

Radio Sawa: Progress Report

Based on July-August 2003 surveys conducted by ACNielsen in Egypt, Jordan, Qatar, UAE, and Kuwait



September 2003



Where We Started

- Prior to Radio Sawa, VOA had a one-size-fits-all Arabic service for the entire Middle East delivered largely via ineffective short-wave with average weekly audience reach of just 1-2%.
- Meanwhile, a media war was raging in the region. Weapons included hate media, incitement to violence, disinformation, state censorship, and journalistic self-censorship.
- We saw the need to establish a credible channel of communication with Arab listeners, using proven private-sector broadcasting techniques to target the 70% of the region's population under 30.

Where We Started

- Our mission: to promote freedom and democracy through accurate and objective news and information -- in short, to be a free press in the American tradition.
- Our market: the most skeptical and anti-American in the world. While Arabs are drawn to the American values of individual choice and freedom, they fiercely oppose U.S. policies and are increasingly doubtful about our intentions in the region.
- Our challenge: to take our mission and make it resonate despite the market difficulties. We call it “marrying the mission to the market.”
- While we continue to build out the Radio Sawa network, research results just in from the region show that after just 18 months of broadcasting our strategy is working.

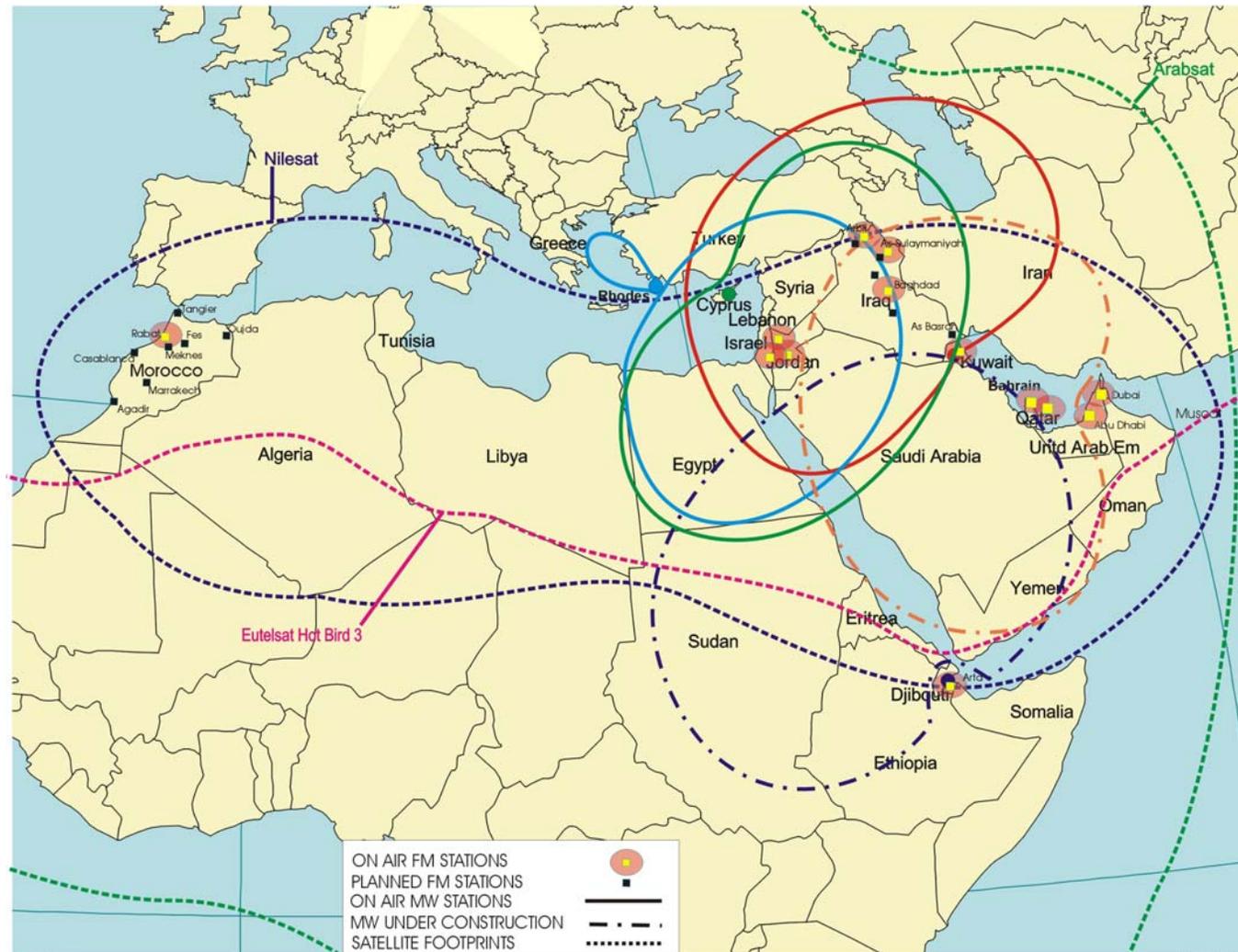


The Sawa Strategy

- Reach the largest possible audience for the news and information mission by attracting listeners with a unique Arabic-Western music format presented in a fresh, upbeat American style.
- Broadcast unvarnished, unbiased news.
- Cover U.S. policies and actions in full, including newsmaker interviews.
- Create customized programming streams for the different sub-regions of the Arab world.
- Engage the audience with dynamic, interactive features such as “Sawa Chat.”
- Become part of the daily lives of our listeners with the 24/7 presence of a modern radio station.
- Deliver the programming via the channels -- FM, AM, digital satellite -- that the audience uses and we control (while ensuring appropriate redundancy).



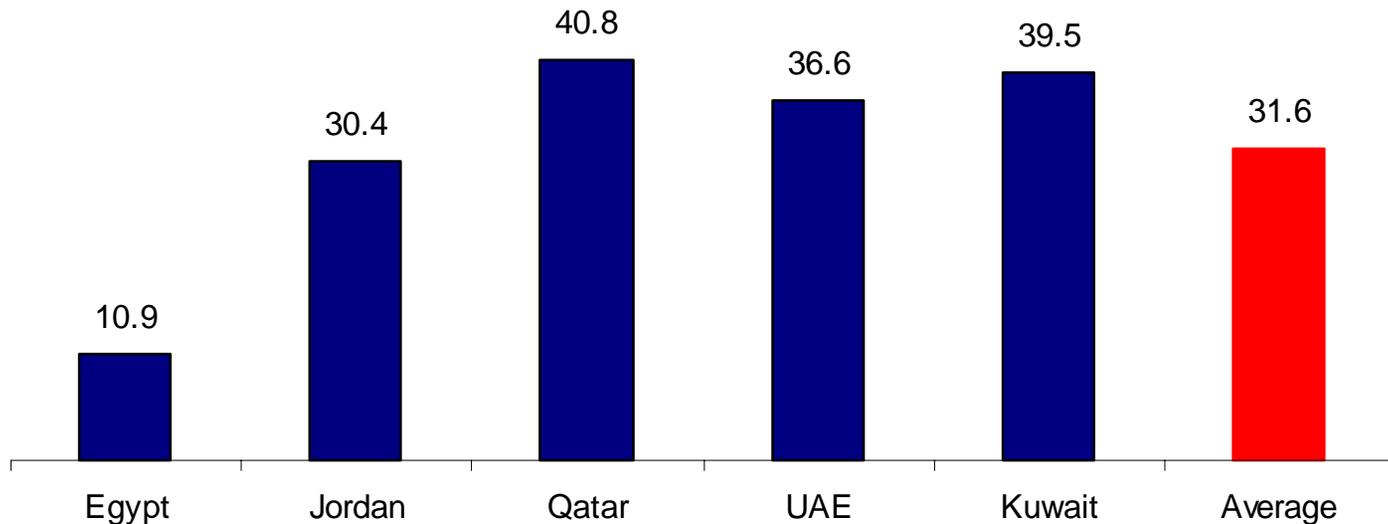
Radio Sawa Distribution Network



Radio Sawa Weekly Listenership

(% listening among the general population 15+)

