

# Belarusian Broadcasting

Total Population of Belarus: 9.5 million

## A U D I E N C E C O M P O S I T I O N

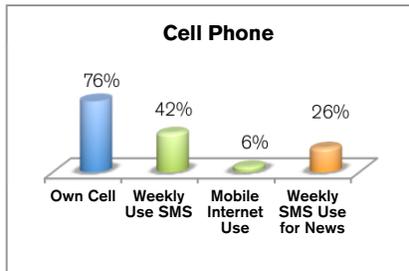
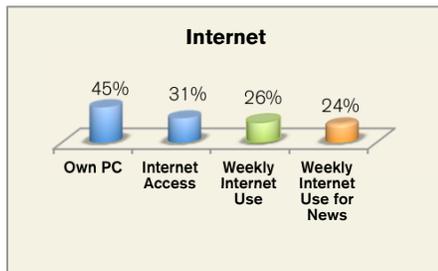
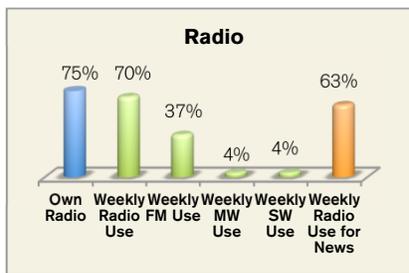
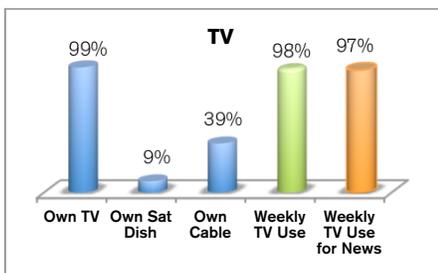
	Sample	RFE/RL Weekly Audience**
<b>Sex</b>	%	%
<b>Male</b>	46	na
<b>Female</b>	54	na
<b>Age</b>		
<b>15-24</b>	18	na
<b>25-34</b>	17	na
<b>35-44</b>	17	na
<b>45-54</b>	19	na
<b>55-64</b>	12	na
<b>65+</b>	17	na

	Sample	RFE/RL Weekly Audience**
<b>Education</b>	%	%
<b>None</b>	3	na
<b>Primary</b>	12	na
<b>Secondary</b>	62	na
<b>Coll./Univ.</b>	23	na
<b>Ethnicity/Nationality</b>		
<b>Belarusian</b>	86	na
<b>Russian</b>	9	na
<b>Other</b>	6	na

	Sample	RFE/RL Weekly Audience**
<b>Residence</b>	%	%
<b>Urban</b>	74	na
<b>Rural</b>	26	na
<b>Language</b>		
<b>Belarusian</b>	4	na
<b>Russian</b>	64	na
<b>Mix of Bel./Russ.</b>	32	na

\*\*Sample of weekly RFE/RL audience is too small for meaningful analysis.

## M E D I A U S E



### Top Ten Media Outlets

1. ONT
2. BT-1
3. RTR-Belarus
4. NTV-Belarus
5. LAD
6. STV
7. Belarus Radio 1
8. Mir
9. Radius FM
10. Discovery Channel

### Top Ten Sources of News

1. ONT
2. BT-1
3. NTV-Belarus
4. RTR-Belarus
5. Belarus Radio 1
6. SB Belarus Segodnya
7. Komolskaya Pravda
8. Euronews
9. www.tut.by
10. www.yandex.ru

### Web Analytics

**Weekly Visitors** 17,700  
**Weekly Visits** 106,100

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK**
- Alyaksandr Lukashenka, president since 1994, won re-elections in December 2010 with 79 percent of the vote, according to government officials. Following the election voters peacefully filled a large square in the center of Minsk in protest, claiming the election was a farce. Police violently attempted to break up the crowd and arrested more than 600 people, including seven of the nine opposition leaders.
- Following the election, protests and arrests both the European Union and the United States adopted sanctions against the country in an effort to punish Mr. Lukashenko.
- Belarus is experiencing the worst economic crisis since the collapse of the Soviet Union. With the sanctions in place, it has become isolated and looks to Russia for economic support.
- Since the December 2010 elections, seeing the EU and China have been wooing Belarus, Russia stepped up efforts to keep their neighbor close. The presidents of Russia, Belarus, and Kazakhstan established a Common Economic Space between the three countries, allowing for free flow of goods, capital, services and labor.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 99 (168/179)**
- President Lukashenka introduced a media law in 2008 that curtails press freedom by giving the state monopoly over both distribution and information about social, economic or political affairs. There is limited accessibility to private newspapers and the national television is wholly owned and controlled by the government. In 2009, the government enacted new legislation that makes criticism of the president and government a criminal offense, punishable by prison sentences or high fines.
- Censorship of all Internet activity continues as the government owns Belarus' only internet-service provider. Since June 2010, internet café owners are required to identify users and track their activities.
- Chapter97.org founder, Aleh Byabenin, a site that publishes independent analysis, passed away in September 2011. The circumstances of his death have been disputed but the site continues to operate. In October, Russian television networks were taken off the air and the government banned Russian-produced documentaries.

P R O F I L E



Voice of America



**Language of Broadcast:** Bosnian†  
**Content:** 2.75 hrs. of original TV programming per week; Internet  
**Distribution:** 15 affiliates (15 TV)  
**TV:** VOA's Bosnian Service's *Studio Washington* is broadcast by satellite and on 15 television stations throughout Bosnia-Herzegovina. VOA Bosnian also produces a weekly live-to-tape TV interactive for the nationally broadcast and top-rated BHT1 network. The interactive is part of the political and foreign affairs show *Global*, which airs Mondays at local prime time.  
**Web:** Multimedia content on web and mobile sites is updated daily. The Service's website features a *U.S. News in One Minute* digital only product, offers videos on YouTube and engages audiences via Facebook and Twitter.  
**Staff:** 4  
**Budget:** \$824,000  
**Established:** 1996 to present; TV service established in 1997

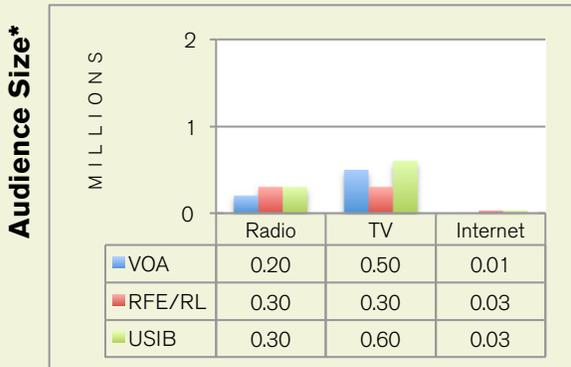


**Language of Broadcast:** Albanian to Kosovo, Bosnian, Macedonian, Montenegrin, and Serbian  
**Content:** Albanian to Kosovo: 10.5 hours original radio; Bosnian: 10.5 hours original radio; .5 hours TV; Macedonian: 7 hours original radio; 10 minutes TV; Serbian: 7 hours original radio Montenegrin: 3.5 hours original radio; Balkans Regional program: 12 hours original radio  
**Distribution:** 193 affiliates (150 FM, 43 TV) RFE/RL's delivery includes affiliates in Bosnia and Herzegovina (49 FM, 29 TV), Kosovo (37 FM), Macedonia (5 FM, 13 TV), Montenegro (12 FM), and Serbia (47 FM, 1 TV), in addition to HotBird and Internet with streaming audio.  
**Web:** All of the Balkan Services are active on Facebook and Twitter, have mobile sites, and have launched branded YouTube pages in process.

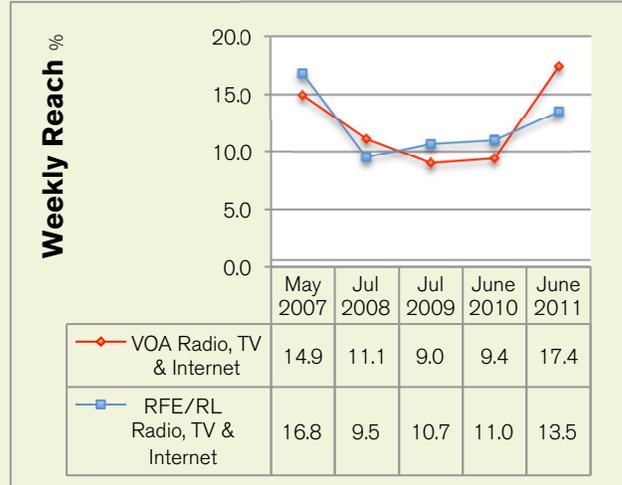


† Numbers reflect RFE/RL Balkans service totals which include Albanian, Bosnian, Macedonian, Montenegrin and Serbian.

P E R F O R M A N C E D A T A (Using Data from Bosnia, June 2011)



Weekly Reach by Media (%)			
	VOA	RFE/RL	USIB
Radio	5.8	8.1	10.0
TV	16.1	8.2	18.2
Internet	0.4	0.9	1.0
<b>Total</b>	<b>17.4</b>	<b>13.5</b>	<b>22.0</b>



Awareness (%)	
VOA	RFE/RL
78	79

Bosnian

Credibility	Percentage of surveyed weekly audience that finds broadcasts credible (%)	
	VOA	RFE/RL**
	Radio	95
TV	96	

Understanding	Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	VOA TV***	RFE/RL**	
	Current Events	96	90
	U.S. Society (VOA)/Current Events in Bosnia	90	88
U.S. Policies	75	na	

Quality	Combined Scores from audience panel	
	VOA	RFE/RL
	Radio	3.5
TV	3.1	na

\*Audience reaches and sizes for VOA and RFE/RL in Bosnia can only be meaningfully compared using figures for VOA content in Bosnian, Serbian, and Croatian. These audiences are .2 million for Internet. VOA total weekly reach is 21.2%, 7.1% for radio, 19.4% for TV and .6% for Internet.  
 \*\*Credibility and understanding ratings are for RFE/RL on any platform.  
 \*\*\*Understanding ratings for VOA Radio are 95% for Current Events, 79% for U.S. Society and 79% for U.S. Policies.

Data are from a June 2011 survey of adults (15+) in Bosnia

# Bosnian Broadcasting

## A U D I E N C E C O M P O S I T I O N

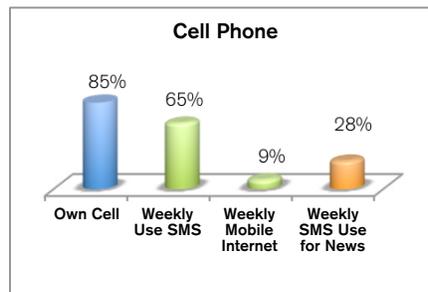
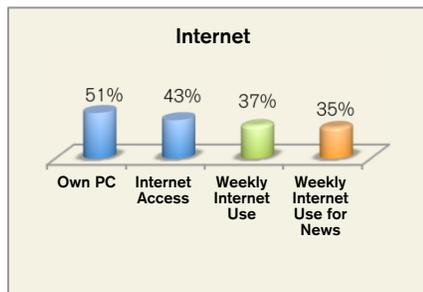
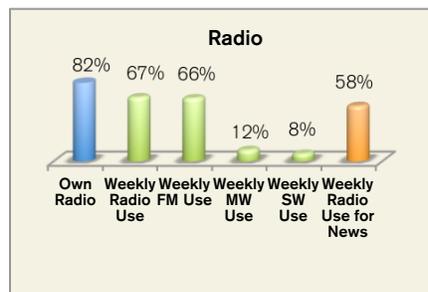
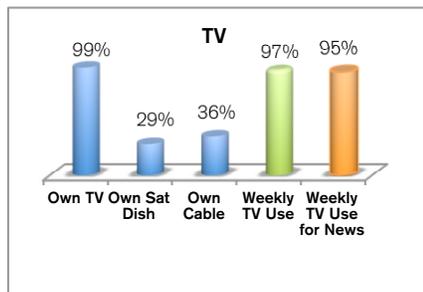
Total Population of Bosnia-Herzegovina: 3.8 million

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
<b>Sex</b>	%	%	%
Male	48	53	55
Female	52	47	45
<b>Age</b>			
15-24	19	11	11
25-34	17	14	12
35-44	17	19	19
45-54	16	20	17
55-64	14	18	21
65+	17	18	21

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
<b>Education</b>	%	%	%
None	3	2	2
Primary	22	18	20
Secondary	61	63	63
Higher	14	16	16
<b>Ethnicity/Nationality</b>			
Bosniak	49	66	64
Bosnian	2	4	3
Serbian	35	12	15
Croatian	12	17	15
Other	1	1	2

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
<b>Residence</b>	%	%	%
Urban	45	49	51
Rural	55	51	49
<b>Language</b>			
Bos/Ser/Cro	99	99	99
Other	1	1	1

## M E D I A U S E



### Top Ten Media Outlets

11. FTV
12. BHT
13. OBN
14. Pink BH
15. RTRS
16. TV BN
17. HRT
18. NTV Hayat
19. TV Nova
20. RTL Hrvatska

### Top Ten Sources of News

1. FTV
2. BHT
3. OBM
4. RTRS
5. Nova TV
6. TUBM
7. Dhevni Avaz
8. Pink BH
9. MTV Hayat
10. ATV Banga Luka

### Web Analytics

**VOA Weekly Visitors** 2,000

**Weekly Visits** 3,500

#### RFE/RL

**Weekly Visitors** 19,200+

**Weekly Visits** 52,500+

† Numbers reflect RFE/RL Balkans service totals which include Albanian, Bosnian, Macedonian, Montenegrin and Serbian.

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): PARTLY FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- The protracted talks on resolving the nearly year-long government crisis at the state level continued in August with attempts to reach agreement on forming ruling coalitions in three of the ten cantons of larger entity of Bosnia and Herzegovina (BiH), the Bosniak (Bosnian Muslim)-Bosnian Croat Federation. The negotiations have brought together the two dominant forces in the Federation government, the Social Democratic Party of BiH (SDP BiH) and the Party of Democratic Action (SDA), both of which are supported predominantly by Bosniaks—although the SDP BiH is not an ethnically based party—and the two main opposition groups, the Croatian Democratic Union of BiH (HDZ BiH) and the Croatian Democratic Union 1990 (HDZ 1990), representing Bosnian Croats. The dispute over the governments of the three cantons, Herzegovina-Neretva, Herceg-Bosna and Central Bosnia, has become a stumbling block in the attempts to form a ruling coalition at the state level in order to replace the outgoing government, which has been operating in a caretaker capacity since the elections of October 2010.

### Media Environment

- **Freedom House Press Freedom Index (2011): PARTLY FREE**
- **Reporters Without Borders Index (2011): 19.50 (58/179)**
- The media environment of Bosnia and Herzegovina is divided along ethnic lines and these divisions color news reporting. For example, at the beginning of the fieldwork period much discussion was devoted to the planned (and then canceled on May 13) referendum in Republika Srpska to discontinue recognizing the national-level judiciary. In the middle of the fieldwork period, on May 26, the arrest of the former Bosnian-Serb military commander Ratko Mladic also sparked heated media coverage. For the past several years, qualitative research has shown that domestic media report these types of divisive events through a highly ethnically colored frame, which drives many Bosnians to international broadcasters for more balanced coverage.
- Domestic media outlets continue to suffer severe sustainability problems. With the effects of the economic crisis still having a strong hold on Bosnia, media outlets cannot free themselves from control of business interests or ethnically-aligned political parties. Bosnia's three public broadcasters (the nationwide BHRT and the entity units RTFBiH and RTRS) are under pressure from lost license fee income and the entire system continues to be marred by ethnic rivalry. Survey results show that the population seems to share the pessimistic outlook of media experts cited above: two in five (39 percent) noted incidences of hate speech in the media in the past year.
- Al-Jazeera Balkans was launched in November 2011 and the channel has the potential to become a strong competitor for regional and international news.

P R O F I L E



Voice of America



**Language of Broadcast:** Burmese

**Content:** 24.5 hrs. of original and 31.5 hrs. of repeat radio programming per week; 3 hrs. of original and 4 hrs. of repeat TV programming per week; Internet

**Distribution:** 1 TV affiliate, Satellite TV, 2 affiliate FM stations in Thailand, 1 MW, 5 IBB SW frequencies, Satellite audio and TV on AsiaSat.

