

MSE Radio Programme Listener Survey

Carried out by FIT-SEMA

September 2004

Background

ILO FIT-SEMA (Small Enterprise Media in Africa) is a two year project working in Uganda that was initiated on the 1st January 2004, funded by the Swedish International Development Co-operation Agency (Sida). The projects aims to establish channels of information and advice, platforms for discussion and debate, and an enhanced voice for advocacy for the informal, micro and small enterprise sector (MSEs) by facilitating the Ugandan commercial FM radio industry to establish interactive, investigative business programmes. The FIT-SEMA project aims to develop the media industry to develop and run programmes focused on small business and builds on activities initiated in 1999. By mid 2004, the project has resulted in the launch of 22 regular radio programmes on small business. These programmes are being run in 12 local languages on 18 radio stations across Uganda. While the programmes have a focus on small business, they also cover issues of agro-business and farming since this is an important income source and basis for business in Uganda.

Why Radio in Uganda?

There is no common uniting language in Uganda. Although English is the official language it is not spoken by the majority of people in the country and is particularly not understood at a technical level, i.e. to communicate technical or more complex messages. Local vernacular languages, of which there are 37, are therefore the only way to reach the majority in Uganda.

Adult literacy in Uganda was 68% in 2001 and is increasing, but Uganda generally remains a country with a weak reading culture, but with a strong oral culture. This is one of the driving forces behind the huge growth in broadcast media in Uganda. Circulation figures show that daily newspapers published on one day have a maximum reach of approximately 5.5% of the Ugandan adult population. Mostly the urban population is reached, and although some newspapers filter into the villages there is no planned rural distribution. Newspapers play an important role as they reach the urban, educated elite, which include policy makers, government, formal businesses, public civil servants and development employees. Also the content of the electronic media (TV and radio) is heavily influenced by newspaper. With only 6% of households owning a TV set and 9% of the population having any form of electricity the TV industry looks likely to grow slowly.

FM Radio is the giant in terms of reach, and the Uganda Bureau of Statistics suggest that 63% of households own a radio, while independent surveys indicate household radio ownership to be between 80 and 90%¹. In mid 2004 there were at least 84 operating radio stations in Uganda, but to effectively reach the large majority of Ugandans one would have to broadcast on at least 10 stations, due to languages and signal cover.

¹ Surveys by Steadman Research Services and ILO in 2003 and 2004

Survey Methodology

The FIT-SEMA project includes a substantial component of evaluating and documenting the impact that the small business radio programmes have on the MSE sector. The business radio programmes are routinely monitored and their content summarised and documented. This is the first of two listener surveys due to be carried out during this project, and it covered 3 regions of the country, and was followed by focus group discussions (FGDs) in these same areas, held with 249 listeners to these small business radio programmes. This report is a compilation of findings from these 3 different methods, however the main body of the findings is from the listener survey undertaken in June and July 2004. The main purpose of the survey was to answer the following questions:

- What is the reach of radio?
- Is small business radio listened to?
- Does small business radio reach the poor?
- Are the programmes used equally by both genders?
- Does listening to a radio programme benefit small business? If so how?
- What are the weaknesses of small business radio and what can be done to improve it?

Survey Population

Face to face interviews were carried out with 1111 people above the age of 15 years. Three areas of Uganda were selected in Central, Western and Eastern, covering 5 language areas of the country, Luganda, Rutooro, Ruchiga, Runyankole and Ateso. This area covered 9 radio stations broadcasting small business programmes, 5 are partners of the FIT-SEMA project, and 4 are copy cat programmes.

The survey area was defined to include both urban (34%) and rural (66%) populations, as well as a balance between male (58%) and female (42%) listeners. Interviewers also selected respondents who were above 15 years old. Half of those surveyed were between 25 and 35 years of age, with 21% being younger, and 20% between 35 and 45 years. Only 9% of those surveyed were above 45 years of age. Finally, as the survey was mainly carried out in working hours, the survey naturally pre-selected respondents who were not in the top 2 social classes of the population. During these times the majority of these social classes would be working, not at home or small business centres. Therefore of the 1111 respondents only 12 were in social classes A and B (See Annex 1 for social class definitions used).