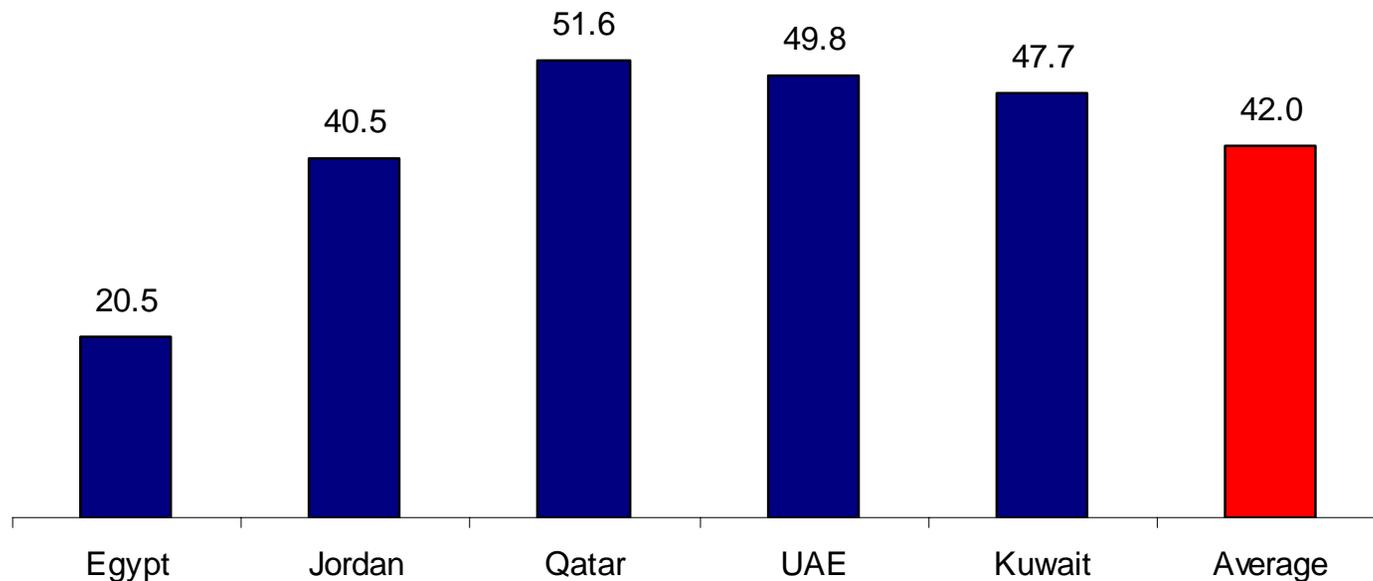
Radio Sawa is now the leading international broadcaster in each of these countries and competes head to head with the top domestic stations. (Radio Sawa reaches Egypt via AM and digital satellite audio only).



Radio Sawa Weekly Listenership

(% listening among the general population 15-29)