**Radio:** The Service's programming is available on one MW, 5 IBB SW frequencies, 2 affiliate stations on the Thai border, as well as satellite audio.

**TV:** VOA Burmese programming is available on IBB satellites (AsiaSat 3 and IOR) and a local affiliate in southern Thailand near the border. Affiliate Sangkhalaburi Cable puts the entire package of VOA TV programming, including VOA English and other languages, on 24/7 to local households.

**New Media:** The Service maintains a website and the VOA Burmese Blog, is available on YouTube, Twitter, Facebook and sends out an e-mail newsletter to more than 5000 subscribers. A mobile site is available for smartphone users.

**Staff:** 13 **Budget:** \$2,205,000

**Established:** 1943 to 1945; 1951 to present



**Language of Broadcast:**

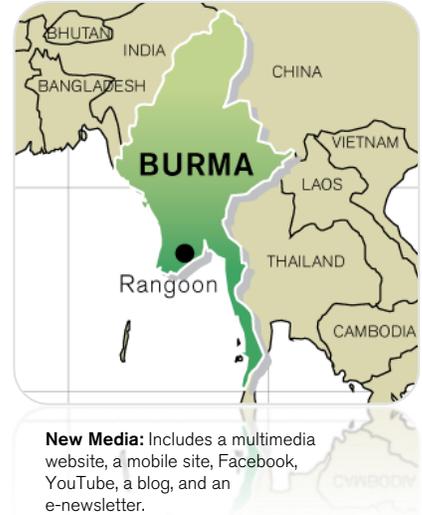
Burmese, Chin, Kachin, Karen, Karenni, Mon, Rakine, Shan

**Content:** 14 hrs. of original and 14 hrs. of repeat radio programming per week; 2.5 original and 1 hr. repeat television per week; Internet

**Distribution:** Satellite TV; 1-3 IBB SW frequencies; satellite rebroadcasting; 4 FM guerrilla stations operating clandestinely inside Burma; Satellite audio

**Radio:** The Service broadcasts 2 hours of original news programs daily and 2 hours of repeat.

**Video:** The Service produces a 30 minute daily television newscast, 5 days per week with repeats on the weekends.



**New Media:** Includes a multimedia website, a mobile site, Facebook, YouTube, a blog, and an e-newsletter.

**Staff:** 18

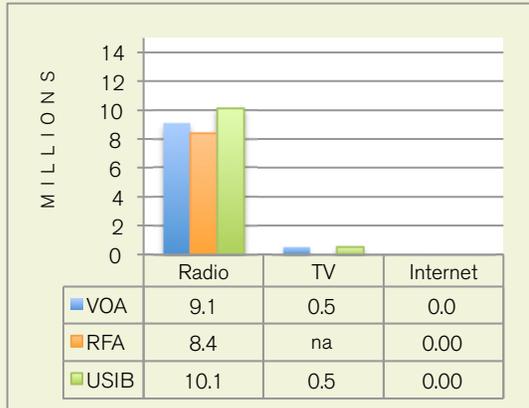
**Budget:** \$2,208,000

**Established:** 1997 to present

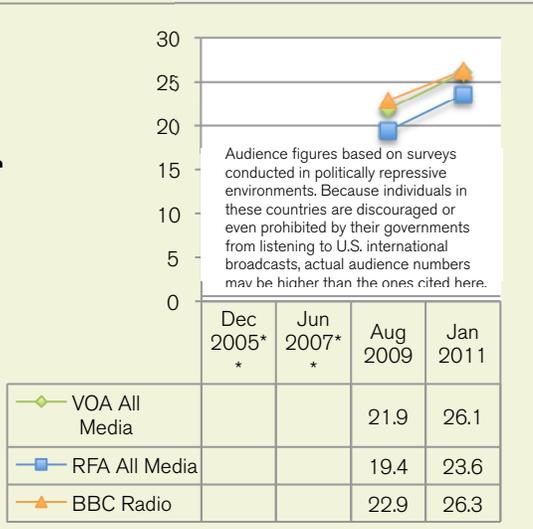
P E R F O R M A N C E D A T A

(Using Data from Burma, January 2011)

Audience Size



Weekly Reach %



Weekly Reach by Media (%)

	VOA	RFA	USIB
Radio	25.7	23.6	28.4
TV	1.5	na	1.5
Internet	0.0	0.0	0.0
Total	26.1	23.6	28.8

Awareness (%)

	VOA	RFA
	84	80

Burmese

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

	VOA	RFA
Radio	94	97
TV	94	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)\*\*\*

	VOA	RFA
Current Events	91	91
U.S. Culture (VOA) or Current Events in Burma (RFA)	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA	RFA
Radio	3.1	3.1
TV	3.8	na

\*Due to differences in the sample areas and in weighting among recent surveys, trend data are not available.

\*\* Dates reflect sub-national surveys; trending not possible with sub-national surveys.

\*\*\*Understanding question not asked for reasons of political sensitivity.

Data are from a January 2011 survey of adults (15-64) in Burma.

# Burmese Broadcasting

Total Population of Burma: 54 million

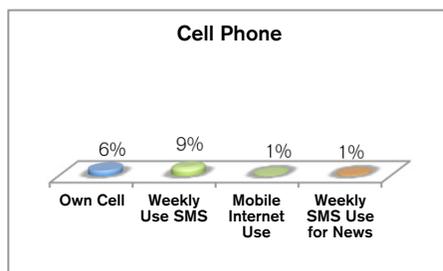
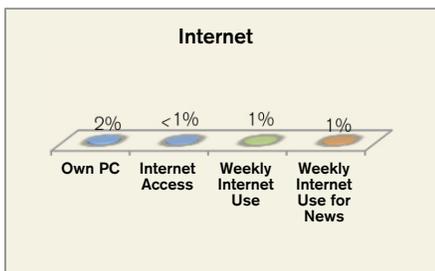
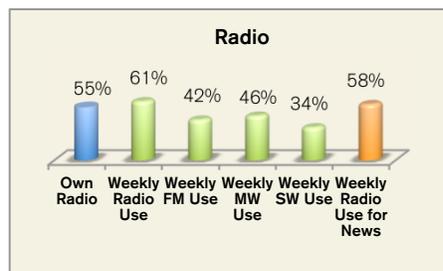
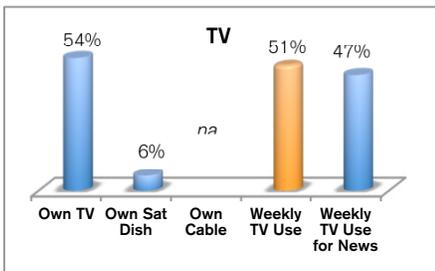
## A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Aud.	RFA Weekly Aud.
<b>Sex</b>	%	%	%
Male	48	64	66
Female	52	36	34
<b>Age</b>			
15-24	29	23	23
25-34	24	24	24
35-44	22	23	24
45-54	16	18	17
55-64	10	12	12
65+	na	na	na

	Sample	VOA Weekly Aud.	RFA Weekly Aud.
<b>Education</b>	%	%	%
None/Monastic/Primary	43	39	38
Middle	26	26	26
High School	18	21	21
Higher	14	14	15
<b>Ethnicity/Nationality</b>			
Bamar	70	73	73
Shan	6	5	4
Karen	6	8	8
Rakhine	4	4	5
Other	14	10	10

	Sample	VOA Weekly Aud.	RFA Weekly Aud.
<b>Residence</b>	%	%	%
Urban	31	25	26
Semi-urban	69	75	74
<b>Language</b>			
Burmese	77	79	79
Other	24	21	21

## M E D I A U S E



### Top Ten Media Outlets

1. Myanmar National Radio
2. MRTV
3. Myawaddy TV
4. Myanmar Radio Padauk Myay
5. BBC Radio
6. VOA Radio
7. RFA Radio
8. Mandalay City FM
9. Myanmar Radio FM 98.0 Yangon
10. MRTV 4

### Web Analytics

<b>VOA</b>	
<b>Weekly Visitors</b>	41,400
<b>Weekly Visits</b>	137,300
<b>RFA</b>	
<b>Weekly Visitors</b>	39,300
<b>Weekly Visits</b>	89,200

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- In the last year, Burma has undergone unprecedented changes culminating in the April 1, 2012 parliamentary by elections in which Aung San Suu Kyi and her NLD party won all but three available seats.
- President Thein Sein and other reformists in the government have pledged that the country will not back-slide but continue to progress to a fully democratic state. However, hardliners in the government could impede progress if they feel the country is changing too quickly.
- China, previously Burma's greatest international backer, was dealt a blow when Burmese authorities stopped work on a major hydro-electric dam project funded by the Chinese. The dam was intended to supply China with power, but also presented serious environmental issues and was unpopular with local residents.
- Additionally, the country faces numerous challenges from ethnic fighting and Chinese pressure to extreme poverty and corruption.
- Western governments have welcomed changes, major figures including Hillary Clinton have visited the country and the World Bank has announced it will open an office in Burma.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 100.00 (169/179)**
- Burma's Ministry of Information is drafting a new media law to present to the Parliament this session which is expected to increase the ability to exercise freedom of expression. The draft law includes plans for a "Press Counsel" which could prove a hindrance to free media if it is placed under the control of the government.
- In the meantime, the government's Press Scrutiny and Registration Division continues to censor print news media, and all broadcast media remain under the control of the government or cronies close to the government.
- The Internet is not restricted or censored in any way, but speed and expense limit its effectiveness and penetration. This is an area that could see substantial growth if the government allows the sector to develop as a free market.
- Exile and international media are now being granted access to the country and a number are opening offices.

P R O F I L E



**Language of Broadcast:** Cantonese  
**Content:** 14hrs. of original radio programming per week; 0.2 hrs. of original and 0.25 hrs. or repeat TV programming per week; Internet  
**Distribution:** 1 affiliate (TV); 1 IBB MW and 2 SW freqs.  
**TV:** VOA Cantonese's program, *American Report*, is carried on ATV Hong Kong and AsiaSat3 for 5 minutes a week. ATV is one of two terrestrial broadcasters in Hong Kong and is available via satellite in parts of southern China.  
**Radio:** VOA Cantonese has two radio affiliates in Hong Kong and two in Australia.  
**Web:** The Service has a website with audio, video and podcasts; a mobile site; and is available on Facebook, Twitter and has a YouTube page.  
**Staff:** 7  
**Budget:** \$986,000  
**Established:** 1941 to 1945; 1949 to 1963; 1987 to present

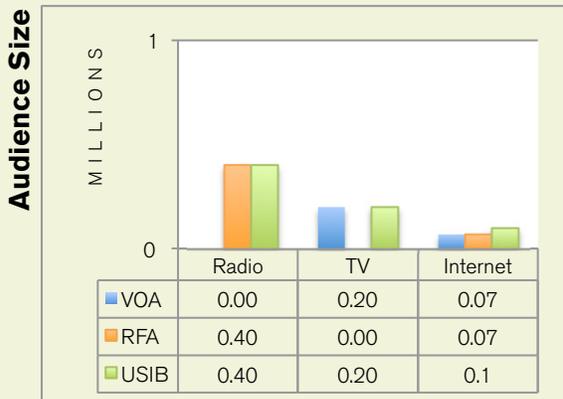


**Language of Broadcast:** Cantonese  
**Content:** RFA broadcasts 7 hrs. of original and 7 hrs. of repeat radio programming per week; Internet  
**Distribution:** 1-3 IBB SW frequencies; Satellite rebroadcasting  
**Radio:** The Service broadcasts 1 hour of original program and 1 hour of repeat daily.  
**Video:** The Service website features photos and video footage from inside the target area on a daily basis.  
**New Media:** The Service has web and mobile sites. It pioneered the use of Skype for call-in shows. It has Facebook, Twitter and YouTube pages. Newsletters are sent on a daily basis.

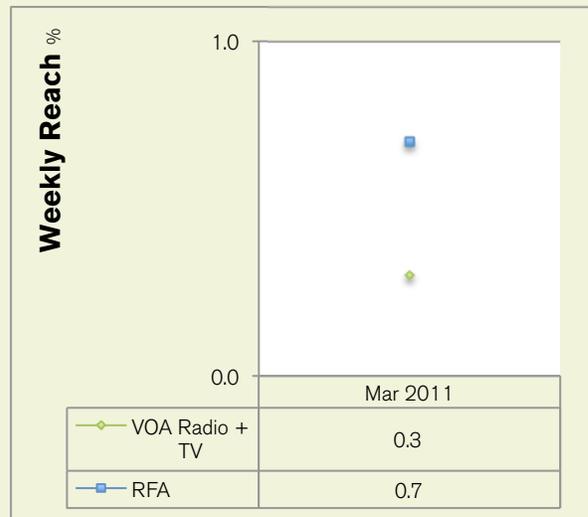


**Staff:** 6  
**Budget:** \$963,000  
**Established:** 1998 to present

P E R F O R M A N C E D A T A (Using Data from Guangdong Prov., March 2011)



Weekly Reach by Media (%)			
	VOA	RFA	USIB
Radio	0.0	0.6	0.6
TV	0.3	na	0.3
Internet	0.1	0.1	0.2
<b>Total</b>	<b>0.3</b>	<b>0.7</b>	<b>1.1</b>



Awareness (%)	
VOA	RFA
7	4

Credibility	Percentage of surveyed weekly audience that finds broadcasts credible (%)	
	VOA	RFA
Radio	na	na
TV	na	na

Understanding	Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
	VOA	RFA
Current Events	na	na
U.S. Culture (VOA) or Current Events in Guangdong (RFA)	na	na
U.S. Policies	na	na

Quality	Combined Scores from audience panel	
	VOA	RFA
Radio	3.1	3.4
TV	3.4	na

\*Samples of VOA and RFA weekly viewers and listeners in the survey are too small for meaningful analysis.

Data are from a March 2011 survey of adults (15+) in Guangdong Province, China.