When extrapolating listener levels the population in these 2 classes (A and B) was removed from the total population figures, together with the figures for those under 15 years, as the programmes did not target them. The numbers of people living in areas of the country not able to receive small business radio programmes were also removed from the national population (See Annex 2).

FINDINGS

1. What is the reach of radio and is small business radio listened to?

From the total survey sample, 94% were classified as radio listeners (they had listened for more than 30 minutes in the past week). There were no significant differences

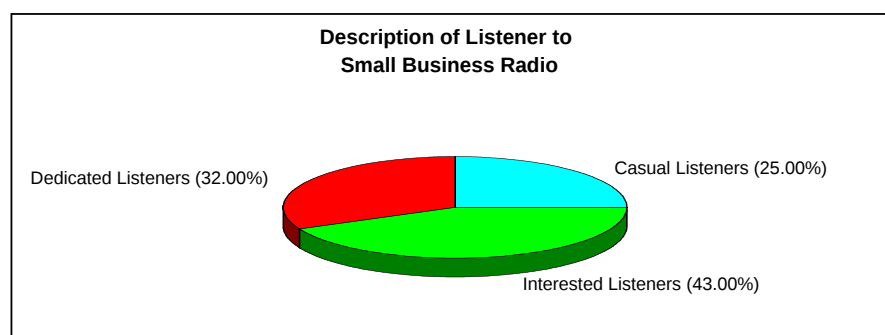
being found between genders and perhaps surprisingly between rural and urban populations.

The two major reasons cited by respondents for not listening to any radio was either that the respondent was too busy, or that they had no access to radio. There were more women and people living in rural communities who gave these as their reasons for not listening to radio. Other reasons given included: that the respondent did not like radio, that the household radio was broken or that it only played cassettes.

The 6% of the survey population who did not listen to radio for at least 30 minutes per week were taken out of the figures, bringing the total number of potential listeners to small business radio programmes down from 1111 to 1049. Of this number, i.e. those who are radio listeners, 80% were listeners to small business radio programmes.

Survey respondents were asked how they would classify their commitment as listeners to small business radio programmes. A casual listener was someone who only listened to these programmes when they happened to be tuning in to the radio station at that time. An interested listener would be someone who tuned into the programme whenever possible. A dedicated listener would try and schedule their time to avoid missing this programme. The pie chart below (Figure 1) shows, how people who responded to this particular question, categorised their listening habits to small business radio. Three quarters of listeners viewed themselves as either dedicated or interested listeners in the programme while only one quarter happened to listen just because they were listening to radio at the time the programmes were broadcast.

Figure 1



There was almost no difference in the commitment of the listeners between the genders, and only small differences between rural and urban listeners. 47% of urban listeners described themselves as interested listeners compared to 40% of rural listeners. 27% of urban listeners described themselves as dedicated listeners, whereas rurally a higher proportion, 35%, described themselves as dedicated listeners. In the central region where the programmes had been running longest and are particularly strong, 85% of radio listeners were able to name a small business programme they listened to.

Survey respondents were categorised with respect to their role in the small businesses. Of those who listened to the small business radio programmes the majority, 60%, owned or managed a small business, 13% were employed in a small enterprise and 6% were looking to establish their own enterprise.

The number of people over 15 years old, in social classes C, D and E, who had access to small business radio programmes countrywide, was over 9 million.

