	20%	14%
Clean Water	47%	20%	11%
Diahorrea	28%	21%	18%
Polio	16%	19%	20%

10. Where did you get the information that you made use of for the following health areas? HIV/AIDS, Malaria, TB, family planning, mother & child health, health & hygiene, clean household water, Diarrhoea and Polio

Q 5.3 Where respondents said they got information from is remarkably consistent with some relatively small variations with the exception of polio. TV and radio are consistently most widely used and might well be termed primary sources but obviously a complete picture emerges from several other secondary sources. Paper leaflets are not widely used by the respondents. The minority who say they go to traditional healers for information are more likely to go for HIV/AIDS and malaria than for other health issues listed below. The code for particular columns can be found at the bottom of the table.

2. Face-To-Face Survey Overview Summary Results

Received info from	HIV/ AIDS	Malaria	TB	FP*	MCH**	HH***	CW****	Diahorrea	Polio
TV	85%	78%	74%	79%	79%	79%	77%	72%	69%
Radio	85%	80%	79%	83%	79%	80%	76%	77%	72%
Doctor	45%	41%	39%	43%	42%	40%	36%	37%	35%
Family	37%	33%	30%	33%	32%	32%	32%	30%	26%
Govt Official	31%	28%	27%	29%	31%	28%	28%	26%	24%
Cty Elders	24%	17%	17%	19%	21%	24%	21%	18%	13%
Newspapers	23%	19%	19%	22%	20%	20%	19%	17%	18%
SMS	18%	17%	16%	17%	16%	16%	15%	15%	15%
Work or school	17%	13%	13%	16%	16%	15%	15%	13%	11%
Internet	15%	12%	14%	14%	14%	14%	13%	13%	10%
Traditional healer	10%	8%	7%	7%	7%	6%	6%	5%	5%
Paper leaflets	8%	5%	6%	6%	5%	6%	6%	7%	5%
Magazines	8%	5%	6%	8%	8%	7%	6%	6%	5%

* = Family Planning

** = Mother & Child's Health

***= Health and Hygiene

**** = Clean Water

11. Please tell me whether the following statements are true (T) or false (F).

Q6.1 The responses to this question contain both good and bad news. The good news is that the overwhelming majority of respondents were able to separate the True and False statements. The bad news is that between 10-30% gave the wrong answers. Malaria messages seem to have been understood best whereas those for family planning and TB are less well understood.

2. Face-To-Face Survey Overview Summary Results

	True	False
Catch HIV/AIDS from toilet seat or door knob (F)	9%	91%
Treated bed nets protect from malaria (T)	96%	4%
The symptoms of malaria (T)	96%	4%
Need to be tested by doctor to see if you have HIV/AIDS (T)	94%	6%
Family planning methods do not cause cancer (T)	79%	21%
Get HIV/AIDS from mosquito bites (F)	14%	86%
Contraceptive injections mean never have babies again (F)	27%	73%
Malaria passed on by mosquito bites (T)	89%	11%
One of my parents had TB, I'm likely to get it (F)	32%	68%
In touch with someone who has TB for many hours to catch	76%	24%
Mothers taking pill may give birth to deformed babies	25%	75%
HIV/AIDS caused by exchange of bodily fluids (T)	87%	13%
Malaria caught from certain types of ants (F)	11%	89%
You should stop taking TB medicine when symptoms get better (F)	19%	81%
Medicines that can cure HIV/AIDS completely (F)	18%	82%
Those with weakened immune systems more likely to develop TB (T)	83%	17%
The Symptoms of TB (T)	88%	12%
Malaria cannot be cured in this country (F)	16%	84%
Get malaria from working in the fields (F)	17%	83%
Birth control pills will lead to very bad health problems (F)	31%	69%
Contraception can be good for a womens health (T)	79%	21%
Wash hands after wiping child's bottom (T)	91%	9%
Condoms prevent STIs like HIV (T)	88%	12%
Washing hands kills all harmful germs	47%	53%
Bad hygiene leads to diahorrea in children which may cause them to die (T)	86%	14%

C. Northern Nigeria Face-To-Face Survey Report

C.1 Nigeria Key Responses Summary

The survey had 512 respondents and is representative of Northern Nigeria with sampling in all regions. The key responses from interviewees can be summarized as follows:

1. Radio and mobile most widely owned, low level of computer ownership:

Northern Nigerian respondents were most likely to own a radio (89%), a mobile phone (87%), TV (62%) and MP3 player (although at 30% considerably fewer owned these). Only 6% owned a desktop computer, 6% a laptop computer and no-one owned a tablet. Getting access to somebody else's device means access means computer access overall is slightly higher with desktop computers (9% share), and laptops (7% share). So the percentage either owning or sharing taken together is as follows: desktop computer (15%) and laptop (13%). 20% owned their own Internet connection and 15% had access to someone else's. Less than 20% had access to the other devices identified.

2. Getting News and Information - Radio and TV dominate as media: TV is far less important in Northern Nigerian than in Ghana. On a daily basis, Northern Nigerian respondents were most likely to get news and information from the following sources: radio (76%), friends & family (67%) and TV (40%). However, SMS (30%), Social Media (15%) and Internet (13%) are all important secondary sources. Newspapers are only read by a very small number of respondents (4%).

3. Use of Mobile Top 3 - Voice, Radio and SMS: Northern Nigerian respondents' once a day use of their mobiles was as follows: voice calls (92%); radio (39%); SMS (36%); Social Media (21%); Internet (17%); Games (14%); Apps (9%); Photo/video clip (9%); live TV (5%) and You Tube (1%). A very high proportion of mobile users listen to radio using a receiver in their mobile phone.

4. Nearly a fifth of those surveyed use social media: 18% of all respondents either use Facebook more than once a day or on a daily basis: this proportion is likely to grow as Internet use grows. A significant number of respondents are using Facebook via SMS which demonstrates the attractions of this social media platform, particularly to younger users. On a daily basis, Social Media use is evenly spread between Facebook (30%) and South African mobile social platform 2Go (33%). 29% of respondents had posted a comment on an online forum.



5. Getting Health Information TV and Radio most trusted: TV and radio were by far the most trusted media for getting health information: TV is marginally less trusted (51%) than radio (60%). All other sources were below 25% or lower on an always trust basis, much lower than for the Ghanaian respondents.

6. Receiving Health Information - lower levels than Ghana: Between 50-60% had received health information on the listed issues, much lower than the 70% of respondents in Ghana. In terms of never receiving information, the results were as follows: TB (19%); diarrhoea (18%); family planning (17%) and mother and child health (15%).

7. Using Health Information: Only malaria information was used by above 70% of respondents (72%). The Never Used responses were all around 10%.

8. Understanding Health Information - Most wrong answers on family planning and TB: Respondents were asked whether various statements about the health issues in focus were either true or false. Respondents were significantly more likely to these answers wrong, particularly for questions on family planning and tuberculosis.

C2. Northern Nigeria Question-by Question Breakdown of Results

1. Which of the following do you own, or do you use anyone else’s? mobile phone, desktop computer laptop, tablet, fixed phone line, internet connection, TV, pay TV service, PVR, set top box, satellite dish, MP3 player, radio

Q 1.1 Northern Nigerian respondents were most likely to own a radio (89%), a mobile phone (87%), TV (62%) and MP3 player (although at 30% considerably fewer owned these). Only 6% owned a desktop computer, 6% a laptop computer and no-one owned a tablet. Getting access to somebody else’s device means access means computer access overall is slightly higher with desktop computers (9% share), and laptops (7% share). So the percentage either owning or sharing taken together is as follows: desktop computer (15%) and laptop (13%). 20% owned their own Internet connection and 15% had access to someone else’s. Less than 20% had access to the other devices identified.