Cantonese

# Cantonese Broadcasting

## A U D I E N C E C O M P O S I T I O N

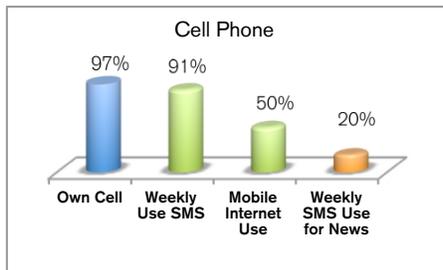
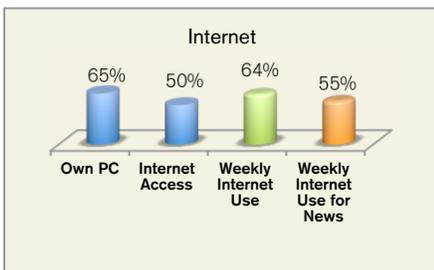
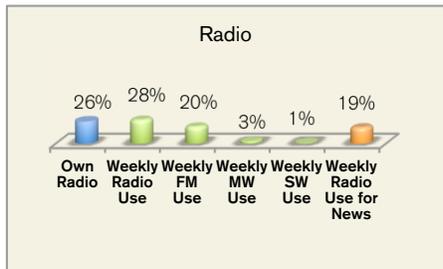
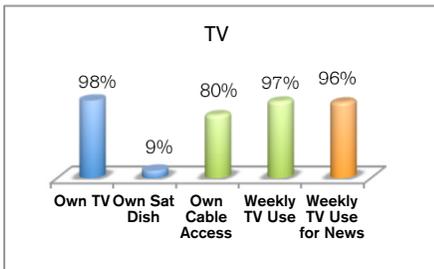
Total Population of Guangdong: 104 million

	Sam.*	VOA Weekly Aud.*	RFA Weekly Aud.*
<b>Sex</b>	%	%	%
<b>Male</b>	49	na	na
<b>Female</b>	51	na	na
<b>Age</b>			
<b>15-24</b>		na	na
<b>25-34</b>	24	na	na
<b>35-44</b>	25	na	na
<b>45-54</b>	23	na	na
<b>55-64</b>	20	na	na
<b>65+</b>	6	na	na

	Sam.*	VOA Weekly Aud.*	RFA Weekly Aud.*
<b>Education</b>	%	%	%
<b>Primary or less</b>	16	na	na
<b>Jr. School</b>	25	na	na
<b>High School</b>	32	na	na
<b>Vocational</b>	19		
<b>Coll./Univ.</b>	8	na	na
<b>Ethnicity/Nationality</b>			
<b>Han</b>	99	na	na
<b>Other</b>	< 1	na	na

	Sam.*	VOA Weekly Aud.*	RFA Weekly Aud.*
<b>Residence</b>	%	%	%
<b>Urban</b>	54	na	na
<b>Semi-urban</b>	11	na	na
<b>Rural</b>	35	na	na
<b>Language</b>			
<b>Mandarin</b>	40	na	na
<b>Cantonese</b>	11	na	na
<b>Other</b>	48	na	na

## M E D I A U S E \*\*



### Top Ten Sources of News

1. CCTV1
2. Local TV
3. Provincial TV
4. CCTV News
5. HK/Taiwan/Macau TV
6. TencentQQnews.com
7. Baidu.com
8. Sina.com
9. CCTV5
10. People's Daily

### Web Analytics

<b>VOA</b>	
<b>Wkly. Visitors</b>	1,200
<b>Wkly. Visits</b>	1,900
<b>RFA</b>	
<b>Wkly. Visitors</b>	3,500
<b>Wkly. Visits</b>	4,600

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE (China)**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK (China)**
- The southern Chinese provinces of Guangdong and Guangxi where most Cantonese speakers reside are relatively affluent provinces where many of China's major manufacturing and trading firms are based. Bordering Hong Kong, Guangdong has a population of 110 million and a GDP of \$689 billion, outstripping Saudia Arabia, Poland, South Africa and Argentina in both.
- With a huge internal migrant population, overcrowding in major cities and massive job creation requirements, internal stability is the Chinese government's primary political concern. China routinely subjugates human rights and legal protections under the banner of social stability.
- Social dislocations resulting first from rapid growth and, more recently, from factory closings and layoffs, have made Cantonese-speaking areas the center of a large number of high-profile civil actions, including the recent land dispute in rebel village Wukan.
- The average standard of living has increased markedly since the late 1970's and studies including the 2011 BBG survey indicate most Cantonese are satisfied with the state and direction on Chinese society. However, environmental pollution and public health are areas where Cantonese express significant dissatisfaction.
- Citizens of Cantonese-speaking Hong Kong enjoy considerably better political rights and civil liberties than do citizens of mainland China. In its report 2010 Freedom House classified Hong Kong as "Partly Free."

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE (China)**
- **Reporters Without Borders Index (2011): 136.00 (174/179)**
- Cantonese-speaking areas of China are at the forefront of China's rapidly changing media environment. In the BBG's 2011 survey, 64% of Guangdong's adults used the Web weekly and half of the total population access the internet by mobile phone.
- CCTV continues to be the top news source in Guangdong, but Hong Kong stations also have considerable penetrations and are valued sources of information. Satellite dish ownership in Guangdong is 9 percent and, as elsewhere in China, roughly 90 percent of satellite owners live in rural areas.
- Nearly 24 million Guangdong residents use microblogs regularly. As elsewhere in China, Facebook and Twitter are blocked, but domestic sites such as Sina Weibo and QQ provide forums for discourse on sensitive issues.
- Mobile internet access is not merely an urban phenomenon: 3G mobile networks have allowed the internet to penetrate into rural China even faster than the expansion of internet infrastructure into those areas.

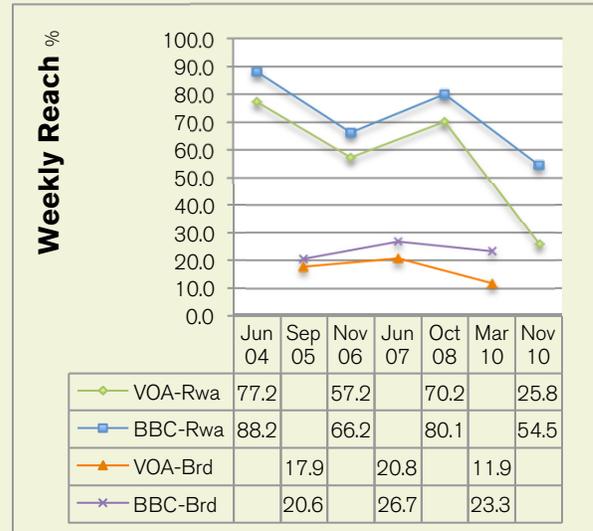
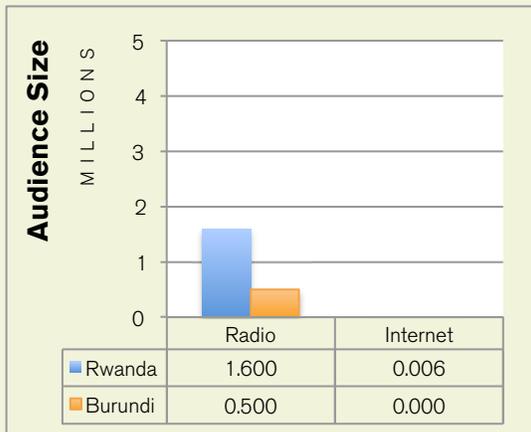
P R O F I L E



**Language of Broadcast:** Kinyarwanda & Kirundi  
**Content:** 7 hrs. of original radio programming per week; Internet  
**Distribution:** 3 affiliates (3 FM), 3 SW frequencies, 1 IBB FM in Kigali  
**Radio:** In addition to its shortwave broadcasts, VOA's Central Africa Service programs are simulcast on the VOA 24-hour FM frequency in Kigali, Rwanda. All programs, broadcast in Kirundi and Kinyarwanda, are also simulcast on FM by VOA affiliate stations in Burundi and Rwanda, and they are on medium wave on Radio Free Africa located in Mwanza, Tanzania.  
**New Media:** The service has a website, an email newsletter and is on Facebook, YouTube and Twitter.  
**Staff:** 9  
**Budget:** \$1,116,000  
**Established:** 1996 to present



P E R F O R M A N C E D A T A (Using Data from Burundi March, 2010 & Rwanda November, 2010)



Weekly Reach by Media (%)		
	Rwanda	Burundi
Radio	25.8	11.9
TV	na	na
Internet	.1	0
<b>Total</b>	<b>25.8</b>	<b>11.9</b>

Awareness (%)		
	Rwanda	Burundi
	79	40

Credibility		
Percentage of surveyed weekly audience that found broadcasts credible (%)		
	Rwanda	Burundi
Radio	90	80
TV	na	na

Understanding		
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	Rwanda	Burundi
Current Events	85	79
U.S. Culture	64	36
U.S. Policies	67	46

Quality		
Combined Scores from audience panel		
	Rwanda	Burundi
Radio	3.3	3.3
TV	na	na

Data are from a March 2010 nationwide survey of adults (15+) in Burundi and an November, 2010 nationwide survey of adults (15+) in Rwanda.

# Kinyarwanda & Kirundi Broadcasting

A U D I E N C E C O M P O S I T I O N Total Population of Burundi 10.2 M and Rwanda 10.9 M

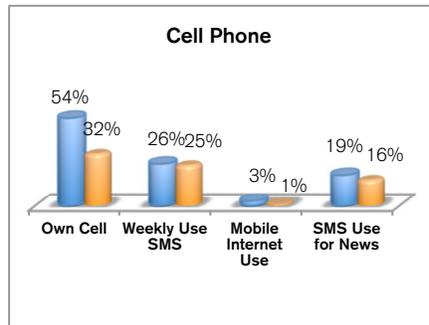
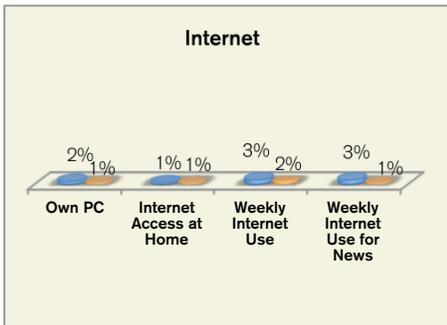
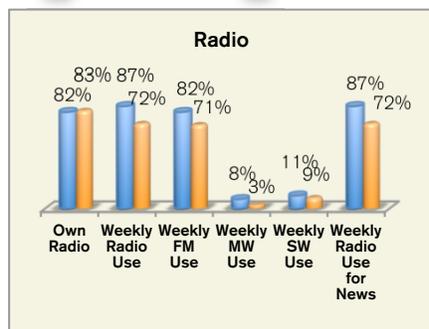
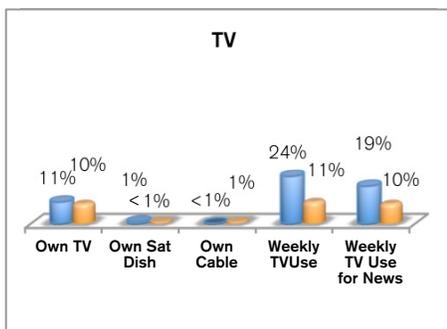
	Rwd. Sam.	Rwd. Wkly. Aud.	Bur. Sam.	Bur. Wkly. Aud.
<b>Sex</b>	%	%	%	%
Male	48	67	49	73
Female	52	33	51	27
<b>Age</b>				
15-24	26	26	30	17
25-34	30	34	28	33
35-44	17	18	20	34
45-54	12	11	12	12
55-64	8	7	6	4
65+	7	3	5	1

	Rwd. Sam.	Rwd. Wkly. Aud.	Bur. Sam.	Bur. Wkly. Aud.
<b>Educ</b>	%	%	%	%
None	25	13	16	3
Primary	62	65	39	20
Sec.	11	17	33	47
Higher	2	5	10	27
<b>Ethnicity/Nationality</b>				
Burundian	na	na	98	96
Other	na	na	2	4

	Rwd. Sam.	Rwanda Wkly. Aud.	Bur. Sam.	Burundi Wkly. Aud.
<b>Residence</b>	%	%	%	%
Urban	12	12	12	21
Semi-urb.	na	na	7	13
Rural	88	88	81	66
<b>Language Spoken at Home</b>				
Kinyar.	100	100	<1	0
Kirundi	0	0	97	96
Swahili	0	0	1	2
Other	na	na	2	2

## MEDIA USE

■ Rwanda ■ Burundi



### Top Ten Sources of News (Rwanda)

1. Radio Rwanda
2. BBC
3. Radio Salus
4. TV Rwanda
5. Radio Maria
6. VOA
7. Community Radio Butare
8. Radio Izuba
9. Community Radio Gisenyi
10. Imvaho Nshya

### Top Ten Sources of News (Burundi)

1. RTN Burundi
2. Bonesha FM
3. Radio Public Africaine
4. Radio Isanganiro
5. BBC
6. RTNB
7. Radio Kwizera
8. Radio Ava Maria
9. VOA
10. Radio BINUB

### Web Analytics

<b>Weekly Visitors</b>	2,500
<b>Weekly Visits</b>	7,000

## C O N T E X T

↓ **Stability**    
 ↓ **Political Freedom**    
 ↓ **Press Freedom**    
 ↓ **Ease of Distribution**    
 ↓ **Competition**

### Political Situation

- **Freedom House Political Freedom Index (2011): Rwanda—NOT FREE; Burundi—PARTLY FREE**
- **Economist Intelligence Unit Instability (2010): Rwanda—MODERATE RISK; Burundi—HIGH RISK**
- In 2011, as in the past number of years, Rwanda failed to make much political progress in terms of democratization and judicial reforms. While several laws were drafted to advance political freedom, arrests of opposition party figures and government critics belied true reforms. Local elections in the spring of 2011 mainly saw the ruling RPF's candidates win seats.
- The political situation in Burundi has not stabilized in 2011. There were multiple fatal clashes between members of the dominant CNDD-FDD and opposition groups—many of whom had fled to neighboring countries following the 2010 elections which they boycotted. In reaction to a particular violent incident in September 2011 the government ordered a month-long media blackout and further restricted civil society activities.

### Media Environment

- **Freedom House Press Freedom Index (2011): Rwanda—NOT FREE; Burundi—NOT FREE**
- **Reporters Without Borders Index (2011): Rwanda—81.00 (156/179); Burundi—57.75 (130/179)**
- Rwanda's media environment was ranked the third least free in Africa in October 2010, after pressure on media outlets increased surrounding the August 2010 national elections. This challenging environment makes international broadcasters' work all the more difficult and important.
- Despite improving economic conditions, access to television and Internet remain low—only 11 percent of adults have a TV at home; only 7 percent have ever gone online. Opportunities for international broadcasters to reach audiences via these platforms are very limited.
- Mobile phones have become more viable as a means of reaching Rwandans; slightly more than half of adults have access to a phone at home. However, most transmission of news via mobile phone happens between friends and family, rather than between news organizations and audience members.

P R O F I L E



**Language of Broadcast:** Creole

**Content:** 14.5 hrs. of original radio programming per week; Internet

**Distribution:** 13 affiliates (13 FM)

VOA Creole broadcasts to Haiti via 13 local FM affiliate stations throughout the country. The Service also delivers news and information on its website, on social media platforms Twitter, Facebook, and You Tube, as well as via SMS through a local mobile provider. The Service provides training for Haitian journalists and has a citizen journalist program.

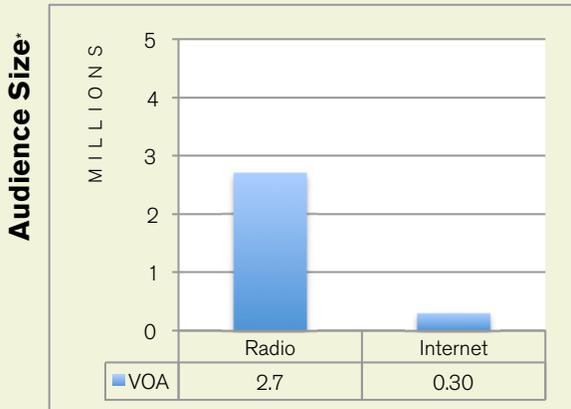
**Staff:** 8

**Budget:** \$1,674,000

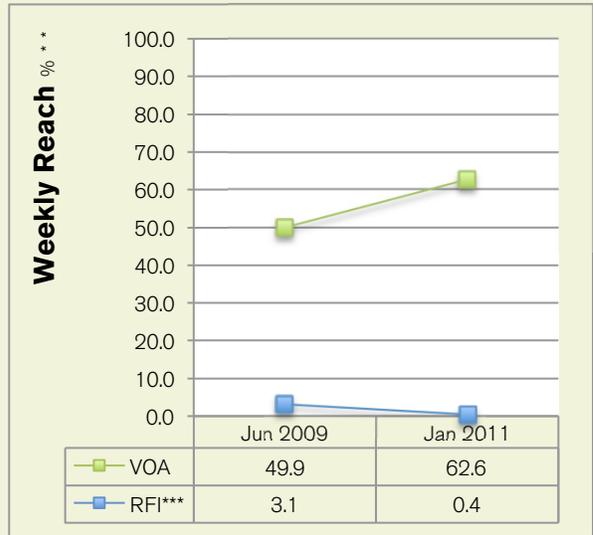
**Established:** 1987 to present



P E R F O R M A N C E D A T A (Using Data from Haiti, January 2011)



Weekly Reach (%) by Media	
VOA	
Radio	62.1
TV	na
Internet	5.7
<b>Total</b>	<b>62.6</b>



Awareness (%)	
VOA	
	93

Creole

Credibility	
Percentage of surveyed weekly audience that finds broadcasts credible (%)	
VOA	
Radio	97
TV	na

Understanding	
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
VOA	
Current Events	91
U.S. Culture	62
U.S. Policies	59
Current Events in Haiti	94

Quality	
Combined Scores from audience panel	
VOA	
Radio	3.7
TV	na

\*Audience size estimates are based on 2003 Haitian census 2011 projections put the 18+ population are 29% higher.  
 \*\* Due to differences in sample coverage between the June 2009 nationwide survey and previous urban-only surveys conducted in Haiti, it is not possible to show trend data from earlier surveys.  
 \*\*\* RFI's Creole content in 2011 was available online only.