Of the total population surveyed 94% were radio listeners, and 74% were listeners to small business radio, based on the definition that they had listened to these programmes more than 4 times in the last 3 month. This indicated that there are 6.99 million listeners to small business radio programmes nationwide (see Annex 2). Of these listeners 75% described themselves as either committed or dedicated listeners. There were no significant differences between either gender or urban and rural populations in the numbers of listeners to these programmes. Nearly two thirds of listeners to these programmes were owners or managers of a small business themselves

2. Does small business radio reach the poor?

From the total survey population of 1111 the differences in listenership between the social classes was looked at. It was found that listenership to small business radio programmes was slightly lower in social class E (see Annex 1 for classification), at 67%, compared to over 75% of those in social classes C and D.

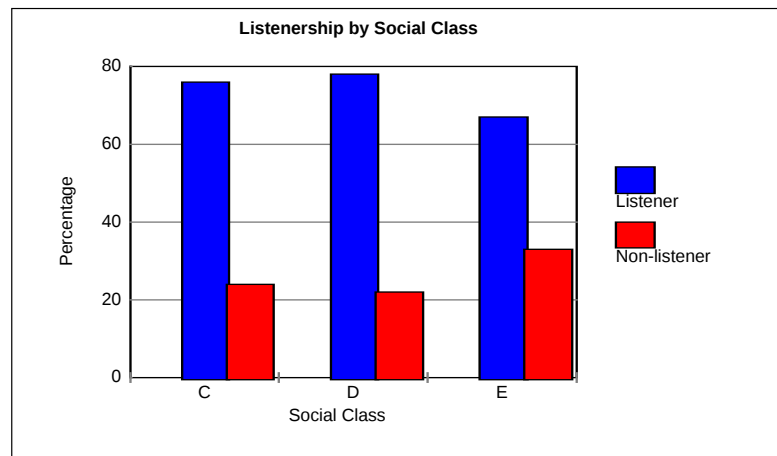


Figure 2. Listenership by Social Class, omitting classes A and B

It was also found in the survey that only 9% of households interviewed did not own a working radio, including the surveys carried out with residents of Internally Displaced People (IDP) camps where poverty levels were high. This gave household radio ownership figures of 91%, which is higher than that obtained by the Uganda Bureau of Statistics in the National Survey carried out in 2004 which cited that household ownership of radio was 64%. However the finding of this survey correlate with those obtained by Steadman Research Services in a survey from April 2004, who found that 93% of households owned a radio.

Despite 9% of the surveyed population not owning a working radio, only 6% did not listen to radio for at least half an hour a week, indicating that lack of ownership of a radio was not necessarily a barrier to listening. Listener levels were slightly lower in social Class E (see Figure 2), and this could be that either ownership levels of a working radio were lower in this group, or that they could not afford to get a broken

radio mended. Despite these possible difficulties with accessing radio almost two thirds of those surveyed in Class E listened to small business radio programmes.

The importance of small business radio to both rural and urban communities was emphasised by comments from FGD participants who categorised themselves as poor (see text box below). One listener stated that the timing was not ideal for him to “attend” the programmes, giving an indication of the importance he attached to the information he received. Farmers stated how they had learnt from the programmes about new crops and livestock, that the weather forecasts assisted them to plan, and how commodity prices aid decision making about which crops to plant, where to sell and how much for.

Rural listeners also mentioned that small business radio was an important method of keeping them in contact with changes going on around. Several listeners commented in FGDs that they are now “moving on at the same pace as others, and not being left backwards”, or that “radios assist ordinary people to become modernised”

- “Radio programmes have acted as schools where people learn without paying fees, teaching us on a whole range of things”
- “Many people who cannot afford newspapers can access radio. They learn and get information, and develop through the radio”
- “Radios educate all, and all can participate, not just the educated or those in towns”
- “Even the illiterate can receive knowledge and are assisted”
- “Everyone is equal on radio and the peasant farmers are not left out”
- “The ideas for small businesses makes us realise we can try and do something”

This indicates that small business radio is reaching at least two thirds of the poorest members of Ugandan society, and is highly valued as an educational tool by the poor. Listeners are not merely passive, but feel involved in the programmes and many put into practice what they hear on these programmes, for example saving their money, changing their farming practices and introducing crop rotation to increase yields. This makes small business radio programmes a very powerful development tool for reaching and impacting both rural and urban poor.