2. How frequently do you use the following to get news and information? TV, radio, papers, magazine, internet, social media, SMS, friends & family to get news and information

Q 1.2 TV is far less important in Northern Nigerian than in Ghana. On a daily basis, Northern Nigerian respondents were most likely to get news and information from the following sources: radio (76%), friends & family (67%) and TV (40%). However, SMS (30%), Social Media (15%) and Internet (13%) are all important secondary sources. Newspapers are only read by a very small number of respondents (4%)

3. Do you ever listen to (radio station)?

Q1.3A Radio listening in Northern Nigeria is very localised and highly fragmented. 62 radio stations were listed in the questionnaire and just under half (30) were ever listened to by above 3% of respondents. The number of respondents answering the question about frequency of listening was too small in each case to be reliable.

	Ever
Freedom Radio, Kano	25%
Pyramid FM, Madobi	19%
Wazobia Farm Centre, Kano	17%
MW Nagarta Radio	14%
Supreme FM, Kaduna	11%
Karama FM, Kaduna	10%
Raypower FM, Abuja	10%



2. Face-To-Face Survey Overview Summary Results

Alheri Radio FM, Kaduna	9%
Aso Radio Abuja	9%
Brila FM Abuja Sports	9%
Capital Sounds, Kaduna	9%
Liberty Radio FM, Kaduna	9%
Rhythm FM, Abuja	9%
Wazobia FM, Abuja	9%
Cool FM, Abuja	8%
Hot FM, Abuja	8%
Kada FM, Kaduna	8%
Kapital FM Abuja	8%
Joy FM, Otukpo	6%
Rhythm FM, Jos	6%
Vision FM Abuja	6%
Confluent FM, Lukoja	5%
GBC, Yola Yola	5%
Highland FM, Jos	5%
Lighthouse FM, Yola	5%
Peace FM, Jos	5%
Gotel FM, Yola	4%
Harvest FM, Makurdi	4%
Kiss FM, Abuja	4%
Love FM, Abuja	4%
Radio 2, Bauchi	4%
Craig FM	3%

2. Face-To-Face Survey Overview Summary Results

Q1.3B Have you ever watched (TV station)?

TV watching in Northern Nigeria is less localised and less fragmented than radio but only two stations have an extensive reach: the Federal Government broadcaster NTA and private broadcaster AIT. 30 TV stations were listed in the questionnaire and only (30) were ever watched by above 10% of respondents. The number of respondents answering the question about frequency of watching was too small in each case to be reliable.

	Ever
NTA	95%
AIT	39%
ARTV Kano	10%
KSTV Kano	10%
STV	10%

1.3.C The questionnaire listed 48 newspapers (online and offline), only 11 of which have ever been read by above 5% of the respondents, the largest being the Nigerian Vanguard. Channels TV is news channel in Nigeria and it is the most read online website with 2.3% of respondents having ever used it. The sample numbers are too small to comment on frequency of reading.

	Ever
Nigerian Vanguard	19%
Punch	18%
Sun	18%
Guardian	17%
Trust	16%
This Day	14%
Complete Sports	11%
Leadership	9%
Independent	8%
Nation	5%
National Mirror	5%
Nigerian Tribune	5%

2. Face-To-Face Survey Overview Summary Results

How frequently do you use your mobile phone for the following? voice calls, internet, apps, social media, SMS, photo/video clips, games, radio, watch live TV and watch videos on YouTube

Q 2.1 Northern Nigerian respondents' *once a day* use of their mobiles was as follows: voice calls (92%); radio (39%); SMS (36%); Social Media (21%); Internet (17%); Games (14%); Apps (9%); Photo/video clip (9%); live TV (5%) and You Tube (1%). A very high proportion of mobile users listen to radio using a receiver in their mobile phone.

4a. What do you use each of the following mobile phone features for?

- voice calls, internet, apps, social media, SMS, photo/video clips, games, radio, watch live TV and watch videos on YouTube
- keeping in touch with friends & family, following the news, to get specific information for work, to get specific information for home, for fun & entertainment, for the purposes of worship.

Q 2.2A The Northern Nigerian respondents used their mobile phone for the following things. Nearly two-thirds of respondents used the Internet to follow the news.

	Voice	Internet	Apps	Social Media	SMS	Photo/ Video	Games
In touch with friends and family	97%	34%	13%	59%	79%	4%	3%
Getting home information	28%	19%	10%	32%	18%	3%	4%
Getting work information	19%	24%	17%	17%	12%	2%	9%
Following news	9%	59%	11%	27%	10%	1%	6%
Fun and entertainment	4%	38%	59%	47%	9%	80%	77%
Worship	3%	6%	4%	4%	3%	10%	4%

Base respondents: Voice (435); Internet (178); Apps (124); Social Media (176); SMS (337); Photo/ Video (198); and games (249).

2. Face-To-Face Survey Overview Summary Results

4b. On a scale of 1-3 (where 1 means most important and 3 least important) how important are each of these?

Q2.2B Respondents were asked to rate in terms of importance the things described in the previous question. The table below shows those things listed as most important:

Most Important on mobile phone	
Voice Calls	83%
Internet	53%
Radio	44%
Live TV	37%
Social Media	32%
SMS	32%
Apps	23%
Photo/video clip	15%
Games	14%
You Tube	14%

Same base respondents as previous table.

6. How frequently do you use these following social media: Facebook, Twitter, YouTube, MXit, 2go, Eskimi, biNu, Google+?

Q 2.3.1 19% of all respondents had used Facebook (more than once a week) with other social media being far less well used. The table below shows the social media used by respondents on a more than once a day or daily basis, with Facebook and 2Go dominating the field followed by Google+. Other social media platforms were barely used by respondents:

	More than once a day	Once a day
Facebook	30%	23%
2Go	33%	11%
Google+	15%	12%
Eskimi	2%	2%
Twitter	1%	2%
MXit	1%	6%
biNu	1%	1%
You Tube	0%	1%

Based on 176 respondents

2. Face-To-Face Survey Overview Summary Results

6a. Which of the following SMS services do you use? local news headlines, international news headlines, educational services, sports information, SMS messages on Facebook, Music services, Google SMS chat and M-money services

Q2.4A&B Which do you use and how frequently do you use each of them?

With the exception of Facebook, all of these things were more likely to be used once a day than more than once a day by users at this level of use.

	Use	1+ a day	Once a day
SMS/Facebook	35%	24%	21%
Sports Info	34%	12%	29%
Local News	33%	26%	34%
International News	24%	28%	12%
Education Services	24%	13%	9%
Google SMS chat	15%	12%	18%
Music Services	7%	12%	18%
M-Money	7%	9%	30%

Base respondents: Use: 337;

6b. How frequently do you use the following services on internet? Local news websites, international news websites, information from NGO websites, sports information, internet radio, sports websites, YouTube

Q2.5A&B Northern Nigerian respondents were asked how frequently they used different types of services on the Internet. As with the basic phone uses above, Internet respondents are not frequent users of the items below:

	1+ a day	Once a day	Weekly
Sports websites	5%	12%	25%
International News	4%	12%	18%
NGO Websites	1%	2%	5%
Local News	3%	16%	24%
Internet Radio	0%	10%	4%
You Tube	0%	1%	2%

Base respondents: Internet 179

6c. Comparing SMS and Internet usage

SMS provides information that is extremely limited and is most effective with things like news headlines. Using Facebook and Google SMS Chat are hybrid uses that allow those with basic phones to get involved in social media and the former is well used. The Internet is used by less people but is able to provide both text and pictures. Regular Internet users of the things outlined in Q2.5A above are only a relatively small segment of overall Internet users. Respondents were more than twice as likely to access sports information and international news via SMS rather than the internet, and more than 10 times more likely to use SMS educational services than to use NGO websites.

7. How frequently have you written a blog, posted a comment on an online forum, posted a photo to a sharing site, made a video and posted it onto a sharing site, makes a conference call on Skype; got news from an RSS feed and connected with work colleagues on LinkedIn?

Q2.5B This question was asked of respondents to try and identify the degree to which they were actively posting or using social media in some way. All of the social engagement activities are at a far lower level than for example, in Ghana:

	1+ a day	Once a day	Weekly
Posted on a Forum	7%	10%	12%
Written a blog	2%	2%	8%
Posted a photo	2%	6%	9%
Posted a video	1%	0%	2%
Conf call on Skype	1%	5%	9%
Connected on LinkedIn	0%	4%	2%
News from RSS feed	0%	1%	1%

Based on 179 respondents.