Data are from a January 2011 survey of adults (15-64) in Haiti. The national sample is representative of the population 18 years of age and older living in Ouest, Grand Anse, Nippes, Sud Est, Sud, Artibonite, Centre, Nord, Nord Est and Nord Ouest. An additional sample was drawn of the camps located in the metropolitan areas of Haiti.

# Creole Broadcasting

Total Population of Haiti: 10.1 million

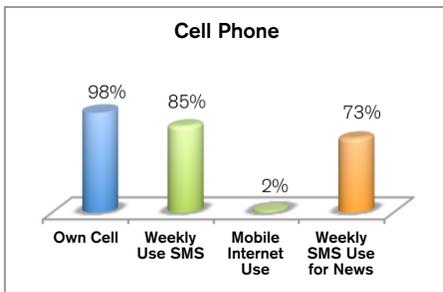
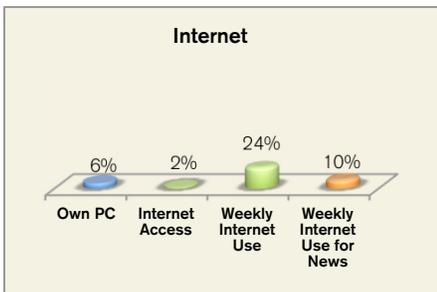
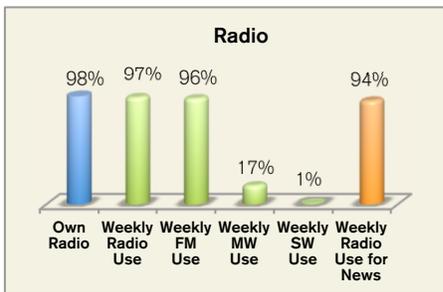
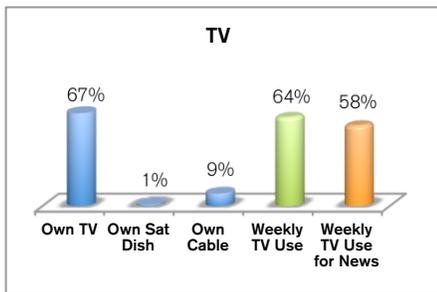
## A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Audience
<b>Sex</b>	%	%
<b>Male</b>	47	49
<b>Female</b>	53	51
<b>Age</b>		
<b>15-24</b>	18	15
<b>25-34</b>	36	36
<b>35-44</b>	24	26
<b>45-54</b>	16	17
<b>55-64</b>	5	5
<b>65+</b>	2	2

	Sample	VOA Weekly Audience
<b>Education</b>	%	%
<b>None</b>	6	4
<b>Primary</b>	23	25
<b>Secondary</b>	53	50
<b>Technical</b>	13	17
<b>Higher</b>	4	4
<b>Ethnicity/Nationality</b>		
<b>Haitian</b>	100	100

	Sample	VOA Weekly Audience
<b>Residence</b>	%	%
<b>Urban</b>	46	45
<b>Rural</b>	54	55
<b>Language</b>		
<b>Creole</b>	99	99
<b>French</b>	1	1

## M E D I A U S E



### Top Ten Media Outlets

11. Radio Tele Ginen
12. Radio Lumiere
13. Radio Vision 2000
14. VOA
15. Radio Nationale d'Haiti
16. Radio Metropole
17. TV Nationale d'Haiti
18. RFI Haiti relais FM
19. TNH
20. Radio Maxima

### Top Ten Sources of News

1. Radio Tele Ginen
2. VOA
3. Radio Lumiere
4. Radio Vision 2000
5. Tele Ginen
6. TV National d'Haiti
7. Tele Caraibes
8. Radio Nationale d'Haiti
9. Radio Metropole
10. Le Nouvelliste

### Web Analytics

<b>Weekly Visitors</b>	1,200
<b>Weekly Visits</b>	4,100

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): PARTLY FREE**
- **Economist Intelligence Unit Instability (2010): VERY HIGH RISK**
- The extreme weakness of Haiti's governing institutions has kept the political environment unstable. Violent protest and the difficulty of establishing a new government have been the main threats to progress rebuilding the country. Reconstruction activities—which have been on hold since late 2010 because of election campaigns—have restarted only gradually and will not pick up in earnest until a new prime minister and cabinet are approved by parliament.

### Media Environment

- **Freedom House Press Freedom Index (2011): PARTLY FREE**
- **Reporters Without Borders Index (2011): 15.67 (52/179)**
- Mobile phones have become an essential communication tool in Haiti. Almost every adult in Haiti has a mobile phone in their household (98 percent) and 97 percent own a personal phone. Before the quake, 90 percent of households had a mobile phone. Mobile ownership has increased; landline ownership has significantly decreased. Less than 1 percent of respondents now have a working landline; 3 percent of respondents had a landline before the earthquake.

P R O F I L E



Voice of America



**Language of Broadcast:** Dari

**Content:** 42 hrs. of original radio prog. per week; 3 hrs. of original TV prog. per week; Internet

**Distribution:** 1 affiliate (1 TV), 1 IBB MW, 8 IBB FM, 2 or 3 IBB SW frequencies

VOA delivers radio programming, seven days per week, on FM, AM, and IBB shortwave. The FM is broadcast to Kabul, Herat, Kandahar, Mazar-e-Sharif, Jalalabad, Khost, Gardaiz, and Kunar. IBB shortwave is heard in Afghanistan, Pakistan, Iran, Tajikistan and Uzbekistan.

VOA's Afghan news program, TV Ashna, is televised live throughout Afghanistan on RTA, Afghanistan's state-owned television network. The first half hour is in Dari; the second in Pashto. On Fridays, RTA also airs "Karwan," a 30 minute program targeted at youth.

**Staff:** 21

**Budget:** \$2,953,500

**Established:** 1980 to present



**Language of Broadcast:** Dari

**Content:** 42 hrs. of original radio programming per week; Internet

**Distribution:** Delivery includes 1 national MW, 8 IBB FM transmitters, multiple SW frequencies, HotBird, AsiaSat, Yamal and Internet with streaming audio (Dari site plus Pashto site).

**Staff:** 26+

**Budget:** \$5,030,000+

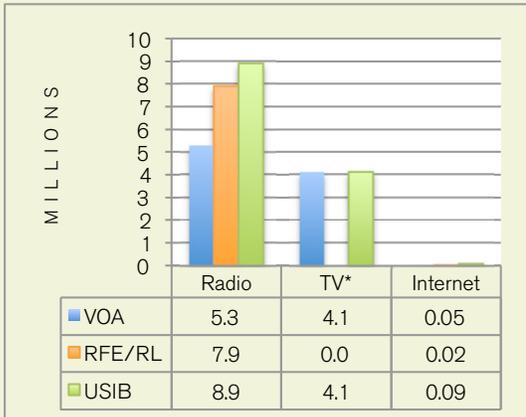
**Established:** 1985-1993; 2002 to present

† Totals for Radio Free Afghanistan including both Dari and Pashto broadcasts.



P E R F O R M A N C E D A T A (Using Data from Afghanistan, July 2011)

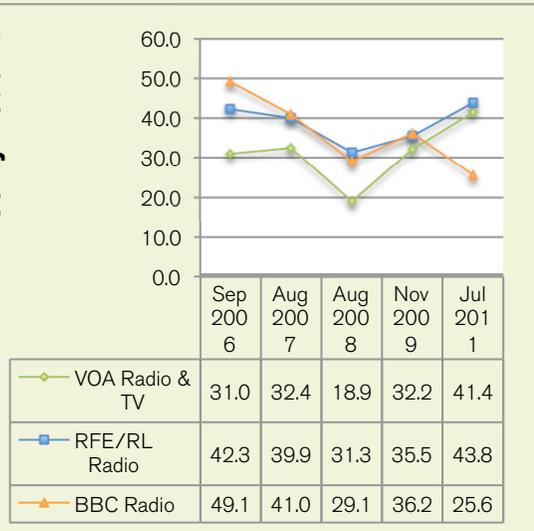
**Audience Size**



**Weekly Reach by Media (%)**

	VOA	RFE/RL	USIB
Radio	29.4	43.8	49.4
TV	22.7*	na	22.7*
Internet	0.3	0.1	0.5
Total	41.4	43.8	56.4

**Weekly Reach %**



**Awareness (%)**

VOA	RFE/RL
67	81

**Credibility**

Percentage of surveyed weekly audience that finds broadcasts credible (%)

	VOA	RFE/RL
Radio	87	85
TV	95	na

**Understanding**

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA Radio*	RFE/RL
Current Events	92	90
U.S. Culture (VOA) or Current Events in Afghanistan (RFE/RL)	80	88
U.S. Policies	65	na

**Quality**

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.4	2.8
TV	na	na

\*Viewing in "Dari only" or "Dari and Pashto"

\*\*Understanding ratings for VOA TV are 95% for Current Events, 80% for U.S. Culture and 67% for U.S. Policies.

Data are from a July 2011 survey of adults (15+) in Afghanistan.

Dari

## A U D I E N C E C O M P O S I T I O N

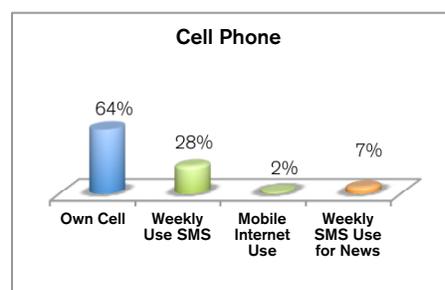
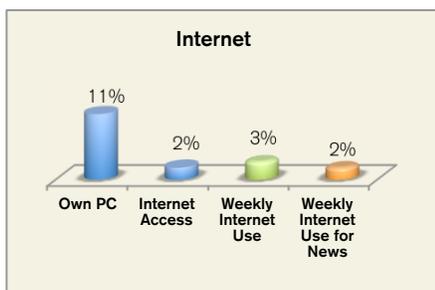
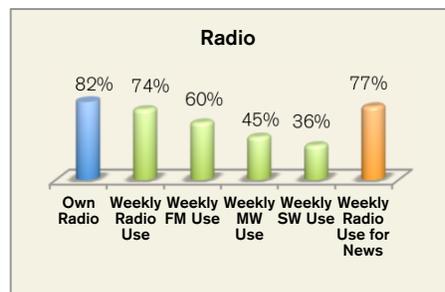
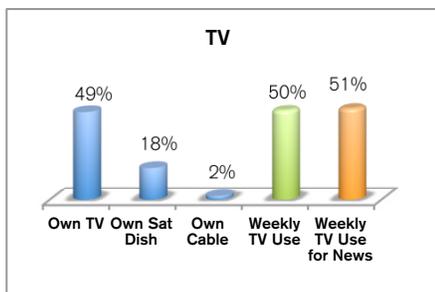
Total Population of Afghanistan: 32.4 million

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
<b>Sex</b>	%	%	%
<b>Male</b>	58	56	60
<b>Female</b>	42	44	40
<b>Age</b>			
<b>15-24</b>	31	33	31
<b>25-34</b>	23	21	23
<b>35-44</b>	22	23	21
<b>45-54</b>	15	13	15
<b>55-64</b>	7	8	8
<b>65+</b>	2	2	3

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
<b>Education</b>	%	%	%
<b>Illiterate/No Formal</b>	61	53	56
<b>Elem./Inter.</b>	18	21	18
<b>Secondary</b>	17	21	20
<b>Coll./Univ.</b>	3	5	6
<b>Ethnicity/Nationality</b>			
<b>Pashtun</b>	42	30	32
<b>Tajik</b>	36	43	43
<b>Uzbek</b>	9	11	10
<b>Other</b>	14	16	15

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
<b>Residence</b>	%	%	%
<b>Urban</b>	78	66	76
<b>Rural</b>	22	34	24
<b>Language</b>			
<b>Dari</b>	48	60	59
<b>Pashto</b>	39	26	29
<b>Uzbek</b>	9	12	10
<b>Other</b>	3	2	2

## M E D I A U S E



### Top Ten Media Outlets

1. RFE/RL Radio (any language)
2. Radio Afghanistan
3. VOA Radio/TV (any language)
4. TV Afghanistan
5. Tolo TV
6. Ariana TV
7. BBC Radio (any language)
8. Radio Ariana
9. Radio Arman
10. Lemar TV

### Top Ten Sources of News

1. Tolo TV
2. RFE/RL
3. TV Afghanistan
4. VOA
5. BBC
6. Ariana TV
7. Radio Afghanistan
8. Radio Arman
9. Lemar TV
10. Ariana Radio

### Web Analytics

<b>VOA Weekly Visitors</b>	5,600
<b>Weekly Visits</b>	14,400
<b>RFE/RL Weekly Visitors</b>	5,900
<b>Weekly Visits</b>	21,100

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): VERY HIGH RISK**
- In 2011, the legitimacy of the government led by the president, Hamid Karzai, remained compromised as a result of the flawed nature of the electoral process in both the 2009 presidential poll and the 2010 parliamentary elections. The president has been even less effective in his second term than he was in his first. The judicial system is also in a weak state.
- The security outlook is highly unsettled, attacks by elements linked to the Taliban remain frequent. In 2011, a series of high-profile assassinations further weakened the government and have raised doubts that the country could manage itself once the coalition troops transferred security over to the Afghan police and military. The government's credibility is further diminished because of the corruption in the ranks, violence against women and prisoners, and the large number of civilian casualties.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 74.00 (150/179)**
- Although Afghan media continued to grow and diversify in 2011, access to media outlets differs radically among ethno-linguistic groups. Those in Afghanistan who speak Dari at home, for example, are more likely to use TV for news every day than are Pashto speakers, who are more likely to listen to radio for news.
- Journalist have continually faced difficulty with government interference, threats, arrests and harassment by politicians and those in power. Kabul displays a relatively higher media freedom and diversity than anywhere else in the country. There are currently dozens of independent and private radio and several private television stations in the country.
- Internet and mobile telephone use has increased rapidly, providing news and information to particularly urban residents. The Taliban has picked up their effort to damage telecommunications and transmission infrastructure to curb this trend.
- In September 2011, an Afghan journalist reporting for the BBC was killed by NATO forces during a fight against insurgents. He was mistaken for a suicide bomber.



PROFILE



Voice of America



### English to Asia

**Language of Broadcast:** English

**Content:** 14 hrs. of original radio programming per week; Internet

**Distribution:** 97 affiliates (57 Radio, 40 TV); radio is streamed on the Internet, downloadable on podcast, and broadcast on SW, MW, and relayed via satellite and affiliates.

**Radio:** Produces regionalized and international news programming targeted to Asia. *Daybreak Asia* (morning) and *Crossroads Asia* (evening) deliver targeted news and information; *International Edition* contains world news. *Reporters' Notebook* provides a platform for discussion of the week's top news by VOA English language correspondents.

**TV:** Production of video content for web delivery.

**New Media:** Produces written, audio and video content for the Asia page of the English website. Provides podcasts of radio programming available through the English web page and iTunes. Includes articles, photos, video, audio, and other multimedia forms such as flash. Platforms include [voanews.com](http://voanews.com), Facebook, Twitter, Tumblr, Storify, mobile and limited SMS. Asia is the source of more than one million foreign visitors to the English website each month, more than any other region.

**Staff:** 96+ | **Budget:** \$14,138,000+

**Established:** 1942 to present



### English to Middle East

**Language of Broadcast:** English

**Content:** 10.5 hrs. of original radio programming per week; 0.5 hrs. of original TV programming per week; Internet

**Distribution:** 20 affiliates (18 Radio, 2 TV) Radio on IBB FMs in Iraq and Kuwait, SW and ArabSat

**Radio:** The English Division recently began regionalizing programming to the Middle East; *Middle East Monitor* (evening) delivers targeted news and information; *International Edition* contains world news. Also, current affairs programming which includes *Press Conference*, *USA* features interviews about critical issues; *Encounter*, panel discussion, and *Issues in the News*, correspondents' discussion.