3. Are these programmes used equally by both Genders?

80% of radio listeners were listeners to small business radio programmes. There was no significant difference between male and female listeners. In some regions there was a slight gender difference between particular small business programmes favoured by women and those favoured by men. The reasons for this were not part of this survey.

In 45% of households radio listening was controlled by the male head of the household, whereas in only 19% of households control was with the female head of household. However only 5% said this had any impact on their listening habits. Possible reasons for the lack of control having little impact could be that, firstly, people were happy to listen to the same programmes, or secondly, that within their household there was more than one radio. Respondents were asked how many radios

there were in their household. It was found that 30% of households had more than one radio.

Respondents were asked how they perceived themselves as listeners to the small business radio programmes, and there was found to be little difference in responses between the genders. Slightly more women view themselves as casual listeners than men (29% and 23% respectively) and fewer as interested listeners (38% and 45% respectively), but the percent perceiving themselves to be dedicated listeners was the same. Fewer female listeners to these programmes were owners or managers of small businesses than male listeners. The most frequent reasons given for listening were to gain information and advice on how to run a small business, to be up to date with current business news and issues and to learn about new business opportunities.

- “These programmes help me know what businesses are suitable for a married women, rather than look at a man for everything”
- “The programmes tell us about very small businesses, so we can at least try to do something”
- (2 women from Eastern Uganda explaining how they benefit from small business radio)

There was a difference between the genders in one of the benefits obtained from listening to the programmes, and that was that a higher percentage of women than men felt they had benefited from learning about money management and how to save. Female listeners found hearing from other people working in small business more of a reason to tune in than male listeners.

General radio listenership and access is similar for men and women. Ownership and control of radio is not perceived to be a problem for the large majority. Women are equally using and benefiting from the programmes, although some radio programmes are more popular among women than others. There are some differences between the genders in both the benefits they obtain from these programmes, and in the reasons for listening in to the programmes.

“These programmes have led to gender balance. Before women never used to interact openly in business affairs, but today through these small business programmes women have come out boldly”
(Coffee buyer in Mukono)

4. Radio; Entertainment or Information?

4.a. What topics do listeners want airtime given to?

Survey respondents were asked whether FM radio stations were giving sufficient airtime to several issues. Figure 3 shows the responses given by those who expressed an opinion. The responses varied slightly with the different radio stations people had access to, but in all 3 regions the trends were the same.

Nearly half (between 44% and 47%) of respondents felt that not enough air time was devoted to information dissemination; health, agriculture, income generation and business issues. Only 6% felt that too much time was devoted to income generation and business programmes. This contrasts to responses given for both humour and music. Almost half (45%) of respondents who expressed an opinion stated that too much air time was devoted to music, with only 14% wanting more. Peoples responses to amounts of humour were similar. Listeners seemed to appreciate the religious

programmes, and overall were fairly neutral about the time given to both local and national politics.