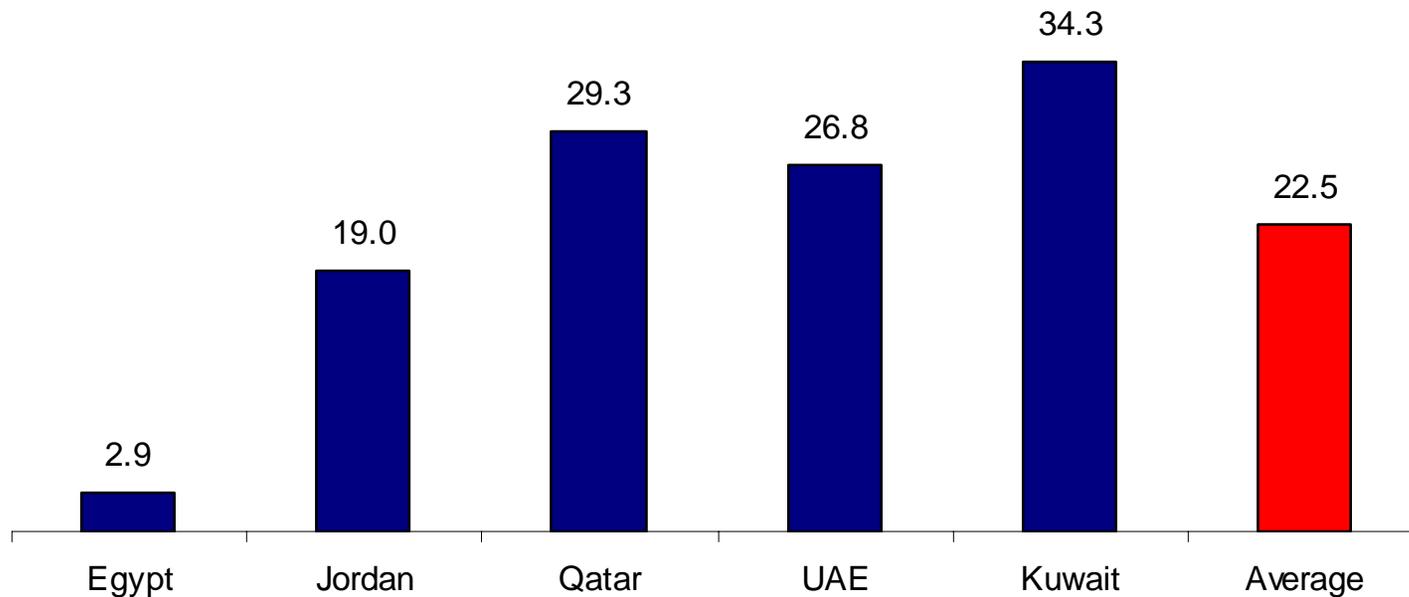
Radio Sawa is even stronger with its 15-29 core target audience.



Radio Sawa Weekly Listenership

(% listening among the general population 30+)

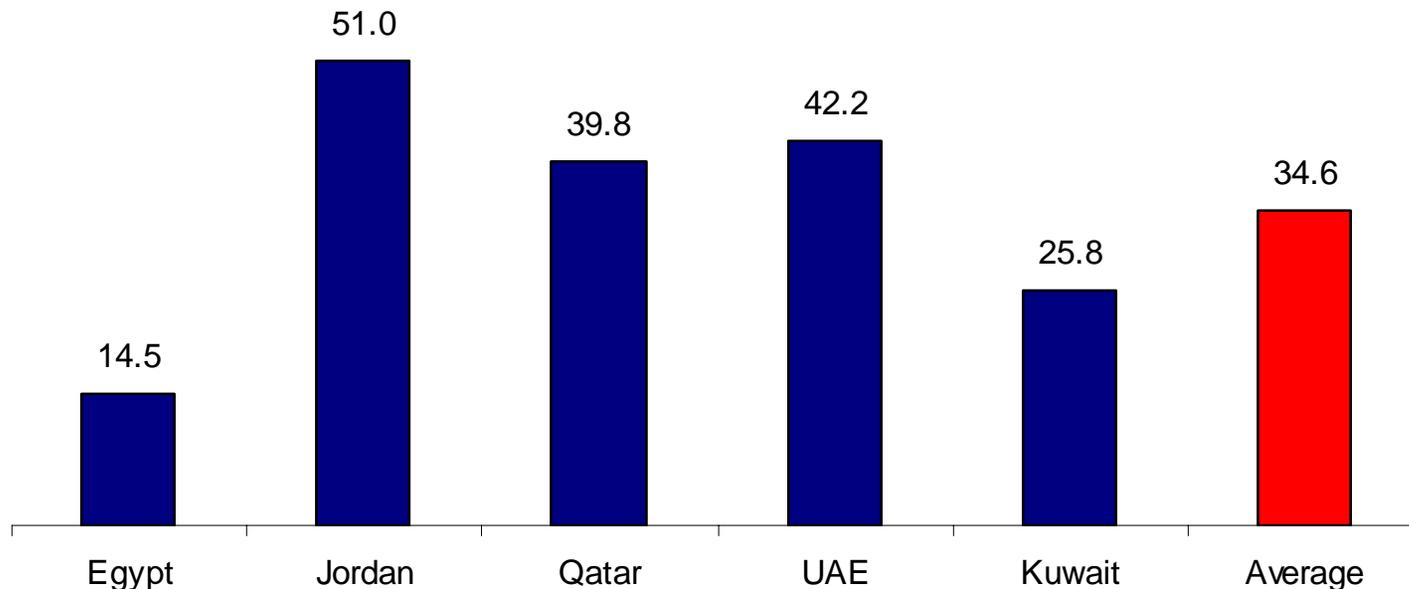
Radio Sawa goes well beyond its target, reaching substantial audiences above the age of 30.