**TV:** *On the Line* is an interview program dealing with current events.

**Digital distribution:** Includes articles, photos, video, audio, and other multimedia forms such as flash. Platforms include [voanews.com](http://voanews.com), Facebook, Twitter, mobile and limited SMS. The English website has the largest audience of any of VOA's services.

**Staff:** Please see English to Asia

**Budget:** Please see English to Asia

**Established:** 1942 to present



### Learning English

**Language of Broadcast:** English

**Content:**

**Radio:** 10 hours of original programming per week including multiple 10-minute newscasts; feature programming includes health, American life, science/technology and US history; Internet. Audio programs are also posted online with MP3s, podcasts and transcripts for reading and listening comprehension.

**TV:** Five 4-minute modules per week for English learning; subjects include development, education and agriculture.

**New Media:** Includes articles, photos, video, audio, and other multimedia forms. Platforms include websites, Facebook, Twitter, YouTube, a weekly newsletter, and a mobile site. "The Classroom" is an interactive e-learning site that includes live ESL teaching on Facebook, using VOA stories as the basis for teaching language and grammar.

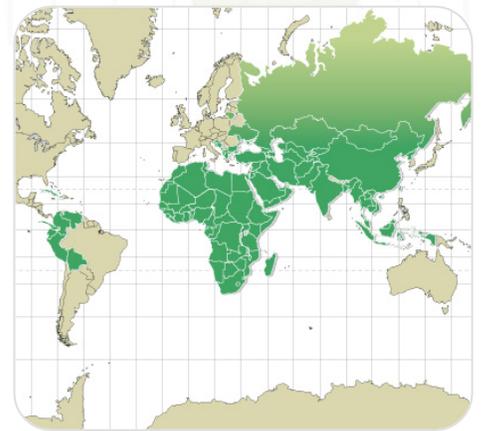
**Partners:** Companies in many countries use Special English materials to produce and sell as their own English-teaching products.

**Distribution:** Radio (27 affiliates; SW and MW); TV (on satellite to affiliates)

**Staff:** Please see English to Asia

**Budget:** Please see English to Asia

**Established:** 1942 to present



## English Current Affairs

**Language of Broadcast:** English

**Content:** 6 hours of original radio programming per week; 0.5 hours of original TV programming per week; Internet

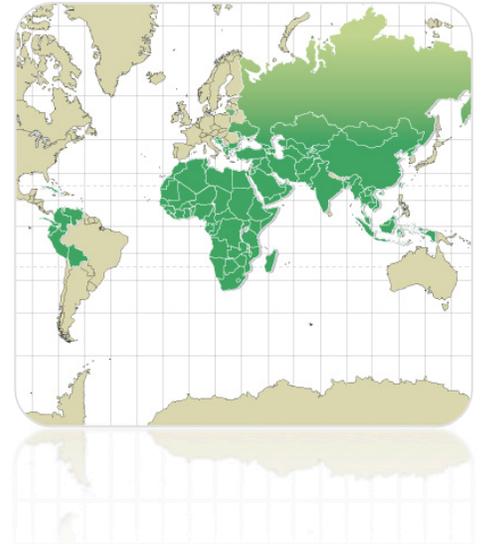
**Distribution:** Affiliates, satellite, and IBB SW

VOA's English Current Affairs Hub delivers news and analysis of critical international issues to worldwide audiences. Current Affairs helps fulfill the VOA Charter in presenting "responsible discussions and opinion" on the policies of the United States. In addition to news-driven discussion of world events, Current Affairs presents programs on American culture, ideas and institutions.

**Radio:** VOA's English Current Affairs Hub broadcasts six 30-minute programs each weekend. In addition to the radio simulcast of the TV program *On the Line*, there is the point-counterpoint debate program *Encounter*, the one-on-one newsmaker interview program *Press Conference, USA* and a round-table round-up and discussion of the week's news featuring noted Washington journalists, *Issues in the News*. *Science World* brings together original VOA reporting on science, technology, health and the environment. Topics in American life and culture are the focus of the radio magazine *American Café*.

**TV:** Current Affairs produces *On the Line*, a weekly 30-minute international affairs panel discussion program providing in-depth analysis and debate.

**New Media:** In addition to broadcasting, English Current Affairs delivers all of its video and audio programming via the Internet. Some radio programming is also produced in video format for webcasting. *Science World* also features a popular blog that engages the audience.



## Audience Size & Weekly Reach

- Most of VOA's Worldwide English programming is consumed in Africa with Nigeria, Ghana, Tanzania, Kenya and Uganda rounding out the top five countries with largest audiences. Outside of Africa, the largest audiences are in Russia (1.2 million), China (1.1 million) and Qatar (0.7 million).

## Web Analytics

**Weekly Visitors** 703,500+

**Weekly Visits** 999,900+

†Worldwide English totals.

Country	Population	Radio Audience Size	Radio Weekly Reach %	TV Audience Size	TV Weekly Reach %	USIB Internet Audience Size	USIB Internet Weekly Reach %
China	1,345,900,000	1,078,434	0.1	na	na	na	na
Ghana*	25,000,000	834,480	5.7	556,320	3.8	43,920	0.3
Indonesia	238,200,000	310,158	0.2	na	na	155,079	0.1
Nigeria*	162,300,000	3,609,240	4.0	1,443,696	1.6	270,693	0.3
Qatar	1,700,000	44,352	6.4	na	na	na	na
Russia	142,800,000	361,845	0.3	na	na	964,920	0.8

- Research consistently demonstrates that many people who say they know English as a second language actually have difficulty understanding normal radio or television broadcasts in the language, and are therefore good targets for VOA's Learning English programs. These programs are especially valuable for the millions of people around the world who want to learn American English. Large potential audiences are most likely found in South and East Asia, as well as parts of Africa.

P R O F I L E



**Language of Broadcast:** English

**Content:** 74.5 hrs. of original radio programming per week; 3.5 hrs. of original TV programming per week; Internet

**Distribution:** 110 affiliates (88 Radio, 22 TV); 6 IBB FM, 5 MW frequencies, and IBB SW

**Radio:** Produces 14 radio shows, for a total of 74.5 hours of original news and information programming each week targeted to Africa, including the new "South Sudan In Focus" funded by a State Department grant. "VOA Express" allows affiliates to take short pieces of radio content from the web, and soon "VOA Direct" will accommodate TV, text and picture content as well. It is also responsible in part for VOA's 24/7 Hourly English Newscast, used throughout the organization on radio and the Internet.

**TV:** Two Africa-targeted shows, totaling 3.5 hours of original programming per week, including *In Focus*, a 30-minute weekday news magazine show, and *Straight Talk Africa*, a weekly call-in program featuring prominent African guests.

**New Media:** Manages the VOAafrica.com webpage on VOAnews.com, dedicated to news, features and information from and about the continent of Africa. It regularly runs special interactive, multi-media coverage of elections, special health reporting and feature series. Launching four show-related Facebook pages, the service regularly posts video clips on YouTube, opens comment sections on stories that generate lively debate and maintains blogs on youth issues, African music, and sports. Web traffic has increased over 100% in the past year.



**Staff:** 14

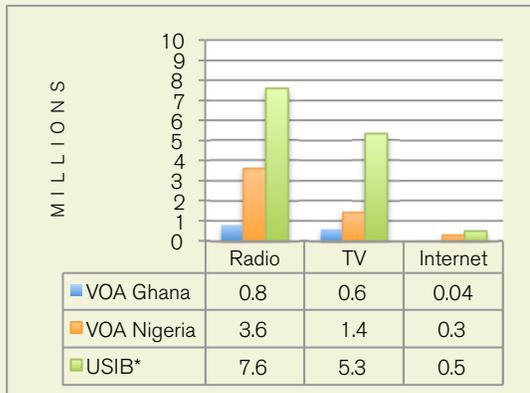
**Budget:** \$2,527,000

**Established:** 1942 to present

English to Africa

P E R F O R M A N C E D A T A (Using Data from Ghana, Oct '10 and Nigeria, Dec '10)

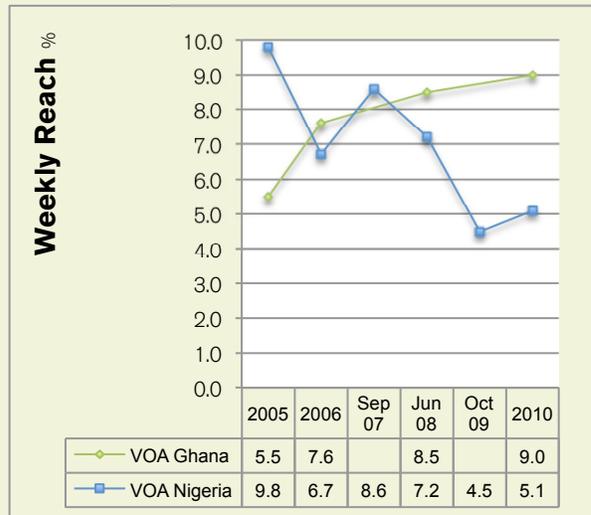
**Audience Size**



**Weekly Reach (%) by Media**

	VOA Ghana	VOA Nigeria
Radio	5.7	4.0
TV	3.8	1.6
Internet	0.3	0.3
Total	9.0	5.1

**Weekly Reach %**



**Awareness (%)**

	VOA Ghana	VOA Nigeria
	27	57

**Credibility**

	VOA Ghana	VOA Nigeria
Percentage of surveyed weekly audience that found broadcasts credible (%)		
Radio	99	92
TV	95	94

**Understanding**

	VOA Ghana Radio**	VOA Nigeria Radio**
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
Current Events	96	83
U.S. Culture	91	75
U.S. Policies	86	68

**Quality**

	VOA
Combined Scores from audience panel	
Radio	3.3
TV	3.3

Data are from an October 2010 survey of adults (15+) in Ghana and a December 2010 survey of adults (15+) in Nigeria..

\*USIB audience estimate is based on data from Burundi, Ethiopia, Ghana, Guinea, Kenya, Niger, Nigeria, Rwanda, Somalia (Mogadishu only), Tanzania, Uganda and Zambia, Zimbabwe.

\*\*In Ghana, understanding ratings for VOA English to Africa TV are: 89% for Current Events; 85% for U.S. Culture; and 79% for U.S. Policies. In Nigeria, understanding ratings for VOA English to Africa TV are: 94% for Current Events; 86% for U.S. Culture; and 89% for U.S. Policies.

# English to Africa Broadcasting

## A U D I E N C E C O M P O S I T I O N

Total Population of Ghana 25 million and Nigeria 162.3 million

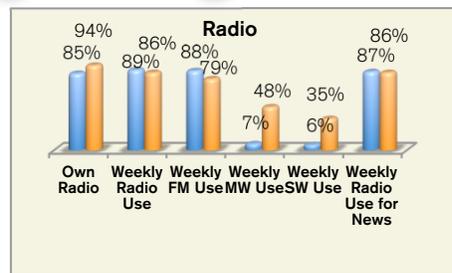
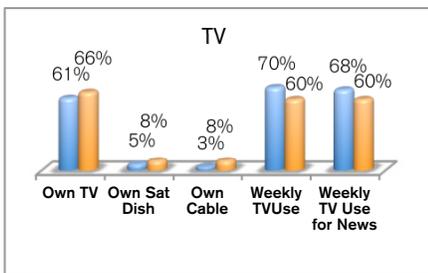
	VOA Ghana Sample	VOA Ghana Wkly. Aud.	VOA Nigeria Sample	VOA Nigeria Wkly. Aud.
<b>Sex</b>	%	%	%	%
<b>Male</b>	48	56	49	69
<b>Female</b>	52	44	51	31
<b>Age</b>				
<b>15-24</b>	32	30	28	34
<b>25-34</b>	28	27	28	34
<b>35-44</b>	16	14	18	18
<b>45-54</b>	11	16	14	9
<b>55-64</b>	7	8	9	3
<b>65+</b>	6	6	2	2

	VOA Ghana Sample	VOA Ghana Wkly. Aud.	VOA Nigeria Sample	VOA Nigeria Wkly. Aud.
<b>Education</b>	%	%	%	%
<b>No Formal</b>	14	4	41	13
<b>Primary</b>	20	16	21	13
<b>Sec/Voc.</b>	60	62	31	44
<b>Coll./Univ.</b>	6	17	8	27
<b>Ethnicity/Nationality</b>				
<b>Twí</b>	40	34	na	na
<b>Ewe</b>	14	18	na	na
<b>Hausa</b>	2	4	42	41
<b>Yoruba</b>	na	na	21	9
<b>Other</b>	44	44	37	50

	VOA Ghana Sample	VOA Ghana Wkly. Aud.	VOA Nigeria Sample	VOA Nigeria Wkly. Aud.
<b>Residence</b>	%	%	%	%
<b>Urban</b>	44	62	41	57
<b>Semi-urban</b>	na	na	10	12
<b>Rural</b>	56	38	49	31
<b>Language Spoken At Home</b>				
<b>Twí</b>	44	38	na	na
<b>Ewe</b>	12	14	na	na
<b>Hausa</b>	2	4	49	49
<b>Yoruba</b>	na	na	20	9
<b>English</b>	2	4	6	10
<b>Other</b>	40	40	25	32

## M E D I A U S E \*\*\*

■ Ghana ■ Nigeria

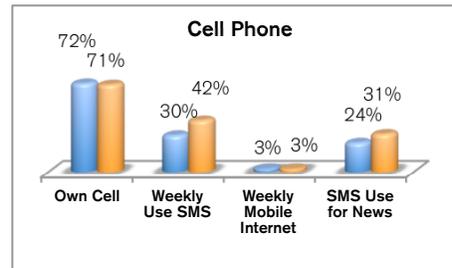
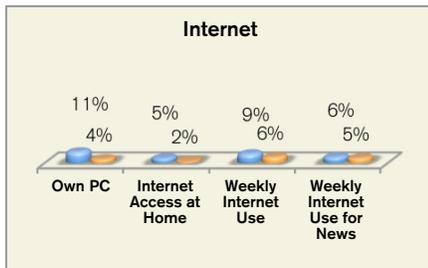


### Ghana Top Ten Sources of News

1. Ghana TV
2. TV3
3. Peace FM 104.3
4. Metro TV
5. Radio Savannah
6. Adom FM 106.3
7. TV Africa
8. Fox FM 97.9
9. Viasat 1
10. Daily Graphic

### Nigeria Top Ten Sources of News

1. NTA
2. BBC
3. VOA
4. DW Radio
5. FM Kano
6. Rima FM
7. Radio Jigawa
8. AIT Lagos
9. Freedom FM
10. Osun Radio



### Web Analytics

**Weekly Visitors** 703,500+

**Weekly Visits** 999,990+

†Worldwide English totals.

## C O N T E X T \*\*\*



### Political Situation

- **Freedom House Political Freedom Index (2011): Ghana—FREE**
- **Economist Intelligence Unit Instability (2010): Ghana—HIGH RISK**
- Despite tensions between the ruling and opposition parties over corruption investigations, Ghana enjoyed relative political stability in 2011. The country's track record on human rights and good governance are held up as a model amidst its less stable West African neighbors. Political tensions may intensify as the December 2012 elections approach.

### Media Environment

- **Freedom House Press Freedom Index (2011): Ghana—FREE; Nigeria—PARTLY FREE**
- **Reporters Without Borders Index (2011): Ghana—11.00 (41/179)**
- Ghana's media environment is considered one of the freest in Africa, with private newspapers, radio and TV stations competing freely with the state-sponsored Ghana Broadcasting Corporation.
- Radio remains the most accessible and widely used media platform, though a majority of Ghanaians also watch TV at least weekly for news and information.

\*\*\*Refer to the Hausa page for media use and context information for Nigeria.

P R O F I L E



**Language of Broadcast:** French to Africa

**Content:** 23 hrs. of original radio programming per week; 1 hr. of original TV programming per week; Internet

**Distribution:** 59 affiliates (FM and MW); 3-5 IBB SW frequencies; 3 IBB FMs, 1 in Ouagadougou and 1 in Abidjan; two shared IBB FM, 1 in Djibouti and 1 in Kigali; and 12 TV affiliates.