Of those using the internet, the majority of Northern Nigerian respondents had never knowingly participated in most of the online activities identified: 94% had never knowingly got news feeds on RSS; 93% had never knowing posted a video; 85% had never knowingly connected with work colleagues on LinkedIn; 80% never knowingly been in a conference call on Skype; 74% had never knowingly written a blog and 66% never knowingly posted a photo.

They were most likely to have posted comments. Indeed 17% did so at least once a day.

2. Face-To-Face Survey Overview Summary Results

8. Will you buy, hire or upgrade (the named piece of equipment) in the next 12 months?

Q3.1 The majority of respondents will be upgrading their mobile phone or TV in the next 12 months but also significant numbers of respondents will be upgrading their laptop and getting a better/faster Internet connection. The numbers wishing to upgrade is slightly lower than for the Ghanaian respondents.

Will buy, hire or upgrade in the next 12 months	
Mobile	78%
Radio	55%
TV	45%
Better Internet	37%
Laptop	30%
Tablet	29%
Digital Set Top Box	29%
Desktop computer	18%
Pay TV	18%
PVR	14%

Base respondents: All

Q3.2 Respondents were asked what kind of phone they could afford to change to and were offered different functionalities. The ability to play music and videos and access the Internet were the three most favoured things for a new mobile to do.

Afford to change to a phone that:	
Can play music on	89%
Play videos on	84%
Can access the Internet	77%
Has a touch screen	62%
Can download apps	64%

Base respondents: All

9. Exploring issues of trust with different media

Q4.1 How much do you trust news from (media or source named)?

Northern Nigerian respondents were most likely to trust news from radio ahead of television but all other sources were always trusted or nearly always trusted by around a quarter or respondents or less with the exception of friends and family.

	Always Trust	Nearly Always Trust
Radio	60%	28%
TV	51%	33%
Friends and Family	40%	42%
Posters or Billboards	23%	33%
SMS	21%	12%
Internet	18%	31%
Newspapers	18%	28%
Other people in community	17%	53%
Government Officials	15%	35%
Social Media	15%	26%
Brochures & Pamphlets	13%	33%
Magazines	11%	24%

Base respondents: All

10a. When was the last time you received information about the following? HIV/AIDS, Malaria, TB, family planning, mother & child health, health & hygiene, clean household water, Diarrhoea and Polio

Q5.1 A far lower proportion of the respondents had seen information on the day they were interviewed than in Ghana and for example, only 49% had seen information on diarrhoea in less than a month, a week or today. More worryingly, four health issues had significant numbers who had never received information about them: TB (19%); diarrhoea (18%); family planning (17%); and mother and child's health (15%).

2. Face-To-Face Survey Overview Summary Results

Seen information	Today	Less than one week	Less than a month
Malaria	9%	36%	31%
Health & Hygiene	9%	24%	31%
Clean Water	9%	26%	25%
Mother & Child Health	7%	23%	27%
Polio	7%	33%	33%
HIV/AIDS	3%	30%	35%
TB	2%	20%	28%
Family Planning	2%	20%	28%
Diahorrea	2%	18%	29%

Base: All respondents

9b. When was the last time you made use of information you received about the following? HIV/AIDS, Malaria, TB, family planning, mother & child health, health & hygiene, clean household water, Diarrhoea and Polio

Q 5.2 Only a minority of respondents used health information of the kinds listed on a daily basis. More worryingly, there were high levels that never used the information: family planning (33%); TB (23%); HIV/AIDS (18%); Mother and child health (17%); and polio (15%).

Used information	Today	Less than one week	Less than a month
Malaria	20%	28%	26%
Clean Water	20%	25%	22%
Health & Hygiene	16%	23%	30%
Mother & Child Health	8%	23%	28%
Polio	6%	28%	32%
HIV/AIDS	5%	27%	31%
TB	4%	15%	31%
Diahorrea	4%	19%	34%
Family Planning	3%	14%	25%

Base: Slightly less than all respondents and varies by topic

2. Face-To-Face Survey Overview Summary Results

10. Where did you get the information that you made use of for the following health areas? HIV/AIDS, Malaria, TB, family planning, mother & child health, health & hygiene, clean household water, Diarrhoea and Polio

Q 5.3 Less than half of the respondents used any of the suggested methods for sourcing the information they used on these health issues. The exceptions can all be found in the radio column and the most striking results were for malaria (76%), polio (64%) and clean water (63%).

Received info from	HIV/AIDS	Malaria	TB	FP*	MCH**	HH***	CW****	Diahorrea	Polio
TV	45%	37%	26%	30%	28%	31%	32%	21%	27%
Doctor	39%	37%	27%	33%	32%	28%	28%	27%	22%
Radio	26%	76%	44%	44%	55%	58%	63%	50%	64%
Govt Official	24%	23%	13%	14%	15%	18%	17%	14%	17%
Family	21%	15%	13%	15%	9%	13%	18%	9%	12%
Work or school	12%	8%	6%	4%	4%	8%	6%	13%	7%
Newspapers	11%	19%	7%	6%	5%	7%	6%	17%	3%
Cty Elders	10%	12%	6%	9%	7%	10%	11%	7%	11%
Internet	9%	8%	4%	3%	3%	4%	4%	13%	3%
Paper leaflets	8%	2%	2%	3%	5%	3%	2%	2%	3%
SMS	4%	4%	16%	3%	4%	16%	6%	2%	3%
Traditional healer	3%	6%	3%	7%	5%	6%	3%	2%	2%
Magazines	1%	1%	3%	1%	3%	4%	3%	6%	3%

* = Family Planning

** = Mother & Child's Health

***= Health and Hygiene

**** = Clean Water

Base: Slightly less than all respondents and varies by topic

2. Face-To-Face Survey Overview Summary Results

11. Please tell me whether the following statements are true (T) or false (F).

Q6.1 The responses to this question contain both good and bad news. The good news is that the overwhelming majority of respondents were able to separate the True and False statements. The bad news is that between 10-30% gave the wrong answers. Malaria messages seem to have been understood best whereas those for family planning and TB are less well understood.

	True	False
Catch HIV/AIDS from toilet seat or door knob (F)	14%	86%
Treated bed nets protect from malaria (T)	91%	9%
The symptoms of malaria (T)	91%	9%
Need to be tested by doctor to see if you have HIV/AIDS (T)	92%	8%
Family planning methods do not cause cancer (T)	76%	24%
Get HIV/AIDS from mosquito bites (F)	13%	87%
Contraceptive injections mean never have babies again (F)	23%	77%
Malaria passed on by mosquito bites (T)	86%	14%
One of my parents had TB, I'm likely to get it (F)	32%	68%
In touch with someone for many hours to catch TB	76%	24%
Taking Pill causes deformed babies	32%	68%
HIV/AIDS caused by exchange of bodily fluids (T)	84%	16%
Malaria caught from certain types of ants (F)	19%	81%
You should stop taking TB medicine when symptoms get better (F)	23%	77%
Medicines that can cure HIV/AIDS completely (F)	22%	78%
Those with weakened immune systems more likely to develop TB (T)	76%	24%
The Symptoms of TB (T)	84%	16%
Malaria cannot be cured in this country (F)	17%	83%
Get malaria from working in the fields (F)	13%	87%
Birth control pills will lead to very bad health problems (F)	33%	67%
Contraception can be good for a womens health (T)	73%	27%
Wash hands after wiping child's bottom (T)	96%	4%
Condoms prevent STIs like HIV (T)	87%	13%
Washing with soap kills all harmful germs	43%	57%
Bad hygiene leads to diahorrea in children which may cause them to die (T)	87%	13%

D. Senegal Face-To-Face Survey Report

D1. Senegal Key Responses Summary

The survey had 1003 respondents and is nationally representative with sampling in all regions. The key responses from interviewees can be summarized as follows:

1. Radio and mobile most widely owned, wider access to computers:

Senegalese respondents were most likely to own a mobile phone (90%), radio (87%), TV (75%) and MP3 player (27%). 19% owned a desktop computer and/or a laptop and 5% a tablet. Getting access to someone else's device means computer access overall is slightly higher with desktops (31% share) than laptops (19% share). So the percentage either owning or sharing taken together is as follows: desktop computer (50%) and laptop (38%). 17% owned their own Internet connection and 7% had access to someone else's. 20% or less owned the other devices identified.