Radio Sawa Weekly Listenership

(% listening among "elites" -- social classes "A&B")

Radio Sawa also delivers the elite listeners. Social classes 'A&B' refer to society's well-educated managers and professionals *per* the industry-standard A-E classification of the European Society for Opinion and Marketing Research (ESOMAR).

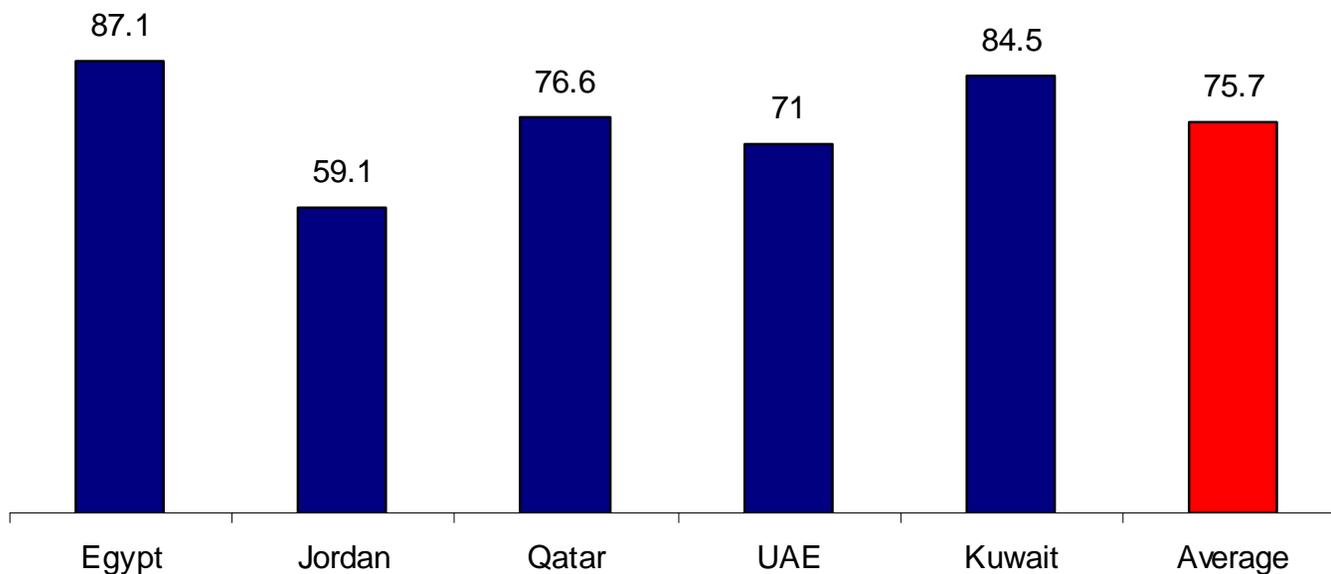


Radio Sawa as a Reliable News Source

Q. “How reliable is the news and information one can hear on Radio Sawa?”

% of weekly listeners answering ‘very or somewhat reliable’

Radio Sawa not only delivers large audiences but succeeds in fulfilling its core news mission.