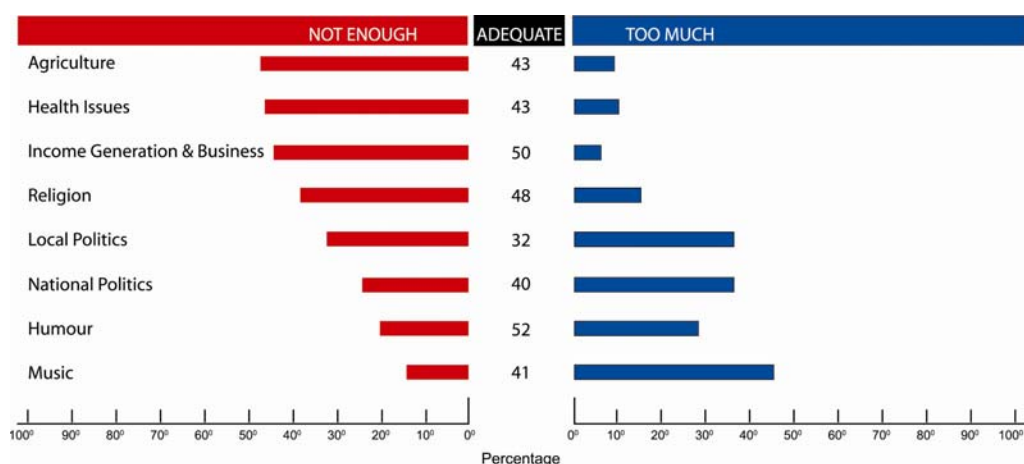


Figure 3. Perceptions of airtime given to radio programmes

These responses were echoed in the FGDs, where people were asked how they felt radio could be improved. Many responses were that the small business programmes should be longer, that “information was wealth” and listeners were being kept “up to date” by these information programmes. Many responses indicated that due to the health programmes they ate better, and were educated about diseases, so were able to avoid catching them. Listeners also cited how much they benefited from hearing other people’s business stories, which stimulated them to try new business ideas and practices.

“In the days of the internet it is very good that we, the villagers are not left behind.”
Comment from a rural listener on the importance of radio

Radio is viewed by listeners as far more than an entertainment media, that needs to provide them with humour and music. For many it is an education and information source, to which people are active listeners, putting into practice what they learn through the programmes. The examples from business people of their experiences were frequently stated to be an encouragement to others to try new ideas themselves.

4.b A role of Radio: Contributing to lobbying and advocacy

Several times during the FGDs participants stated that one role of small business radio should be to assist with lobbying and advocacy on behalf of listeners. Comments were made such as:

- “I would like these programmes to advocate on our behalf to reduce the taxes, because taxes are so high.”
- “... when you have a small business with high license fees it is impossible to continue with the business. I ask the radios to talk on our behalf.”
- “The council are charging us highly in taxes. We individuals have tried to complain, but in vain as we are not given any attention. We are taxed twice on the way before we reach market. I request the radio programme to pass information to the council.”

This concept, of radio as a tool for lobbying, was discussed only in one area of the country, around Fort Portal, where the small business radio programme has been successful in resolving some disputes between council and the small business community. Listeners noted an appreciation of the role that radio can play in acting as an intermediary to solve business problems. Some of the issues that had been addressed by the radio programmes on behalf of listeners are shown in the text box below. One participant in a FGD requested that radio programmes teach members of the small business community how to “get grouped so as to get more purchasing power and bargaining power”, seeing another possible benefit of these programmes.

Payment for coffee out growers: buyers who had contracts with coffee out growers were not paying farmers when promised, and fixed prices with little negotiation with the farmers. As the direct result of the programme, the farmers started receiving payments and the buyers asked to appear on subsequent radio programmes to help address the rift that had grown between them and their suppliers.

Parking Fees Dispute: Following the introduction of parking fees in Fort Portal taxi operators took to parking in the forecourts of filing stations, to avoid paying these fees, which they said were too high to keep their businesses viable. When police impounded these vehicles, tensions rose between taxi operators, police and town officials. The radio programme succeeded in getting representatives of police and council to explain on air the reasons for what was taking place. This led to the resolution of the dispute.

Dispute between livestock traders and an abattoir: When a conflict between livestock traders and an abattoir broke out the small business radio programme was able to investigate the traders complaints and highlight the problems that the traders faced. The issues of the abattoir operating as a commercial monopoly were highlighted and unfair trading practices of the abattoir were changed to fall in line with the operations of other abattoirs in Kampala.

Small businesses had benefited from small business radio programmes lobbying on their behalf, and issues had been resolved. Providing a voice for small businesses listeners felt was an important role for the small business radio programmes.