**Radio:** The bulk of the French to Africa audience is in DR Congo, where VOA's partner, RAGA-FM, is heard in almost all the major cities of the country. In addition, VOA has affiliates in Dakar and Kaolack, Senegal; Yaounde and Douala, Cameroon; Bamako, Mali; Libreville, Gabon; Lome and Sokode, Togo; and Conakry, Guinea.

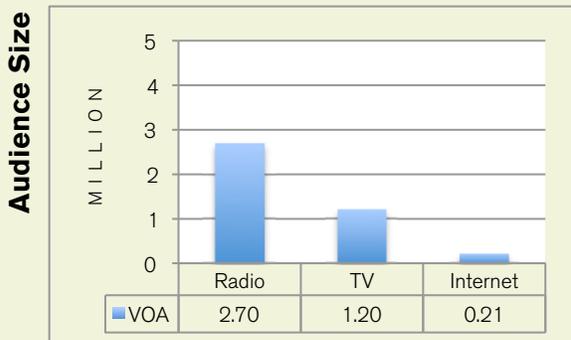
**TV:** French to Africa has a co-production arrangement with Raga-TV in DR Congo, sending packages to affiliates in Gabon, Benin, Guinea, Niger, Cameroon/Douala, and the DRC. Similar arrangements are being made with affiliates in Burkina Faso, Cameroon and Togo. These affiliates can also download French to Africa's own packages, besides the service's weekly TV show *Washington Forum*.

**New Media:** The Service has a website as well as active Facebook and Twitter accounts.

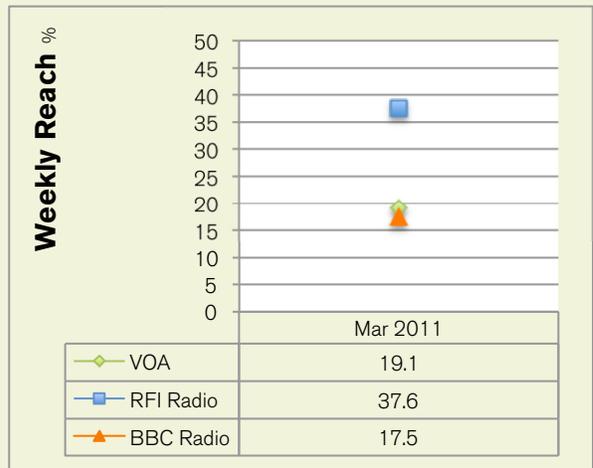
**Staff:** 18  
**Budget:** \$2,190,000  
**Established:** 1960 to present

French to Africa

P E R F O R M A N C E D A T A (Using Data from DRC, March 2011)



Weekly Reach (%) by Media	
VOA in DRC	
Radio	15.5
TV	6.8
Internet	1.1
<b>Total</b>	<b>19.1</b>



Awareness (%)	
VOA in DRC	
<b>Total</b>	<b>64</b>

Credibility	
Percentage of surveyed weekly audience that finds broadcasts credible (%)	
VOA in DRC	
Radio	97
TV	100

Understanding	Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
	Radio	TV
Current Events	95	na
U.S. Culture	60	na
U.S. Policies	67	na

Quality	
Combined Scores from audience panel	
VOA	
Radio	3.4
TV	3.4

Data are from a March 2011 survey of adults (15+) in urban areas of the Democratic Republic of Congo.

# French to Africa Broadcasting

## A U D I E N C E C O M P O S I T I O N \*

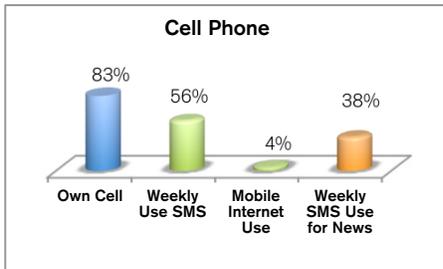
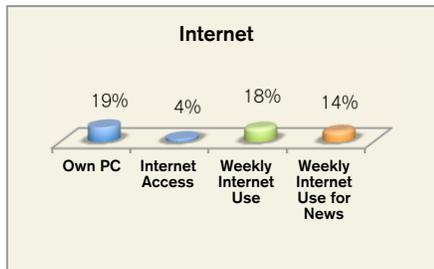
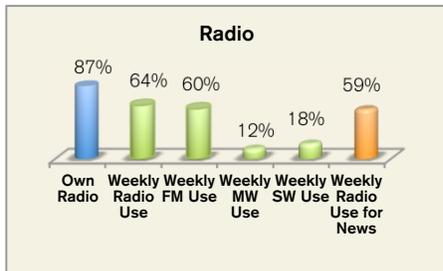
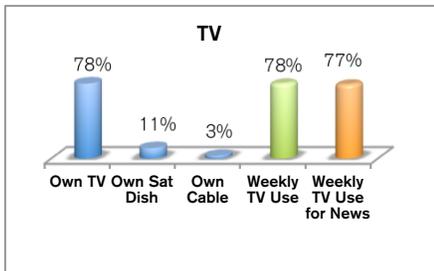
Total Pop. of Democratic Republic of Congo (DRC): 67.8 M

	Sample	VOA Weekly Audience
	100%	4.5%
<b>Sex</b>	%	%
Male	49	66
Female	51	34
<b>Age</b>		
15-24	34	27
25-34	34	34
35-44	18	25
45-54	8	9
55-64	3	4
65+	2	1

	Sample	VOA Weekly Audience
<b>Education</b>	%	%
None/Primary	7	<1
Secondary/Vocational	17	11
High School	29	22
Inc Higher	21	24
Higher	24	41
<b>Ethnicity/Nationality</b>		
Baluba	23	23
Bakingo	19	21
Other	58	56

	Sample	VOA Weekly Audience
<b>Residence</b>	%	%
Urban	100	100
Rural	na	na
<b>Language</b>		
French	20	26
Swahili	33	28
Lingala	33	33
Other	14	13

## M E D I A U S E (Using Data from DRC March 2011)



### Top Ten Media Outlets

1. Digital Congo
2. TV RTNC1
3. TV5
4. RFI
5. Radio Okapi
6. BBC
7. Mirador TV
8. Antenne A
9. Radio RTNC
10. CCTV

### Top Ten Sources of News

1. TV RTNC1
2. Radio Okapi
3. TV 5
4. France 24
5. Digital Congo
6. RFI
7. Radio RTNC
8. Mirador TV
9. Antenne A
10. Canal France international

### Google Analytics

<b>Weekly Visitors</b>	3,200
<b>Weekly Visits</b>	5,300

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): VERY HIGH RISK**
- Presidential and legislative elections in the Democratic Republic of Congo (DRC) are scheduled for November 28th. In late June the president, Joseph Kabila, signed into law a bill that limits the presidential election to one round—the 2005 constitution required two rounds if no candidate secured more than 50% in the first round. This will greatly increase Mr. Kabila's chances of re-election as he no longer needs over 50% of the vote to be returned to office. The new law also limits future presidents to one term of office only. The National Assembly passed the bill in mid-June, although opposition parties boycotted the vote in protest. In January a joint sitting of the National Assembly and Senate had approved constitutional amendments that made the new law possible.
- The North and South Kivu provinces are distinct from the rest of DRC. These are areas where fighting between different military groups remains high, there is a higher concentration of refugees from neighboring countries and infrastructure is generally less developed than in the rest of the country.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 67.67 (145/179)**
- The media market in Kinshasa is more competitive than in other parts of DRC. In Kinshasa's radio market, for example, there are 10 domestic radio stations with more than 10 percent reach, compared to only four domestic stations outside of Kinshasa. In addition, there are 15 domestic and international TV broadcasters with more than 10 percent reach in Kinshasa compared to four in other urban areas of the country. Weekly use of TV—including international TV—as well as weekly use of SMS, internet and newspapers for news in Kinshasa is higher than elsewhere, creating even more competition for international broadcasters.
- The Kivu region's media market is different from that of DRC in general. Although levels of radio ownership in Kivu (90 percent) are similar to those in the country as a whole (87 percent), the use of radio for news and information is considerably higher in Kivu (79 percent) compared to the country in general (59 percent). However, the use of international radio in Kivu is similar to its use across DRC, probably because of language barriers—international broadcasters predominantly broadcast in French. Ownership of television is significantly lower, as is the use of TV—including international TV—for news and information.

P R O F I L E



**Language of Broadcast:** Georgian

**Content:** 7 hrs. of orig. and 7 hrs. of repeat radio prog. per week; 15 min. television per week; Internet

**Distribution:** 2 affiliates (1 FM, 1 TV), 3 IBB SW frequencies and satellite.

**Radio:** VOA's Georgian Service is heard on one affiliate, the Georgia Public Broadcasting, the country's third most powerful FM distribution facility.

**TV:** The Service produces a 15-minute weekly television show titled *Washington Today*. It is aired in Georgia on Network 1 of Georgia Public Broadcaster.

**Web:** The Service has a multimedia website, a mobile site, a Facebook fan page, Twitter and YouTube accounts, and sends an email newsletter.

**Staff:** 6

**Budget:** \$764,000

**Established:** 1951 to present



**Language of Broadcast:** Georgian and Russian to Georgia

**Content:** 27 hrs. of original and 2 hrs. of repeat radio programming per week; 1.5 hours of original TV programming per week; Internet

**Distribution:**

**Radio:** RFE/RL delivery for Georgian includes 2 national FM networks & 6 regional FM affiliates, HotBird and AsiaSat. Alt. delivery includes fortnightly publication and distribution of newspapers.

**New Media:** The Service has a website, mobile site, Facebook & YouTube page and very active blog.

**TV:** RFE/RL has 1 national TV affiliate carrying a weekly 60-minute program and 1 satellite channel broadcasting a weekly half-hour Russian-language program focused on the Caucasus.

**Delivery for Ekho Kavkaza in Russian** includes 2 national network & 2 regional FM affiliates, IBB



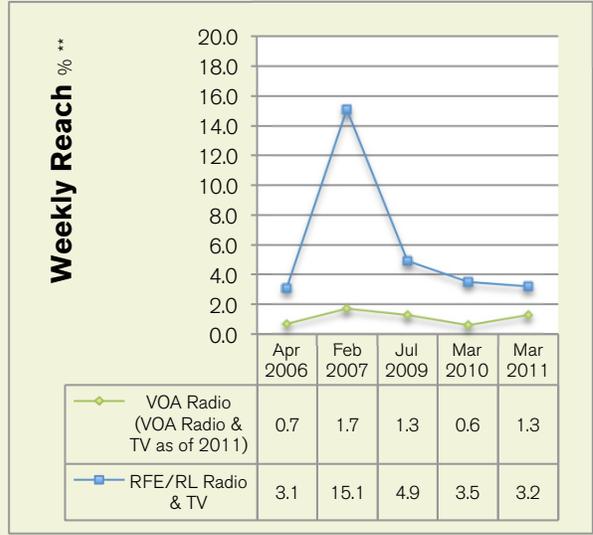
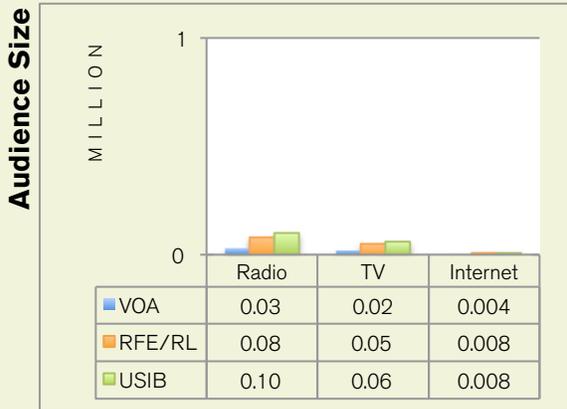
provided SW, Internet with live audio streaming, mobile site and fortnightly publication and distribution of newspapers in refugee enclaves.

**Staff:** 10

**Budget:** \$2,042,000

**Established:** 1953 to present

P E R F O R M A N C E D A T A (Using Data from Georgia, March 2011)



Weekly Reach (%)			
	VOA	RFE/RL	USIB
Radio	.9	2.1	2.5
TV	0.5	1.4	1.8
Internet	0.1	0.2	0.2
<b>Total</b>	<b>1.3</b>	<b>3.2</b>	<b>4.7</b>

Awareness (%)	
VOA	RFE/RL
35	56

Georgian

Credibility	Percentage of surveyed weekly audience that finds broadcasts credible (%)*	
	VOA	RFE/RL Radio
Radio	95	97
TV	na	na

Understanding	Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
	VOA Radio	RFE/RL Radio
Current Events	75	68
U.S. Society (VOA) or Current Events In Georgia (RFE/RL)	79	68
U.S. Policies	64	na

Quality	Combined Scores from audience panel	
	VOA	RFE/RL
Radio	3.4	3.6
TV	na	na

\*Samples of VOA and RFE/RL weekly radio and TV audiences in the survey are too small for meaningful analysis.

Data are from a March 2011 nationwide survey of adults (15+) in Georgia.

# Georgian Broadcasting

Total Population of Georgia: 4.3 million

## A U D I E N C E C O M P O S I T I O N

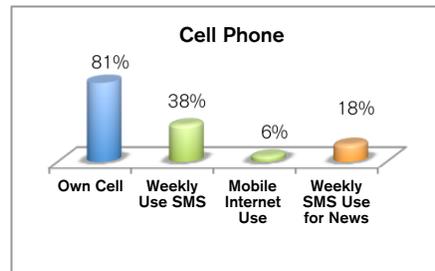
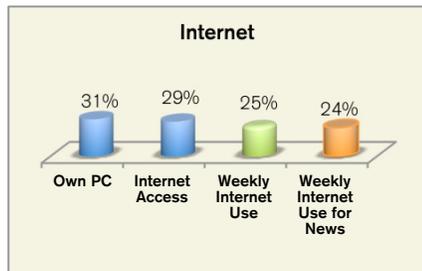
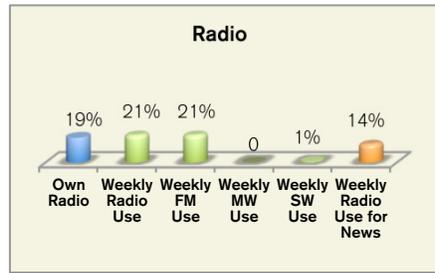
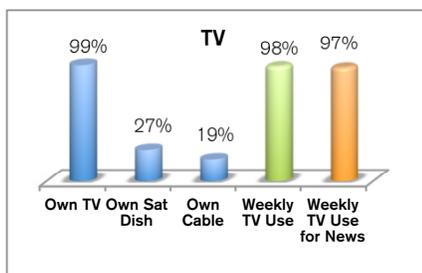
	Sample	VOA Annual Aud.*	RFE/RL Weekly Aud.
<b>Sex</b>	%	%	%
<b>Male</b>	46	55	53
<b>Female</b>	54	45	47
<b>Age</b>			
<b>15-24</b>	20	12	8
<b>25-34</b>	18	23	17
<b>35-44</b>	19	20	21
<b>45-54</b>	14	16	14
<b>55-64</b>	13	17	25
<b>65+</b>	17	12	15

	Sample	VOA Annual Aud.*	RFE/RL Weekly Aud.
<b>Education</b>	%	%	%
<b>Inc. Sec.</b>	23	3	4
<b>Secondary</b>	29	16	21
<b>Technical</b>	22	16	12
<b>Higher</b>	26	64	64
<b>Ethnicity/Nationality</b>			
<b>Georgian</b>	86	99	97
<b>Azerbaijani</b>	7	0	2
<b>Armenian</b>	4	0	0
<b>Russian</b>	1	1	0

	Sample	VOA Annual Aud.*	RFE/RL Weekly Aud.
<b>Residence</b>	%	%	%
<b>Urban</b>	53	66	59
<b>Rural</b>	47	31	41
<b>Language</b>			
<b>Georgian</b>	88	98	95
<b>Russian</b>	2	2	4
<b>Other</b>	10	0	1

\*Samples of VOA weekly audiences in the survey are too small for meaningful analysis, hence use of annual audience above.