2. Getting News and Information - Radio and TV dominate:

Senegalese respondents were most likely to get news and information from the following three sources: radio (76%), friends and family (66%) and TV (56%). Newspapers had a higher percentage of respondents than either Ghana or Northern Nigeria (28%). Social media (4%) and SMS (2%) barely registered. Internet is used on a daily basis by 13% of respondents. However the percentage of urban respondents using Internet in this way (30%) was a great deal higher than in rural areas (4%).

3. Top 3 uses of Mobile - Voice, radio, SMS but almost a quarter use

Internet: Senegalese respondents' *once a day (more than once a day + once a day)* use of their mobiles was as follows: voice calls (92%); radio (64%); SMS (50%); Internet (22%); live TV (19%); Games (18%); Social Media (15%); Photo/ Video Clip(15%); Apps (7%); You Tube 5%). Two things stand out from these results in comparison to Ghana. Firstly, daily Internet use is lower in Senegal and SMS use is higher. Secondly, the number using social media for news and information (4%) is much lower than the numbers using it daily on their phone, implying that the majority see it either for personal use or some other use.

4. Only 14% use social media regularly:

14% of all respondents either use Facebook more than once a day or on a daily basis: this proportion is likely to grow as Internet use grows. A significant number of respondents are using Facebook via SMS which demonstrates the attractions of this social media platform, particularly to younger users. 21% of respondents had posted a comment on an online forum but other forms of social engagement were much less well used.



5. Getting Health Information - Radio and TV most trusted: Friends and Family, TV and radio were by far the most trusted media for getting health information: radio is marginally less trusted than television. However, only around half of the respondents could say they always trusted or sometimes trusted them. All other sources of information were far less trusted.

6. Health Information - Below 50% had received within 12 months : With the exception of malaria, below 50% had received information on the listed health topics in the last 12 months.

7. Using Health Information - Below 50% had used within 12 months: Again with the exception of malaria, below 50% had used information on the listed health topics in the last 12 months.

8. Understanding Health Information - Most likely to not know about family planning: Respondents were asked whether various statements about the health issues in focus were either true or false. Respondents were more likely to get the family planning questions wrong.

D2. Senegal Question-by Question Breakdown of Results

1. Which of the following do you own, or do you use anyone else’s? mobile phone, desktop computer laptop, tablet, fixed phone line, internet connection, TV, pay TV service, PVR, set top box, satellite dish, MP3 player, radio

Q 1.1 Senegalese respondents were most likely to own a mobile phone (90%), radio (87%), TV (75%) and MP3 player (27%). 19% owned a desktop computer and/or a laptop and 5% a tablet. Getting access to someone else’s device means computer access overall is slightly higher with desktops (31% share) and laptops (19% share). So the percentage either owning or sharing taken together is as follows: desktop computer (50%) and laptop (38%). 17% owned their own internet connection and 7% had access to someone else’s. 20% or less owned the other devices identified.

2. How frequently do you use the following to get news and information? TV, radio, papers, magazine, internet, social media, SMS, friends & family to get news and information

Q 1.2 Senegalese respondents were most likely to get news and information from the following three sources: radio (76%), friends and family (66%) and TV (56%). Newspapers had a higher percentage respondents than either Ghana or Northern Nigeria (28%). Social media (4%) and SMS (2%) barely registered.

Internet is used on a daily basis to get news and information by 13%. However the percentage of urban respondents using Internet in this way (30%) was a great deal higher than in rural areas (4%).

3. Do you ever listen to (radio station)?

Q1.3A 46 radio stations were listed and although this was a long list, 16% said they listened to other radio stations. Some of the radio stations were regional or local and therefore do not score well on a national sample. There are nine radio stations shown below that claim a significant portion of ever listened to and Walf FM, RFM and Sud FM are the dominant players. Walf FM’s daily reach is identical in both urban and rural areas:

	Ever	Of ever, listening daily
Walf FM	84%	61%
RFM	74%	64%
Sud FM	68%	46%
RSI	52%	43%
Zik FM	45%	61%
RTS	44%	55%

2. Face-To-Face Survey Overview Summary Results

Dunya FM	33%	30%
Dakar FM	22%	17%
Lamp Fall FM	22%	28%

Base respondents: Ever: 927 Frequency: 775

Percentages in the second column have been rounded up.

The other 37 stations each got below 20% and this illustrates the level of fragmentation of radio audiences in markets where radio licences have been liberalised.

Q1.3B In terms of TV stations, there are five main players in a market of 18 TV channels.

The TV market is less fragmented than the radio market and as a result audiences have greater levels of loyalty to a station, particularly to the Government broadcaster RTS. However, the pattern of “ever watching” suggests that other than the top 5 channels, viewers are likely to be far less loyal to particular stations. Unlike other countries, both a pay TV operator (Canal Horizons) and an international channel (TV5) get above 20%.

	Ever	Of ever, watching daily
RTS1	97%	75%
2STV	88%	68%
TFM	81%	34%
Walf TV	81%	65%
RDV	78%	52%
Sen TV	55%	56%
Africa 7	40%	39%
TV5	41%	72%
2S Racines	37%	32%
Lamp Fall TV	32%	30%
LCS	28%	20%
Canal Horizons	26%	26%

Respondents: Ever: 856 Daily: 635

The other 6 TV stations listed had audiences below 20%.

2. Face-To-Face Survey Overview Summary Results

Q1.3C 15 newspapers were listed and three can lay claim to being dominant players in the newspaper market. There is a far more established newspaper habit than in Ghana and Northern Nigeria.

	Ever
Le Soleil	56%
Stade	56%
Le Populaire	51%
Le Quotidien	43%
Walf Grand Place	43%
L'As	41%
Walf Quotidien	40%
Walf Sport	33%
La Tribune	32%
Direct Info	25%
Rewmi	20%

Respondents: Ever: 500

4. How frequently do you use your mobile phone for the following? voice calls, internet, apps, social media, SMS, photo/video clips, games, radio, watch live TV and watch videos on YouTube

Q 2.1 Senegalese respondents' *once a day (more than once a day + once a day)* use of their mobiles was as follows: voice calls (92%); radio (64%); SMS (50%); Internet (22%); live TV (19%); Games (18%); Social Media (15%); Photo/Video Clip(15%); Apps (7%); and You Tube 5%)

Two things stand out from these results in comparison to Ghana. Firstly, daily Internet use is lower in Senegal and SMS use is higher. Secondly, the number using social media for news and information (4%) is much lower than the numbers using it daily on their phone, implying that the majority see it for personal use or some other use.

2. Face-To-Face Survey Overview Summary Results

- 4a. What do you use each of the following mobile phone features for?
- voice calls, internet, apps, social media, SMS, photo/video clips, games, radio, watch live TV and watch videos on YouTube
 - keeping in touch with friends & family, following the news, to get specific information for work, to get specific information for home, for fun & entertainment, for the purposes of worship.

Q 2.2A The Senegalese respondents used their mobile phone for the following things:

	Voice	Internet	Apps	Social Media	SMS	Photo/Video	Games
In touch with friends and family	98%	58%	7%	47%	61%	1%	3%
Getting home information	0%	26%	2%	2%	3%	1%	1%
Getting work information	3%	35%	7%	2%	8%	1%	0%
Fun and entertainment	25%	45%	40%	14%	23%	45%	58%
Following news	20%	35%	3%	6%	1%	2%	1%
Worship	14%	14%	1%	0%	0%	1%	3%

There are two striking findings compared to the Ghanaian respondents. Firstly, the Senegalese respondents primarily use their phone as something to keep in touch with friends and family. All other uses are much less well used than among the Ghanaian respondents. Secondly, the one exception is using the Internet to follow the news where the percentage is about double that in the Ghana face-to-face survey.