4.c. Benefits of these programmes to listeners

Respondents to the survey were asked about the perceived benefits of these programmes, as well any actual changes they had made in their businesses as a result of these programmes. Figure 4 below indicates the level of benefit these programmes have as perceived by small business owners.

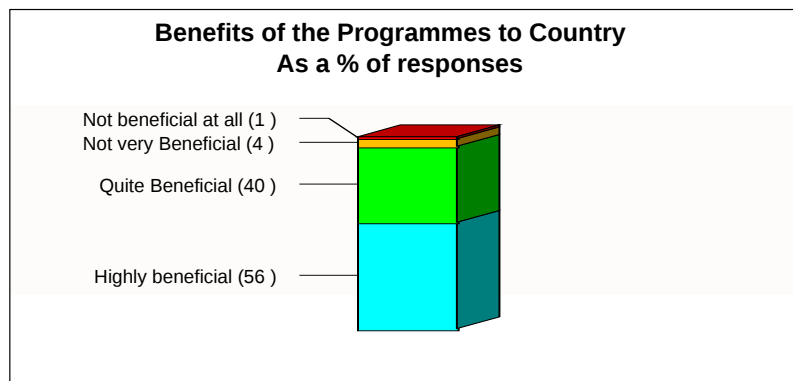


Figure 4; Level of benefit of the Small Business Radio Programmes to the country, as perceived by business owners.

56% of listeners felt the programmes were “highly beneficial”, with most of the rest stating that they were quite beneficial. These same listeners were then asked how beneficial the programmes were to themselves as business owners or managers, and responses were not significantly different. These findings were echoed by other categories of business people responding to the survey, those who were employed within a small business and those interested in establishing a small business. Responses did not differ significantly between the genders, or the urban and rural populations.

The perceived benefits to the business community from these programmes were many, and the major ones are given in Figure 5 below, with the numbers of times that the cited response was given by interviewees. From this it is clear that the information gained from small business radio was perceived to be of most benefit, as virtually all the responses given related to different types of information provided.

Provide information on how to run a small business	267
Provide information on markets and business opportunities	192
Provide business tips and advice	189
Provide information on current business news and events	116
Provide information on legal, tax and other policy issues:	63
Provide a voice for small business people to influence officials:	36
Other	9
Total number of responses	872

Figure 5: Perceived benefits of small business radio as stated by business owners

Respondents were then asked to give specific examples, not perceived benefits, of how these programmes have benefited small business people in Uganda. The major reasons cited were; that people obtain new skills and receive business advice, people are taught about the market, they are encouraged to create employment and they learn about savings.

Business owners and managers were then asked what impact these programmes had had on their businesses, if any, or what changes they had effected. The main responses given are shown below in Figure 6, with the number indicating the times that benefit was given.

My business has expanded by putting into practice what I learnt on radio	107
I am aware of the changing market situation and commodity prices	64
I have started my own business	61
My savings have increased	32
I have diversified my business	18
I now pay taxes to the right officials	17
I am growing/ breeding new crops/livestock	15
I started keeping accounts	14
Total Responses	328

Figure 6. Benefit of radio programme to business owner or manager

During the FGDs respondents were asked how these radio programmes had benefited their businesses. One of the most frequent given responses was that the commodity

price information assisted farmers with both planning what to grow and with selling. Listeners stated that their businesses had improved through advertising on these programmes, that they had learnt about their rights as workers as well as that they had found employment through these programmes. Producers had found new markets for their goods and business operators had been able to immediately effect changes in regulations (e.g. the removing of taxes on boda boda operators), due to information being broadcast.

“Through these programmes I have learnt to save income, not to be like my friends. I spend less from my earnings, the rest I save for future use.”(Bodaboda Operators Representative)

The programmes were perceived by the majority of business owners or managers to be either quite or highly beneficial to the small business community, with the provision of information of all types as being the major benefit. The actual benefits to these businesses as a result of these programmes were that they had expanded, or been started as a result of listening, and again the information was useful, particularly the commodity prices. This was echoed in the FGDs.