## M E D I A U S E



### Top Ten Media Outlets

1. Imedi TV
2. Rustavi 2 TV
3. Georgian Public TV 1
4. Ajara State TV
5. Sakartvelo
6. Mze
7. NTV
8. Georgian Public TV 2
9. Radio Ar daidardo
10. Radio Imedi

### Top Ten Sources of News

1. Rustavi TV 2
2. Imedi TV
3. Georgian Public TV 1
4. Dilis gazeti
5. Adjara State TV
6. Tavisupleva.org
7. DW
8. Google
9. ORT-1
10. Radio Ar daidardo

### Web Analytics

<b>VOA</b>	
<b>Weekly Visitors</b>	2,600
<b>Weekly Visits</b>	4,300
<b>RFE/RL</b>	
<b>Weekly Visitors</b>	7,200
<b>Weekly Visits</b>	25,200

## C O N T E X T



### Political Environment

- **Freedom House Political Freedom Index: PARTLY FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (6.3) in 2010**
- Georgia remains a very politicized society. There are hundreds of different registered and unregistered political parties. The political system, however does not represent society well. In a recent poll, over 30 percent of the population supports the incumbent president, Mikhail Saakashvili, with 50 percent of the population undecided.
- The parliament of Georgia is considering a new draft of the Constitution that would turn Georgia from presidential republic to a parliamentary one. Some see it an attempt by Saakashvili to safeguard a position of prime minister after his second presidential terms expires in 2013.
- Georgian relations with Russia remain tense. Taken together, these factors indicate that the Georgian political situation remains less than stable.

### Media Environment

- **Freedom House Press Freedom Index (2011): PARTLY FREE**
- **Reporters Without Borders Index (2011): 38.00 (104/179)**
- Although enjoying relative freedom compared to other countries in the FSU region, Georgian media outlets continue to be polarized and fragmented between opposition and the government, the quality of journalism in the country is low and media ownership rules are non-transparent.
- In Abkhazia and South Ossetia RFE/RL's Ekho Kavkaza's programming in Russian show an increase in listenership. In Abkhazia, weekly use of Ekho Kavkaza was 7.7 percent with 6.8 percent of adults listening to the radio programming each week and 1.4% visiting the website. In South Ossetia the website and radio program are both popular with 1.1 percent of adults visiting the website and .5 percent listening to the radio programming. Overall use in South Ossetia is 1.5 percent weekly.
- The use of Internet for news has overtaken use of conventional radio. Internet is now the third-most important weekly source of news and information for Georgian adults, following TV and friends and family; radio use has declined to sixth position.

P R O F I L E



**Language of Broadcast:** Greek

**Content:** 2.6 hrs. of original and 0.5 hrs. of repeat radio programming per week; 5 min. of original and 5 min. of repeat TV programming per week; Internet

**Distribution:** 3 affiliates (2 FM, 1TV)

**Radio:** VOA Greek produces seven daily five-minute live news satellite programs (M-F) that are simulcast by Greece's top-rated news and information station, affiliate Radio SKAI (Sky) of Athens, and by Radio City International in Thessaloniki, Greece's second largest city. VOA news feeds are also carried by several of Radio SKAI's own affiliates as well as by a network of informal program partners from Canada to Australia through the Internet.

**TV:** The VOA Greek Service's news program, *Reportaz Apo Washington (Washington Report)*, is broadcast five to ten minutes a week on one affiliate in Greece, TV Halkidiki. Occasionally, the program also airs on informal affiliates SKAI (Sky) TV of Athens and CYBC-1 TV of Nicosia.

**Web:** The service has a website, a Facebook page, Twitter and YouTube accounts, and sends out an email newsletter.

**Staff:** 4

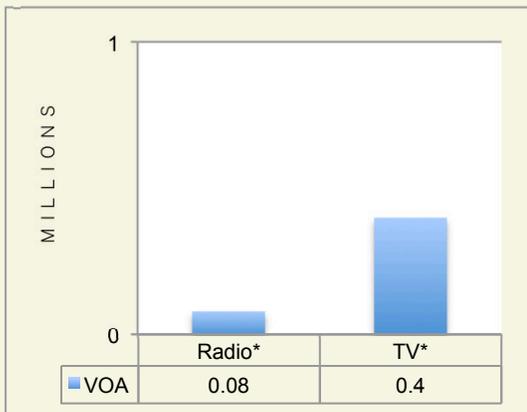
**Budget:** \$525,000

**Established:** 1942 to present; TV service established in 2006



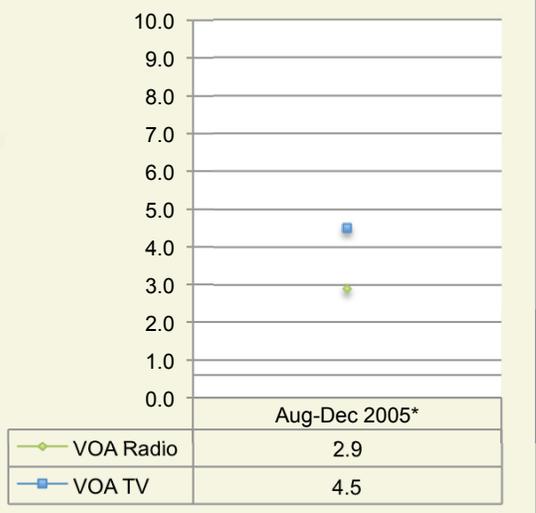
P E R F O R M A N C E D A T A (Using Data from Aug.-Dec., 2005 [radio] & Oct.-Dec. 2005 [TV])

**Audience Size**



Weekly Reach (%) by Media	
VOA	
Radio	2.9*
TV	4.5*
Internet	na
Total	na*

**Weekly Reach**



Awareness (%)	
VOA	
	na

Greek

**Credibility**

Percentage of surveyed weekly audience that finds broadcasts credible (%)	
VOA	
Radio	na
TV	na

**Understanding**

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
VOA Radio	
Current Events	na
U.S. Culture	na
U.S. Policies	na

**Quality**

Combined Scores from audience panel	
VOA	
Radio	3.7
TV	na

\*Radio listenership was recorded using 24-hour "day after" recall and a seven-day diary and reflects audiences in Greater Athens only. TV audience figure is based only on ALPHA TV viewership and does not include estimates for TV Halkidiki in northern Greece or VOA's partner CYBC in Cyprus. Total unduplicated reach figure cannot be derived due to lack of single source data.

Radio reach figures are from a Focus BARI Media Radio Survey in Athens only, August-December 2005. Television figures are from an AGB Nielsen Peoplemeter panel, October-December 2005.

# Greek Broadcasting

Total Population of Greece: 11.3 million

## A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Audience
<b>Sex</b>	%	%
<b>Male</b>	na	na
<b>Female</b>	na	na
<b>Age</b>		
<b>15-24</b>	na	na
<b>25-34</b>	na	na
<b>35-44</b>	na	na
<b>45-54</b>	na	na
<b>55-64</b>	na	na
<b>65+</b>	na	na

	Sample	VOA Weekly Audience
<b>Education</b>	%	%
<b>None</b>	na	na
<b>Primary</b>	na	na
<b>Secondary</b>	na	na
<b>Coll./Univ.</b>	na	na
<b>Ethnicity/Nationality</b>		
<b>Albanian</b>	na	na
<b>Serbian</b>	na	na
<b>Other</b>	na	na

	Sample	VOA Weekly Audience
<b>Residence</b>	%	%
<b>Urban</b>	na	na
<b>Rural</b>	na	na
<b>Language</b>		
<b>Albanian</b>	na	na
<b>Serbian</b>	na	na
<b>Other</b>	na	na

## M E D I A U S E

**TV**

Media Use Data Unavailable

**Radio**

Media Use Data Unavailable

**Google Analytics**  
**Weekly Visitors** 1,600  
**Weekly Visits** 2,000

**Internet**

Media Use Data Unavailable

**Cell Phone**

Media Use Data Unavailable

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- In March 2012, Greece agreed to work with European officials in restructuring the country's debt to avoid default. The global financial crisis, coupled with excessive public spending, wide-spread corruption and the lack of accountability left Greece in a near Great-Depression like recession.
- The early parliamentary elections were held in May 2012 to elect all 300 members of the governing body. The election results showed the crushing defeat of the dominant political party which was blamed for the country's economic collapse and subsequent austerity measures.
- The country's unemployment rate in May 2012 was said to be around 22 percent with the standard of living down 20 percent since 2009. The Greek public has responded to aid packages that demanded austerity measures, which many perceive would further reduce the standard of living with rallies and strikes, some of which turned violent.

### Media Environment

- **Freedom House Press Freedom Index (2011): FREE**
- **Reporters Without Borders Index (2011): 24.00 (70/179)**
- Television is Greece's dominant medium. Since the late 80s, the market has been expanding quickly, with hundreds of new commercial TV services engaging in fierce competition. Digital TV services are commercially available via IPTV and satellite; broadband penetration is growing. On the other hand, there is a lack of existing cable TV services and satellite TV penetration is low.
- Overall, the number of radio and TV outlets is estimated at close to 1,800. EU standards are not consistently applied and many of these broadcasters are unlicensed. There is also a vibrant press, with a variety of newspapers in print.
- Violence against the media is not unheard of and is rather shocking by European standards. According to Reporters Without Borders, journalists are often physically assaulted by various extreme groups when covering social unrest. In addition, they are often targeted for their investigative reporting on sensitive political issues.

P R O F I L E



**Language of Broadcast:** Hausa

**Content:** 13 hrs. of original radio programming per week; Internet

**Distribution:** 32 affiliates (32 FM), 1 IBB MW and 3 - 5 SW frequencies

**Radio:** The Hausa Service has four 30-minute air-shows Monday thru Friday and 2 on Saturday and Sunday. The Service also produces a weekly health program. These are broadcast through SW, MW and FM frequencies. The Service has 32 active FM affiliates in Nigeria, Ghana, Niger, Mali, Burkina Faso and Senegal. Several local radio stations in Nigeria also carry packaged VOA Hausa programming.

**New Media:** The Service offers live and recorded broadcasts as well as written content on its website, and at [hausavoa.mobi](http://hausavoa.mobi) provides the latest news to mobile phone users. The service is on both Facebook and Twitter.

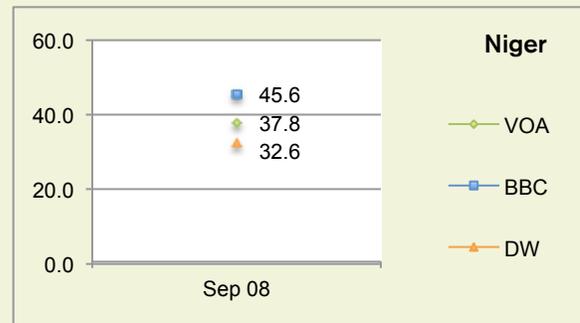
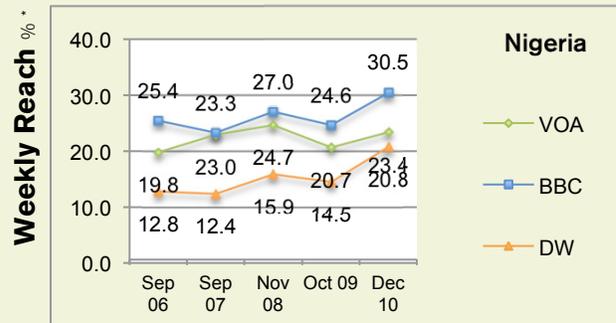
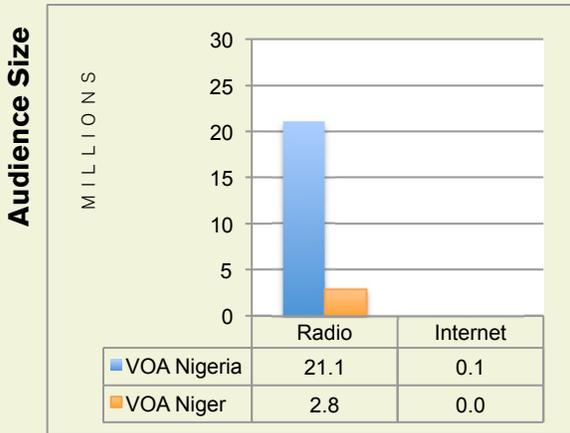
**Staff:** 10

**Budget:** \$1,338,000

**Established:** 1979 to present



P E R F O R M A N C E D A T A (Using Data from Nigeria, Dec. 2010 & Niger, Sept, 2008)



Weekly Reach by Media (%)		Awareness (%)	
	Nigeria	Niger	
Radio	23.4	37.8	57
TV	na	na	64
Internet	0.1	<.1	
<b>Total</b>	<b>23.4</b>	<b>37.8</b>	

**Credibility**

Percentage of surveyed weekly audience that found broadcasts credible (%)	
	Nigeria
Radio	95
TV	na

**Understanding**

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
	Nigeria
Current Events in Country	91
U.S. Culture	81
U.S. Policies	75

**Quality**

Combined Scores from audience panel	
	VOA
Radio	3.6
TV	na

Hausa

\*Data in relation to national populations, not just Hausa speakers. Reach among Hausa speakers only is significantly higher.

Data are from a December 2010 survey of adults (18+) in Nigeria and a September, 2008 survey of adults (15+) in Niger.

## A U D I E N C E C O M P O S I T I O N

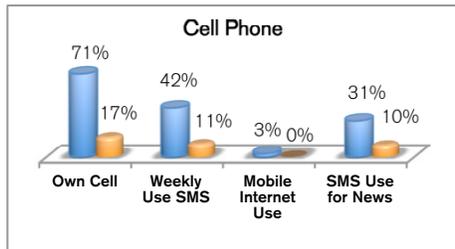
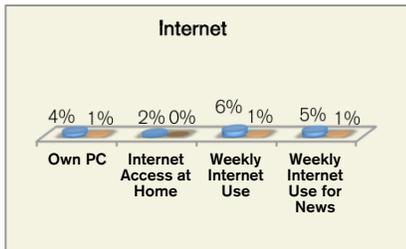
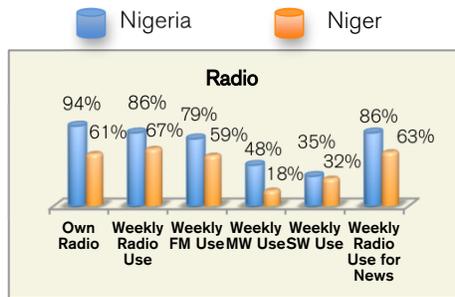
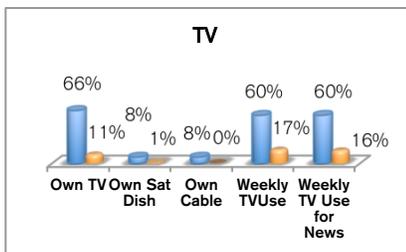
Total Population of Nigeria 162.3 million and Niger 16.1 million

	Nigeria Sam.	Nigeria Weekly Aud.	Niger Sam.	Niger Weekly Aud.
<b>Sex</b>	%	%	%	%
<b>Male</b>	49	61	45	66
<b>Fem.</b>	51	39	55	34
<b>Age</b>				
<b>15-24</b>	28	27	28	28
<b>25-34</b>	28	28	24	23
<b>35-44</b>	18	18	16	18
<b>45-54</b>	14	15	15	16
<b>55-64</b>	9	8	10	8
<b>65+</b>	2	4	7	6

	Nigeria Sam.	Nigeria Weekly Aud.	Niger Sam.	Niger Weekly Aud.
<b>Educ.</b>	%	%	%	%
<b>None</b>	41	62	82	78
<b>Primary</b>	21	17	10	11
<b>Second.</b>	31	16	5	7
<b>Higher</b>	8	5	3	5
<b>Ethnicity/Nationality</b>				
<b>Hausa</b>	42	74	62	79
<b>Yoruba</b>	21	1	na	na
<b>Igbo</b>	14	2	na	na
<b>Djerma</b>	0	23	20	5
<b>Other</b>	23	74	18	16

	Nigeria Sam.	Nigeria Weekly Aud.	Niger Sam.	Niger Weekly Aud.
<b>Residence</b>	%	%	%	%
<b>Urban</b>	41	44	19	21
<b>Semi-urb.</b>	10	5	na	na
<b>Rural</b>	49	50	81	79
<b>Language Spoken at Home</b>				
<b>Hausa</b>	49	90	66	83
<b>Yoruba</b>	20	1	na	na
<b>Igbo</b>	12	1	na	na
<b>Other</b>	19	8	34	17

## M E D I A U S E



### Top Ten Sources of News (Nigeria)

1. NTA
2. BBC
3. VOA
4. DW Radio
5. FM Kano
6. Rima FM Radio Sokoto
7. Radio Jigawa
8. AIT Lagos
9. Freedom FM
10. Osun Radio

### Top Ten Sources of News (Niger)

1. Tambara FM
2. Radio Fara'a
3. Alternative FM
4. Tele Sahel
5. Africa N.o.1
6. La Voix du Sahel
7. Dalol FM
8. L'Evennement
9. Radio Anfani FM
10. Douinia TV

### Web Analytics

<b>Weekly Visitors</b>	17,900
<b>Weekly Visits</b>	33,900

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011):** Nigeria—PARTLY FREE; Niger—PARTLY FREE
- **Economist Intelligence Unit Instability (2010):** Nigeria—HIGH RISK; Niger—VERY HIGH RISK
- Cameroon and Ghana have small populations of Hausa speakers, but it is oil-rich Nigeria—Africa's most populous and economically significant country—where the impact of Hausa broadcasting is greatest. More than half of the country's adult population comprises largely Hausa-speaking Muslims. Around half the population of neighboring Niger speaks or understands Hausa.
- Censorship remains a serious issue for private broadcasters in Nigeria. VOA's affiliates have been no exception (Freedom FM's executive vice-chairman Alhaji Ado Mohamed was arrested in June 2009). The problem is acute in the north as regional and local authorities lash out against content perceived as anti-Islamic.
- Nigeria has had an elected government since 1999, and the government is now challenged with keeping the country from fracturing along ethnic and religious lines. Umaru Yar'Adua of the ruling People's Democratic Party (PDP) won the presidency following the April 2007 elections, but died of illness in May 2010. Vice President Goodluck Ebele Jonathan, also of the PDP, was sworn in as Nigerian president one day after Yar'Adua's death and reelected in April 2011.