- 4b. On a scale of 1-3 (where 1 means most important and 3 least important) how important are each of these?

Q2.2B Respondents using each of these features were asked to rate in terms of importance the things described in the previous question. The table below shows those things listed as most important by those using them. Compared to Ghanaian respondents, the items in the bottom half of the rankings table below were seen as most important by less Senegalese respondents. This implies a lower level of familiarity with smartphones and feature phones:

2. Face-To-Face Survey Overview Summary Results

Most Important on mobile phone	
Voice Calls	90%
Internet	67%
Radio	63%
SMS	59%
Games	39%
Live TV	32%
Social Media	17%
Apps	11%
Photo/video clip	9%
You Tube	10%

Respondents: Vary by item

5. How frequently do you use these following social media: Facebook, Twitter, YouTube, MXit, 2go, Eskimi, biNu, Google+?

Q 2.3.1 16% of all respondents - compared to 27% in Ghana - had used Facebook (more than once a week) with other social media being far less well used. The table below shows the platforms used by social media respondents on a more than once a day or daily basis, with Facebook dominating the field. Senegalese respondents were more likely to use You Tube than Ghanaian respondents. Local social media site FaceDakar has gathered a small but significant market share:

	More than once a day	Once a day
Facebook	42%	15%
Google+	13%	10%
You Tube	13%	11%
FaceDakar	9%	2%
Twitter	8%	8%
Eskimi	4%	1%
Twoo	0%	2%
Hi5	0%	2%
MXit	0%	1%
2Go	2%	3%
biNu	1%	2%

Based on 247 respondents

2. Face-To-Face Survey Overview Summary Results

6a. Which of the following SMS services do you use? local news headlines, international news headlines, educational services, sports information, SMS messages on Facebook, Music services, Google SMS chat and M-money services

Q2.4a&b SMS messaging is used by less mobile phone owners for a wide range of services compared to Ghana. Also, those using those using these services regularly (more than once a day or daily) are much smaller percentage. However, local and international news remain key functions:

	Use	1+ a day	Once a day
M-Money	40%	7%	9%
Local News	27%	29%	22%
SMS/Facebook	25%	26%	22%
Sports Info	19%	13%	17%
International News	17%	11%	32%
Education Services	10%	5%	25%
Google SMS chat	10%	7%	9%
Music Services	6%	19%	3%

Respondents: Use: 572;

6b. How frequently do you use the following services on internet? Local news websites, international news websites, information from NGO websites, sports information, internet radio, sports websites, YouTube

Q2.5A&B Senegalese respondents were asked how frequently they used different types of services on the Internet. You Tube is more widely used than in Ghana, possibly because there is wider availability of 3G and 3G+ in urban areas:

	1+ a day	Once a day	Weekly
Local News	21%	26%	13%
You Tube	18%	9%	14%
Sports websites	8%	16%	9%
International News	11%	22%	18%
Internet Radio	5%	5%	4%
NGO Websites	5%	2%	4%

Respondents: Total: 243

6c. Comparing SMS and Internet usage

SMS provides information that is extremely limited and is most effective with things like news headlines. Using Facebook and Google SMS Chat are hybrid uses that allow those with basic phones to get involved in social media and the former is well used. The Internet is used by less people but is able to provide both text and pictures. Regular Internet users of the things outlined in Q2.5A above are only a relatively small segment of overall Internet users.

7. How frequently have you written a blog, posted a comment on an online forum, posted a photo to a sharing site, made a video and posted it onto a sharing site, makes a conference call on skype; got news from an RSS feed and connected with work colleagues on LinkedIn?

Q2.5B This question was asked of respondents to try and identify the degree to which respondents were actively posting or using social media in some way. Posting comments on a forum was the most used of these social media activities but overall being actively involved in self-generating content is still a minority activity. Senegalese respondents were less actively involved in these activities than Ghanaian respondents although they used Skype significantly more than them:

	1+ a day	Once a day	Weekly
Posted on a Forum	12%	3%	6%
Conf call on Skype	12%	11%	14%
Written a blog	8%	11%	4%
Posted a photo	5%	2%	4%
Posted a video	5%	2%	6%
News from RSS feed	5%	2%	3%
Connected on LinkedIn	4%	3%	1%

Based on 342 respondents.

2. Face-To-Face Survey Overview Summary Results

Q3.1 The majority of respondents will be upgrading their mobile phone but only a quarter or less of respondents will be upgrading the other items listed. This is significantly less than for the Ghanaian respondents.

Will buy, hire or upgrade in the next 12 months	
Mobile	62%
Radio	26%
TV	25%
Better Internet	24%
Laptop	24%
Digital Set Top Box	17%
Pay TV	16%
Tablet	11%
Desktop computer	10%
PVR	8%

Respondents: 625

Q3.2 Respondents were asked what kind of phone they could afford to change to and were offered different functionalities. The ability to play music and videos were the two most favoured things for a new mobile to do but all of the things offered over 50% except access to the Internet.

Afford to change to a phone that:	
Can play music on	73%
Play videos on	68%
Has a touch screen	65%
Can download apps	50%
Can access the Internet	35%

Respondents: 625

9. Exploring issues of trust with different media

Q4.1 How much do you trust news from (media or source named)?

Senegalese respondents were most likely to trust news from friends and family and television ahead of radio but all other sources were always trusted or nearly always trusted by around a quarter of respondents or less. Overall levels of trust were far lower than amongst the Ghanaian respondents.

2. Face-To-Face Survey Overview Summary Results

	Always Trust	Nearly Always Trust
Friends and Family	32%	20%
TV	31%	21%
Radio	23%	25%
Government Officials	15%	15%
SMS	7%	10%
Other people in community	6%	18%
Posters or Billboards	5%	10%
Newspapers	3%	9%
Brochures & Pamphlets	3%	8%
Internet	4%	3%
Social Media	2%	4%
Magazines	1%	3%

Respondents: 1003

10a. When was the last time you received information about the following? HIV/AIDS, Malaria, TB, family planning, mother & child health, health & hygiene, clean household water, Diarrhoea and Polio

Q5.1 Under 10% of respondents said they had received information on these health issues on the day of the survey, considerably less than amongst the Ghanaian respondents. Issues less frequently named were TB, diahorrea, and polio. This conclusion is also reflected in the qualitative part of the research. Between 20-25% had *never* received information about any of these issues, a much higher rate than amongst Ghanaian respondents.

Seen information	Today	Less than one week	Less than a month
Malaria	8%	30%	18%
Family Planning	5%	16%	20%
Health & Hygiene	5%	18%	20%
Clean Water	5%	15%	19%
Mother & Child Health	4%	15%	21%
HIV/AIDS	3%	23%	22%
TB	2%	18%	21%
Diahorrea	2%	12%	17%
Polio	2%	11%	16%

Respondents: 1003

2. Face-To-Face Survey Overview Summary Results

9b. When was the last time you made use of information you received about the following? HIV/AIDS, Malaria, TB, family planning, mother & child health, health & hygiene, clean household water, Diarrhoea and Polio

Q 5.2 The information most likely to be acted upon by respondents today was about malaria, health and hygiene, family planning and clean water. 60% had not used information about Polio for a long time. Those never making use of information received were around 5% or below.

Used information	Today	Less than one week	Less than a month
Malaria	7%	30%	18%
Health & Hygiene	6%	20%	25%
Family Planning	5%	19%	23%
Clean Water	5%	17%	23%
Mother & Child Health	4%	18%	24%
HIV/AIDS	3%	24%	22%
TB	3%	20%	24%
Diahorrea	2%	17%	22%
Polio	1%	14%	20%

Respondents: 840

10. Where did you get the information that you made use of for the following health areas? HIV/AIDS, Malaria, TB, family planning, mother & child health, health & hygiene, clean household water, Diarrhoea and Polio

Q 5.3 Whereas for Ghana, it was possible to identify primary sources used by almost all the population (radio and TV), in Senegal neither of these media reach more than two-thirds of the population. In Ghana many of the other sources got relatively large percentage responses and might reasonably be described as secondary. By contrast, of these other sources got more than a 15% response and almost all were in single figure percentages.