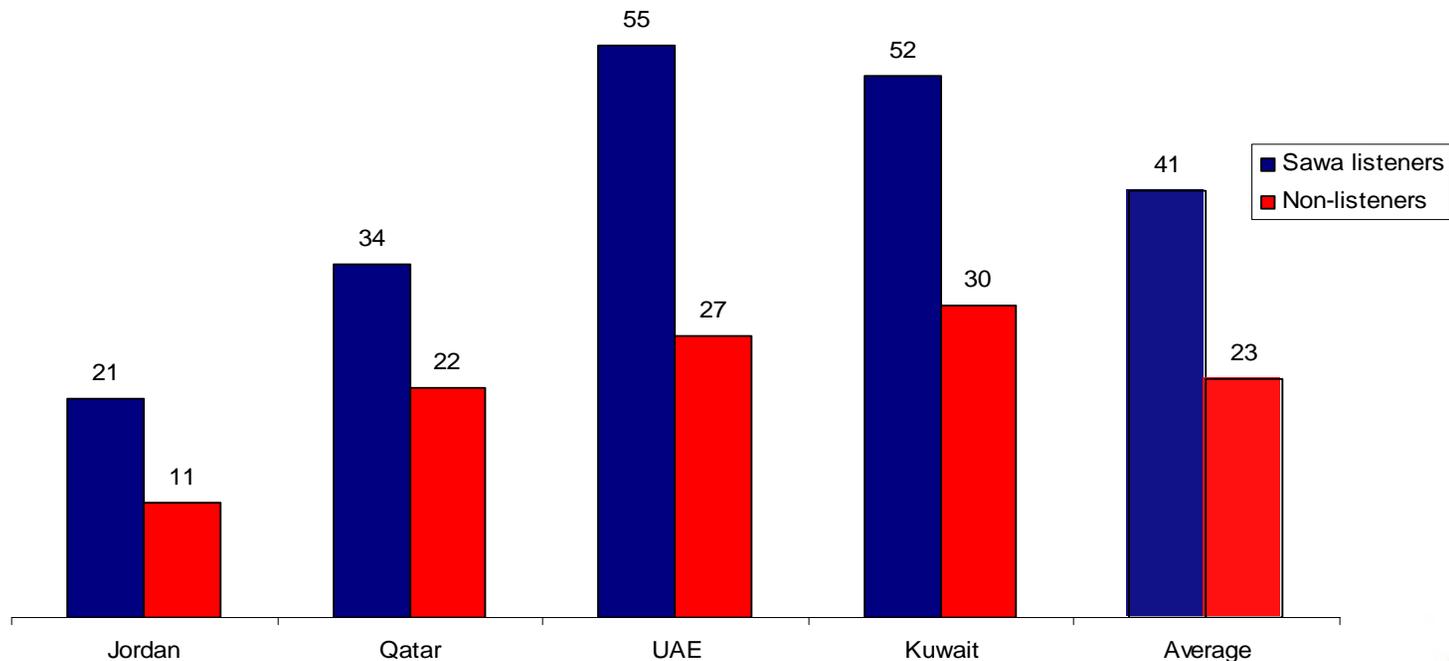


Views of the USA among Radio Sawa Listeners and Non-Listeners

Q. “How favorably or unfavorably inclined are you personally toward the USA?”

% responding ‘very’ or ‘somewhat favorable’ among weekly Sawa listeners and non-listeners

(Question not asked in Egypt because of political sensitivities)



Notes on the Research

- Face-to-face interviews conducted in Arabic July-August 2003.
- Sample size of 5737 adults 15+, distributed as follows: Egypt (1522), Jordan (1251), UAE (1200), Qatar (998), and Kuwait (768).
- 50% men and 50% women representative of key demographic groups in terms of social class, education, employment, size and type of household.
- Margin of error: +/- 2.9%.