6. What are the Weaknesses of small business radio and what can be done to improve it?

There were several reasons given for not listening to the small business radio programmes that were echoed across both the survey and the FGDs. From the survey few people stated that the programmes had not benefited their businesses, but of those that did some of the reasons given were that topics were not covered in sufficient detail and that the presenter was hard to understand. This issue was raised again in the FGDs when people complained the presenter mixed languages, was not fluent in the language of the show, talked too much when there were expert studio guests, or was not sufficiently informed about the issues being discussed.

Respondents were asked about the timing of the programmes, and the survey showed that the majority of listeners felt the shows were on at appropriate times. However in the FGDs one of the main complaints was that the shows were on either too late at night for farmers, or during working hours when one could not listen. The survey respondents were asked about the length of time for the programmes. Apart from the Eastern region, where people felt the programmes were of adequate length, the general response was that the programmes were too short. This, people felt, meant that issues were not covered in sufficient detail, which at times meant they lacked sufficient information to put new ideas into practice. People stated several times in the FGDs that topics were never “followed up” at a later date by the presenters, which did not give them the opportunity to put new ideas into practice and gain more information on the same subject.

Generally respondents enjoy the listener feedback portions of the programmes and either felt feedback was sufficient or there could be more time devoted to it. Again this was echoed in the FGD where people requested longer shows simply to have time for phone calls from listeners and letters to be read out, or as one listener commented “we will die with our knowledge”. Again it was highlighted how people felt the stories and live interviews with other business people were one of the strongest points of these programmes.

Some of the other comments from the FGDs were:

- ◆ that there were too many advertisements, particularly consecutive adverts
- ◆ that the shows were not regular, did not always run on time and were not advertised, making it hard to plan to listen
- ◆ presenters were not always relevant to, or understood by, their target audience and they needed to do more research

It is clear that small business radio programmes do have an impact on those it reaches, but it is far from perfect. There are many issues still to deal with to improve the service to the small business community but the numbers committed listeners who can cite ways they have benefited from these programmes indicate that the programmes are providing a valuable service to this community.

Annex 1

Levels of wealth of listeners was gauged using the following proxies:

- ◆ Ownership of land
- ◆ Ownership of livestock
- ◆ Ownership of car/ motorbike/ bicycle
- ◆ Type of house lived in/ owned

From this data the following wealth classification was derived:

Class A: Owns a 4WD or luxury car less than 12 years old and owns a modern, brick house with at least 3 bedrooms

Class B: Owns more than 5 acres of land (for rural areas), lives in a brick and mbati or tile roofed house, with at least 2 bedrooms, owns a car or motorbike

Class C: Owns more than 2 acres of land, owns a motorbike or bicycle, but not a car, owns less than 50 cows, lives in a brick house with mbati or tile roofing

Class D: (fulfils at least 2 of the following parameters) Owns up to 2 acres of land, owns no car or motorbike but could own a bicycle, owns less than 10 local cows, lives in a house with mbati (non thatch) roofing

Class E: Owns no land, no cows, no transport and lives in a mud and grass thatched house

Annex 2

Listenership figures for Small Business Radio Programme

Total population of Uganda ¹		24,748,977
Areas not covered by radio programmes ¹		
Moroto District		170,506
Kotido District		596,130
Nakapiripit District		153,862
Kapchorwa District		193,510
Population not covered by radio programmes		1,114,008
Population reached by radio programmes		23,634,969
Total number of people over 15 years ²	50%	11,817,485
Estimated population in C,D and E social classes ³	80%	9,453,988
Listenership to the small business radio programmes	74%	6,995,951

¹ Figures from the Uganda National Household Survey carried out April 2004

² Figures from UNDP Human Development report 2003

³ Uganda National Survey, 2004