Received info from	HIV/AIDS	Malaria	TB	FP*	MCH**	HH***	CW****	Diahorrea	Polio
Radio	67%	72%	64%	65%	62%	60%	58%	60%	62%
TV	64%	63%	53%	52%	51%	51%	52%	54%	56%
Doctor	14%	15%	12%	13%	13%	12%	8%	10%	10%
Family	13%	17%	10%	9%	10%	12%	11%	9%	7%
Newspapers	10%	9%	5%	6%	6%	5%	5%	5%	6%

2. Face-To-Face Survey Overview Summary Results

Work or school	5%	4%	4%	16%	3%	3%	4%	4%	3%
Internet	5%	4%	2%	3%	3%	3%	3%	2%	2%
Paper leaflets	4%	5%	3%	4%	3%	3%	2%	1%	2%
Magazines	3%	2%	2%	2%	2%	2%	2%	2%	2%
Govt Official	2%	2%	2%	1%	1%	2%	1%	1%	1%
Cty Elders	2%	3%	2%	3%	2%	3%	3%	2%	2%
SMS	0%	1%	0%	0%	0%	1%	0%	0%	0%
Traditional healer	0%	0%	1%	1%	1%	1%	0%	1%	0%

Respondents vary

* = Family Planning

** = Mother & Child's Health

***= Health and Hygiene

**** = Clean Water

11. Please tell me whether the following statements are true (T) or false (F).

Q6.1 Compared to the Ghana respondents, these Senegalese respondents were both less likely to get the right answer and those getting the wrong answer are more numerous (than in Ghana) in almost all instances. They seemed to get questions on family planning wrong most and in the greatest number.

	True	False
Catch HIV/AIDS from toilet seat or door knob (F)	8%	92%
Treated bed nets protect from malaria (T)	94%	6%
The symptoms of malaria (T)	93%	7%
Need to be tested by doctor to see if you have HIV/AIDS (T)	89%	11%
Family planning methods do not cause cancer (T)	50%	50%
Get HIV/AIDS from mosquito bites (F)	20%	80%
Contraceptive injections mean never have babies again (F)	20%	80%
Malaria passed on by mosquito bites (T)	84%	16%
One of my parents had TB, I'm likely to get it (F)	72%	28%
In touch for many hours to catch TB (T)	65%	35%
Mothers give birth to deformed babies from taking the pill (F)	45%	55%
HIV/AIDS caused by exchange of bodily fluids (T)	79%	21%
Malaria caught from certain types of ants (F)	18%	82%



2. Face-To-Face Survey Overview Summary Results

You should stop taking TB medicine when symptoms get better (F)	31%	69%
Medicines that can cure HIV/AIDS completely (F)	23%	77%
Those with weakened immune systems more likely to develop TB (T)	83%	17%
The Symptoms of TB (T)	78%	22%
Malaria cannot be cured in this country (F)	26%	74%
Get malaria from working in the fields (F)	37%	63%
Catching tuberculosis from coughing (T)	79%	21%
Birth control pills will lead to very bad health problems (F)	66%	34%
Contraception can be good for a womens health (T)	67%	33%
Wash hands after wiping child's bottom (T)	89%	11%
Condoms prevent STIs like HIV (T)	90%	10%
Washing with soap kills all harmful germs (F)	90%	10%
Bad hygiene leads to diahorrea in children which may cause them to die (T)	91%	9%

E. Tanzania Face-To-Face Survey Report

E1. Tanzania Key Responses Summary

The survey had 1001 respondents and is nationally representative with sampling in all regions. The key responses from interviewees can be summarized as follows:

1. Most owned devices - mobile and radio : The most commonly owned devices are a mobile phone (91%), a radio (82%), a TV (52%) a Pay TV service (27%) and a digital set-top box (21%). The mobile is the most widely owned device and as the results below show it is both a media carrier (used for radio listening) and a media in its own right (for getting news and information). 69% of respondents will buy, hire or upgrade their mobile phone in the next 12 months: Overwhelmingly, the majority want smartphone features like Internet and a touch screen. Taking owning and sharing together, 14% own or have access to a desktop computer and 14% have access to a laptop. 17% owned their own Internet connection and 7% had access to someone else's. 20% or less owned the other devices identified.

2. Getting News and Information - Radio and TV dominate: Radio (86%), Friends and Family (61%) and TV (55%) dominate the getting of news by respondents. Newspapers were only used on a daily basis by 13% of respondents. SMS is much more widely used than in Senegal (39%). Internet and social media are only used on a daily basis by below 10% of respondents (7% for both). However the percentage of urban respondents using Internet in this way (30%) was a great deal higher than in rural areas (4%).

3. Use of Mobile as Media - 63% use it to follow the news: On a daily basis, 62% of respondents used their mobile phone (with a receiver) to listen to radio, 26% to access the Internet and 18% to access social media. Of those using the mobile to access the Internet, 63% used it to follow the news; 19% to get home information; and 36% to get work information. Smaller proportions used social media for these three things. Of those using SMS for these tasks, 44% followed news headlines; 27% got home information; and 23% work information. 33% considered social media either Most Important or Important and 31% considered Internet either Most Important or Important on their mobile phone. 20% of respondents using Internet had used NGO websites on a weekly or more than weekly basis.

4. 25% of those surveyed had posted an online comment: 17.4% of all respondents either use Facebook more than once a day or on a daily basis: this proportion is likely to grow as Internet use grows. A significant number of respondents are using Facebook via SMS which demonstrates the attractions



of this social media platform, particularly to younger users. Facebook is the dominant social media platform but both You Tube (28%) and Google+ (26%) were popular amongst those using social media. 25% of respondents had posted a comment on an online forum but other forms of social engagement were much less well used.

5. Getting Health Information - Radio and TV most trusted media: TV and radio were by far the most trusted media for getting health information. On an Always Trust basis, TV scored 66% and radio 64%. They were also the most used media for getting information by respondents on these health issues and thus might be described as primary information sources. Trusted secondary information sources on Always Trust basis include friends and family (37%), SMS (22%) and Government Officials (17%).

6. Receiving Health Information - 3 gaps emerge: Over 70% had received health information on the listed issues except for (in declining order): tuberculosis; diarrhoea; and polio. The latter was the one on which least information was received by respondents in the last 12 months.

7. Using Health Information - 5 gaps emerge: Over 70% had used health information from the listed issues except for (in declining order) family planning; mother and child health; tuberculosis; diarrhoea; and polio. The latter was the one on which least information was used.

8. Understanding Health Information 10-30% gave wrong answers: Respondents were asked whether various statements about the health issues in focus were either true or false. The good news is that the overwhelming majority got the correct answers. The bad news is that for some statements between 10-20% of respondents gave the wrong answers.

E2. Tanzania Question-by Question Breakdown of Results

1. Which of the following do you own, or do you use anyone else's? mobile phone, desktop computer laptop, tablet, fixed phone line, internet connection, TV, pay TV service, PVR, set top box, satellite dish, MP3 player, radio

Q 1.1 Tanzanian respondents were most likely to own a mobile phone (91%), radio (82%), TV (52%), Pay TV service (27%) and a digital set-top box (21%). 3% owned a desktop computer, 6% a laptop and only 1% a tablet. Getting access to someone else's device means computer access overall is slightly higher with desktops (14% share) and laptops (14% share), a relatively low percentage compared to Ghana. 15% owned an Internet connection and 5% had access to someone else's.

So the percentage either owning or sharing taken together is as follows: desktop computer (50%) and laptop (38%). 17% owned their own Internet connection and 7% had access to someone else's. 20% or less owned the other devices identified.

2. How frequently do you use the following to get news and information? TV, radio, papers, magazine, internet, social media, SMS, friends & family to get news and information

Q 1.2 Tanzanian respondents were most likely to get news and information from the following three sources: radio (86%), friends and family (81%) and TV (55%). Newspapers were only used on a daily basis by 13% of respondents. SMS is much more widely used than in Senegal (39%).

Internet and social media are only used on a daily basis by below 10% of respondents (7% for both).

3. Do you ever listen to (radio station)?

Q1.3A 26 radio stations were listed and although this was a long list, 25% said they listened to other radio stations. Some of the radio stations were regional or local and therefore do not score well on a national sample. There are 12 radio stations shown below that claim a significant portion of ever listened to and TBC Taifa, Radio One, RFA, TBC FM and Clouds FM are the dominant players:

	Ever	Of ever, listening daily
TBC Taifa	87%	51%
Radio One	85%	54%
RFA	77%	60%
TBC FM	76%	40%
Clouds FM	74%	53%
East Africa Radio	51%	39%

2. Face-To-Face Survey Overview Summary Results

Kiss FM	45%	24%
Radio Maria	33%	27%
Times FM	28%	36%
Passion FM	24%	25%
Radio Tumaini	22%	21%
Magic FM	21%	24%

Respondents: Ever: 996

The other 14 radio stations get 16% or below “ever listened” percentages and most are in single figures.

Q1.3B In terms of TV stations, there are five main players in a market of 19 TV channels.

The TV market is less fragmented than the radio market and as a result audiences have greater levels of loyalty to a station, particularly to the privately run ITV and the Government broadcast channel TBC1. These top 2 stations command far higher levels of daily viewership loyalty than other stations. The survey may to some extent under-represent regional stations like TV Zanzibar and TV Mwanza.

However, what is most striking is that TV’s reach on the top 2 TV stations is as good as radio: this is the highest level of TV reach amongst the four countries where face-to-face surveys were conducted. The level of TV watching by ever watched in the regions is almost 100% in all regions except: Morogoro (90%); Dodoma (89%); Pwani (85%); Kilimanjaro (85%); and Rukwa (67%). And because television is less fragmented, there is a higher chance of reaching audiences through ITV and TBC1.

	Ever	Of ever, watching daily
ITV	99%	61%
TBC1	96%	63%
Star TV	89%	46%
Channel 10	83%	29%
EATV/Channel 5	82%	42%
TBC2	48%	33%
Channel 4	42%	56%
Pulse/Capital TV	36%	18%
DTV	31%	22%

Respondents: Ever: 878

2. Face-To-Face Survey Overview Summary Results

The other 10 TV stations listed had audiences below 20%.

Q1.3C 28 newspapers were listed and two (Mwananchi and Nipashe) can lay claim to being dominant players in the newspaper market. There is a far more established newspaper habit than in Ghana, Northern Nigeria or Senegal. However, daily reading among respondents is much lower: for example, Mwananchi (43%) and Nipashe (34%). As Swahili is the official language of the country, it is not surprising that the English language newspapers do significantly less well in terms of reach.

Strikingly, for the leading paper in the survey - Mwananchi - there are regional variations in its “ever read” responses but only Zanzibar (50%) is significantly less.

	Ever
Mwananchi	86%
Nipashe	81%
Ijumaa	66%
Mwanaspoti	60%
Mtanzania	59%
Majira	48%
Uwazi	48%
Sani	37%
Championi	34%
Risasi	30%
Tanzania Daima	29%
Mtanzania	27%
Kiu	27%
Dimba	26%
Spoti Starche	22%
Habari Leo	22%
Uhuru	21%

Respondents: Ever: 728

The other 11 newspapers all had ever read percentages from respondents of below 20%

2. Face-To-Face Survey Overview Summary Results

4. How frequently do you use your mobile phone for the following? voice calls, internet, apps, social media, SMS, photo/video clips, games, radio, watch live TV and watch videos on YouTube

Q 2.1 Tanzanian respondents' *once a day (more than once a day + once a day)* use of their mobiles was as follows: voice calls (97%); SMS (77%); radio (62%); Internet (26%); Social Media (18%); live TV (8%); Games (12%); Apps (10%); Photo/Video Clip (9%); and You Tube 5%)

Two things stand out from these results in comparison to the other countries survey. Firstly, daily Internet use is comparable with that in Ghana. Secondly, overall use of the different functions is also comparable to Ghana.

4a. What do you use each of the following mobile phone features for?

- voice calls, internet, apps, social media, SMS, photo/video clips, games, radio, watch live TV and watch videos on YouTube
- keeping in touch with friends & family, following the news, to get specific information for work, to get specific information for home, for fun & entertainment, for the purposes of worship.

Q 2.2A The Tanzanian respondents used their mobile phone for the following things:

	Voice	Internet	Apps	Social Media	SMS	Photo/ Video	Games
In touch with friends and family	98%	53%	18%	72%	90%	6%	4%
Getting home information	33%	19%	3%	3%	27%	2%	2%
Getting work information	31%	36%	13%	13%	23%	2%	1%
Following news	29%	63%	31%	44%	44%	9%	5%
Fun and entertainment	12%	20%	65%	41%	14%	74%	82%
Worship	3%	2%	4%	2%	1%	1%	0%

Respondents: 816 for voice and lower for all other functions

The primary use of the mobile phone - whether voice, SMS, social media or Internet - is to keep in touch with friends and family. However, just under two-thirds of those using Internet, use it to follow the news and just over a third use it to get information for work.

2. Face-To-Face Survey Overview Summary Results

4b. On a scale of 1-3 (where 1 means most important and 3 least important) how important are each of these?

Q2.2B Respondents using each of these features were asked to rate in terms of importance the things described in the previous question. The table below shows those things listed as most important by those using them. Except for the bottom three items, all of the suggested functions were seen as most important by at least a third of respondents. The three most important were: voice calls, SMS and radio.

Most Important on mobile phone	
Voice Calls	89%
SMS	58%
Radio	52%
Live TV	35%
Social Media	33%
Internet	31%
Apps	30%
Games	12%
Photo/video clip	10%
You Tube	10%

Respondents: Vary by item

5. How frequently do you use these following social media: Facebook, Twitter, YouTube, MXit, 2go, Eskimi, biNu, Google+?

Q 2.3.1 14% of all respondents - compared to 27% in Ghana and 16% in Senegal - had used Facebook (more than once a week) with other social media being far less well used. The table below shows the platforms used by social media respondents on a more than once a day or daily basis, with Facebook dominating the field a quarter to a third making use of You Tube, Google+ and Twitter on a more than a once a day basis. This level of You Tube use is exceptional amongst the four countries with face-to-face surveys.

2. Face-To-Face Survey Overview Summary Results

	More than once a day	Once a day
Facebook	56%	15%
You Tube	28%	8%
Google+	26%	14%
Twitter	25%	26%
2Go	1%	2%
biNu	1%	1%
MXit	1%	0%
Eskimi	1%	0%

Based on 176 respondents

6a. Which of the following SMS services do you use? local news headlines, international news headlines, educational services, sports information, SMS messages on Facebook, Music services, Google SMS chat and M-money services

Q2.4a&b The most well-used SMS functions were m-money and local news: all other functions were much less widely used.

	Use	1+ a day	Once a day
M-Money	97%	11%	13%
Local News	32%	19%	26%
Education Services	17%	14%	24%
Sports Info	15%	22%	26%
SMS/Facebook	14%	42%	17%
International News	13%	20%	25%
Google SMS chat	10%	28%	22%
Music Services	9%	15%	21%

Respondents: Use: 748

6b. How frequently do you use the following services on internet? Local news websites, international news websites, information from NGO websites, sports information, internet radio, sports websites, YouTube

Q2.5A&B Tanzanian respondents were asked how frequently they used different types of services on the Internet. The most frequently used services or information were local news and You Tube.

2. Face-To-Face Survey Overview Summary Results

	1+ a day	Once a day	Weekly
Local News	23%	17%	7%
You Tube	16%	4%	7%
International News	14%	21%	7%
Sports websites	12%	8%	8%
Internet Radio	5%	8%	6%
NGO Websites	4%	4%	6%

Respondents: Total: 197

6c. Comparing SMS and Internet usage

SMS provides information that is extremely limited and is most effective with things like news headlines. Using Facebook and Google SMS Chat are hybrid uses that allow those with basic phones to get involved in social media and the former is well used. The Internet is used by less people but is able to provide both text and pictures. Regular Internet users of the things outlined in Q2.5A above are only a relatively small segment of overall internet users.

7. How frequently have you written a blog, posted a comment on an online forum, posted a photo to a sharing site, made a video and posted it onto a sharing site, makes a conference call on skype; got news from an RSS feed and connected with work colleagues on LinkedIn?

Q2.5B This question was asked of respondents to try and identify the degree to which respondents were actively posting or using social media in some way. Posting comments on a forum was the most used of these social media activities but overall being actively involved in self-generating content is still a minority activity.

	1+ a day	Once a day	Weekly
Posted on a Forum	25%	19%	9%
Posted a photo	11%	18%	10%
Written a blog	10%	7%	9%
Posted a video	6%	4%	4%
News from RSS feed	2%	2%	3%
Connected on LinkedIn	2%	1%	2%
Conf call on Skype	1%	3%	3%

Based on 197 respondents.

2. Face-To-Face Survey Overview Summary Results

Q3.1 The majority of respondents will be upgrading their mobile phone and radio but significant numbers will be upgrading things associated with TV: the TV itself, the set-top box; and their Pay TV service. This focus on TV items has undoubtedly been brought about by the digital transition in broadcasting in the country.

Will buy, hire or upgrade in the next 12 months	
Mobile	69%
Radio	65%
TV	57%
Digital Set Top Box	40%
Pay TV	31%
Better Internet	26%
Laptop	18%
Desktop computer	12%
Tablet	9%
PVR	8%

Respondents: 1001

Q3.2 Respondents were asked what kind of phone they could afford to change to and were offered different functionalities. The ability to play music and videos were the two most favoured things for a new mobile to do but all of the things listed got a positive response from over half of the respondents.

Afford to change to a phone that:	
Can play music on	80%
Play videos on	63%
Can access the Internet	61%
Has a touch screen	60%
Can download apps	54%

Respondents: 686

9. Exploring issues of trust with different media

Q4.1 How much do you trust news from (media or source named)?

Tanzanian respondents were most likely to trust news from television and radio but a significant number trust friends and family. Overall levels of trust are much higher than for Senegal.

2. Face-To-Face Survey Overview Summary Results

	Always Trust	Nearly Always Trust
TV	66%	20%
Radio	64%	23%
Friends and Family	37%	30%
SMS	22%	32%
Government Officials	17%	31%
Other people in community	17%	33%
Newspapers	14%	25%
Posters or Billboards	10%	21%
Brochures & Pamphlets	8%	24%
Magazines	6%	16%
Internet	6%	15%
Social Media	5%	14%

Respondents: 1001

10a. When was the last time you received information about the following? HIV/ AIDS, Malaria, TB, family planning, mother & child health, health & hygiene, clean household water, Diarrhoea and Polio

Q5.1 There are much higher levels of information received on the named diseases in Tanzania than there is in Senegal. With the exception of polio (24%), only between 1-4% had never received information on these health issues.

Seen information	Today	Less than one week	Less than a month
Malaria	33%	32%	19%
Clean Water	31%	24%	19%
HIV/AIDS	29%	34%	17%
Health & Hygiene	26%	28%	20%
Mother & Child Health	21%	27%	24%
Family Planning	18%	27%	25%
TB	7%	24%	33%
Diahorrea	7%	23%	28%
Polio	4%	13%	28%

Respondents: 1001

2. Face-To-Face Survey Overview Summary Results

9b. When was the last time you made use of information you received about the following? HIV/AIDS, Malaria, TB, family planning, mother & child health, health & hygiene, clean household water, Diarrhoea and Polio

Q 5.2 The information most likely to be acted upon by respondents today was about clean water, malaria and health and hygiene. Those answering never used in significant numbers were as follows: polio (32%); family planning (19%); mother and child health (18%); TB (17%); HIV/AIDS (10%); and diahorrea (10%).

Used information	Today	Less than one week	Less than a month
Clean Water	33%	31%	18%
Health & Hygiene	26%	32%	23%
Malaria	25%	32%	23%
HIV/AIDS	19%	33%	20%
Family Planning	12%	27%	24%
Mother & Child Health	12%	29%	23%
TB	8%	25%	29%
Diahorrea	7%	25%	24%
Polio	5%	17%	28%

Respondents: 1001

10. Where did you get the information that you made use of for the following health areas? HIV/AIDS, Malaria, TB, family planning, mother & child health, health & hygiene, clean household water, Diarrhoea and Polio

Q 5.3 Radio, TV and the doctor are the three most important sources for information on the health issues listed: all other sources are secondary. The low percentage of respondents for polio indicate that less information is available on this topic.

Received info from	HIV/AIDS	Malaria	TB	FP*	MCH**	HH***	CW****	Diahorrea	Polio
Radio	79%	77%	56%	60%	61%	61%	62%	50%	34%
TV	65%	53%	38%	45%	45%	46%	45%	36%	25%
Doctor	48%	48%	41%	46%	47%	48%	43%	27%	26%
Family	36%	35%	25%	28%	28%	35%	36%	9%	17%
Newspapers	31%	23%	17%	18%	19%	18%	16%	15%	13%
Cty Elders	21%	17%	13%	12%	14%	19%	18%	14%	9%
Work or school	19%	18%	11%	13%	12%	15%	18%	13%	10%

2. Face-To-Face Survey Overview Summary Results

Paper leaflets	14%	11%	10%	9%	9%	7%	8%	7%	7%
Magazines	11%	7%	6%	7%	8%	6%	5%	2%	4%
SMS	10%	10%	7%	10%	10%	9%	9%	8%	4%
Govt Official	7%	4%	2%	2%	1%	3%	4%	4%	4%
Internet	5%	4%	3%	2%	3%	3%	2%	2%	2%
Traditional healer	1%	1%	1%	1%	1%	1%	1%	1%	1%

Respondents vary

* = Family Planning

** = Mother & Child's Health

*** = Health and Hygiene

**** = Clean Water

11. Please tell me whether the following statements are true (T) or false (F).

Q6.1 The Tanzanian respondents were more likely to get the right answer on the true and false statements. Nevertheless, on some questions there are between 10-30% of respondents that do not get the right answer:

	True	False
Catch HIV/AIDS from toilet seat or door knob (F)	15%	85%
Treated bed nets protect from malaria (T)	91%	9%
The symptoms of malaria (T)	94%	6%
Need to be tested by doctor to see if you have HIV/AIDS (T)	91%	9%
Family planning methods do not cause cancer (T)	87%	13%
Get HIV/AIDS from mosquito bites (F)	19%	81%
Contraceptive injections mean never have babies again (F)	18%	82%
Malaria passed on by mosquito bites (T)	81%	19%
One of my parents had TB, I'm likely to get it (F)	29%	71%
In touch for many hours to catch TB (T)	78%	22%
Mothers give birth to deformed babies from taking the pill (F)	23%	77%
HIV/AIDS caused by exchange of bodily fluids (T)	86%	14%
Malaria caught from certain types of ants (F)	19%	81%
You should stop taking TB medicine when symptoms get better (F)	14%	86%
Medicines that can cure HIV/AIDS completely (F)	17%	83%



2. Face-To-Face Survey Overview Summary Results

Those with weakened immune systems more likely to develop TB (T)	84%	16%
The Symptoms of TB (T)	85%	15%
Malaria cannot be cured in this country (F)	15%	85%
Get malaria from working in the fields (F)	13%	87%
Catching tuberculosis from coughing (T)	28%	72%
Birth control pills will lead to very bad health problems (F)	23%	77%
Contraception can be good for a womens health (T)	85%	15%
Wash hands after wiping child's bottom (T)	91%	9%
Condoms prevent STIs like HIV (T)	91%	9%
Washing with soap kills all harmful germs (F)	41%	59%
Bad hygiene leads to diahorrea in children which may cause them to die (T)	92%	8%