### Media Environment

- **Freedom House Press Freedom Index (2011):** Nigeria—PARTLY FREE; Niger—NOT FREE
- **Reporters Without Borders Index (2011):** Nigeria—56.40 (126/179); Niger—2.50 (29/179)
- The media landscapes in the north and south of Nigeria differ dramatically. Media in the north continues to revolve around radio; access to and use of shortwave radio has not changed significantly for several years. Even among elites in capital cities in the north, television and Internet use are not prevalent. In the south, on the other hand, evening TV audiences have surpassed evening radio listening.
- Reception issues are a continuing concern as the ban on rebroadcasts of foreign radio programs continues and most listening to VOA takes place on shortwave. Nigeria continues to be a strong shortwave market, though this is almost entirely due to the habits of the Hausa population, as their daily use of shortwave radio is six times higher than that of other Nigerians.
- Hausa audiences are far less likely to watch television or use the Internet than are other Nigerians. While the most common way of going online is at Internet cafes, mobile phones represent the most prevalent means of personal access. Social networking sites such as Facebook are increasingly popular as a source of news and information.

P R O F I L E



**Language of Broadcast:** Afan Oromo, Amharic, Tigrigna  
**Content:** 14.5 hrs. of original radio programming per week; Internet  
**Distribution:** Afan Oromo: 5 SW; Amharic: 1 Djibouti MW & 5 IBB SW; Tigrigna: 5 IBB SW frequencies

**Radio:** The Horn of Africa Service broadcasts in Afan Oromo, Amharic and Tigrigna; each language has 5 IBB shortwave frequencies. The service also offers live and repeat audio in each of the 3 languages on Arabasat's BADR-4 satellite. In 2011, the service began broadcasting special 30 minute "Lifeline" drought and development programs on Djibouti AM 1431.

**New Media:** Each language has its own website and Facebook page. VOA also offers a Web-based newsletter to Ethiopian listeners through a proxy server.

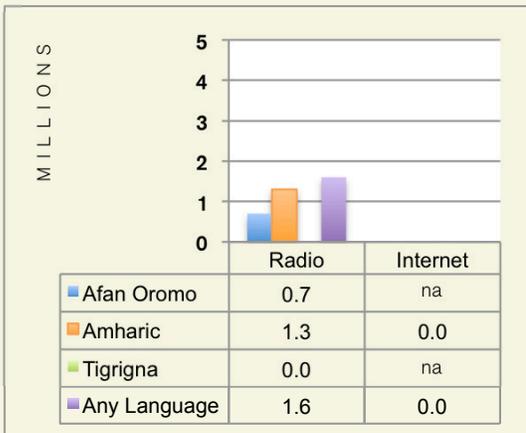
**Staff:** 16 | **Budget:** \$2,000,000

**Established:** Afan Oromo: 1996 to present; Amharic: 1982 to present; Tigrigna: 1996 to present



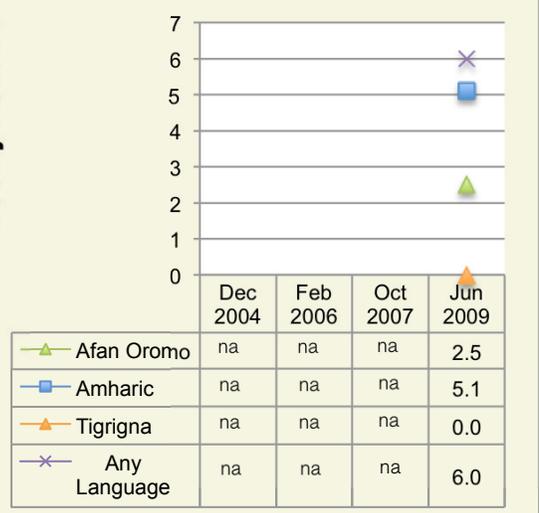
P E R F O R M A N C E D A T A (Using Data from Ethiopia, June 2009)

**Audience Size**



Weekly Reach by Media (%)				
	Afan Oromo	Amharic	Tigrigna	Any Language
Radio	2.5	5.1	<.1	6.0
TV	na	na	na	na
Internet	na	<.1	na	<.1
<b>Total</b>	<b>2.5</b>	<b>5.1</b>	<b>&lt;.1</b>	<b>6.0</b>

**Weekly Reach %**



Awareness (%)	
	VOA
	52

**Credibility**

Percentage of surveyed weekly audience that found broadcasts credible (%)	
	VOA
Radio	96
TV	na

**Understanding**

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
	VOA
Current Events	88
U.S. Culture	48
U.S. Policies	57

**Quality**

Combined Scores from audience panel	
	VOA
Radio	3.5
TV	na

Data are from a June 2009 survey of adults (18+) in Ethiopia. The regions included in the final sample (Oromiya, Addis Ababa, Dire Dawa and S.N.N.P.) account for 59% of adult population in Ethiopia. Research is not possible in Eritrea, where Tigrigna is the primary language.

\*Due to differences in sample coverage between the 2009 survey and previous surveys of Ethiopia, it is not possible to display trend data.

# Horn of Africa Broadcasting

## A U D I E N C E C O M P O S I T I O N

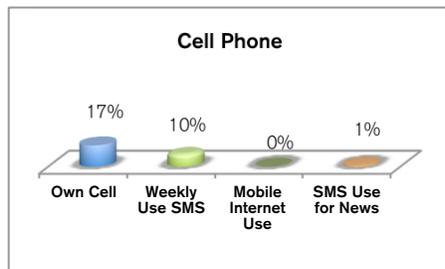
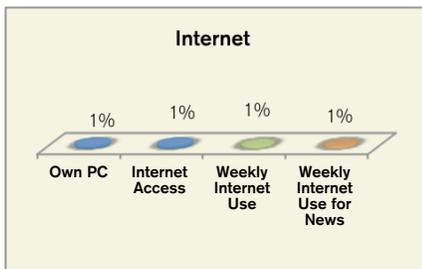
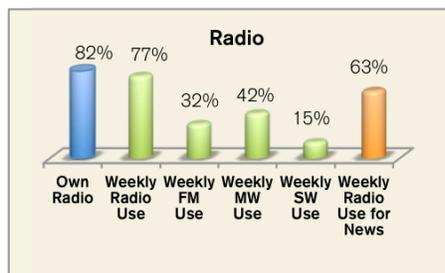
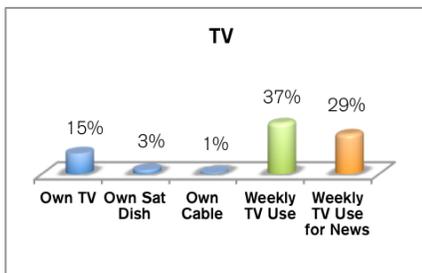
Total Population of Ethiopia: 87.1 million

	Sample	VOA Weekly Audience
<b>Sex</b>	%	%
Male	58	81
Female	42	19
<b>Age</b>		
15-24	32	20
25-34	30	37
35-44	18	21
45-54	11	14
55-64	5	6
65+	4	1

	Sample	VOA Weekly Audience
<b>Education</b>	%	%
None	16	4
Primary	40	31
Secondary	31	40
Vocational/Univ	13	26
<b>Ethnicity/Nationality</b>		
Oromo	35	29
Amhara	32	44
Guragi	9	8
Siadmo	7	4
Other	17	14

	Sample	VOA Weekly Audience
<b>Residence</b>	%	%
Urban	62	70
Rural	38	30
<b>Language Spoken At Home</b>		
Amharic	56	63
Afan Oromo	24	24
Tigrigna	1	1
Other	19	12

## M E D I A U S E



### Top Ten Media Outlets

1. ETV
2. Ethiopia Radio
3. FM Addis
4. ETV-2 Addis
5. Radio Fana FM
6. Sheger FM
7. FM Addis Admin
8. FM Awassa
9. VOA Horn of Africa
10. DW Amharic

### Top Ten Sources of News

1. Ethiopia Radio
2. ETV
3. Radio Fana
4. FM Addis 97.1
5. FM Awassa
6. SABC
7. DW
8. VOA
9. Sheger FM
10. ETV-2 Addis

### Web Analytics

<b>Weekly Visitors</b>	36,600
<b>Weekly Visits</b>	107,800

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): Ethiopia-NOT FREE; Eritrea-NOT FREE**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK**
- The Ethiopian People's Revolutionary Democratic Front (EPRDF) continued its strong dominance of the political environment in Ethiopia in 2011. While tensions in the Ethiopia-Eritrea border area continue, Ethiopians troops entered Somalia to fight against Al Shabab.
- Media access and use are politically sensitive issues in Ethiopia, making research difficult. People are often reluctant to discuss any sources of news critical of the government, for fear of reprisal. In addition, permission to conduct research must be granted not only by national government authorities, but also by each regional authority. The November 2011 survey constitutes the first quasi-nationwide BBG audience research project in years.
- Eritrea is a one-party state, holds no free elections and allows no private news media.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 56.60 (127/179)**
- Despite the opening of several private radio stations and newspapers (mostly government oriented), Ethiopia's media scene is still dominated by state-owned radio, TV, and newspapers. Private media houses and journalists have been subject to intimidation and arrest. Domestic media shy away from covering sensitive issues, such as the endemic corruption.
- The Ethiopian government continued to interfere with the signals of international broadcasters. Many Ethiopians use satellite TV to access international stations, including VOA audio programming.
- Eritrea remains at the very bottom of Reporters Without Borders Press Freedom Index. Freedom of opinion does not exist, and dissenting voices from the journalist community are swiftly arrested and detained for long periods.

P R O F I L E



**Language of Broadcast:** Indonesian

**Content:** 56 hrs. original radio programming per week; 3.4 hrs. original TV programming per week; Internet; Mobile

**Distribution:** The Indonesian Service employs an affiliate-based distribution system.

**Radio:** Over 250 AM/FM affiliate stations in 128 cities relay VOA Indonesian's programs including *Headline News*, *Breakfast and Evening Shows*, *VOA Direct Connection* and 24 additional short inserts ranging from business and economics to the environment to pop culture.

**TV:** The Service produces two long-form TV shows and 18 short TV segments for 8 of the 11 national TV stations and over 30 regional stations. *Dunia Kita*, a 30-minute human interest TV magazine show, is in its 11th season on Metro TV, Indonesia's version of CNN, a 24-hour news channel. TV produces special events coverage for major stories, e.g. U.S. elections or the death of Osama bin Laden.

**New Media:** The service has web and mobile sites and a daily headline news e-newsletter. The main Facebook page has over 725,000 fans, Dunia Kita alone has over 110,000 Facebook fans. The Service's YouTube page has over 4,000 videos with more than 2 million views and its Twitter feed has more than 25,000 followers.

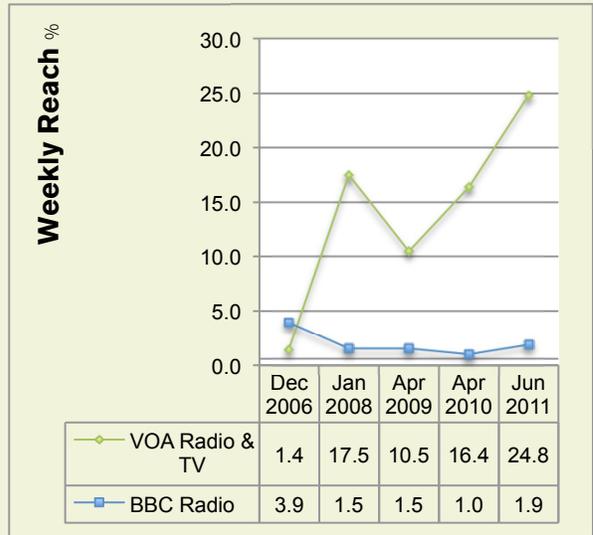
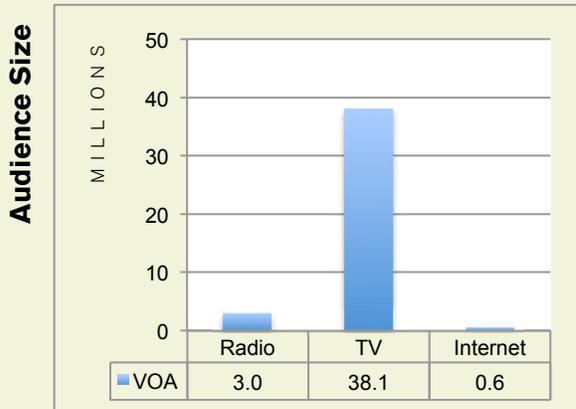
**Staff:** 43

**Budget:** \$5,933,000

**Established:** 1942 to present



P E R F O R M A N C E D A T A (Using Data from Indonesia, June 2011)



Weekly Reach by Media (%)	
<b>VOA</b>	
Radio	1.9
TV	24.6
Internet	0.4
<b>Total</b>	<b>24.8</b>

Awareness (%)	
<b>VOA</b>	
	12

Indonesian

Credibility	
Percentage of surveyed weekly audience that finds broadcasts credible (%)	
<b>VOA</b>	
Radio	85
TV	89

Understanding		
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	<b>VOA Radio</b>	<b>VOA TV</b>
Current Events	94	na
U.S. Culture	72	na
U.S. Policies	65	na

Quality	
Combined Scores from audience panel	
<b>VOA</b>	
Radio	3.2
TV	3.3

Data are from a June 2011 survey of adults (15+) in Indonesia. The survey covered 21 of 32 provinces and is representative of 93% of the adult population.

# Indonesian Broadcasting

## A U D I E N C E C O M P O S I T I O N

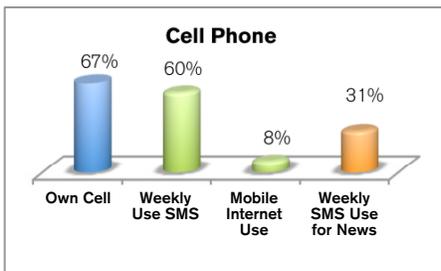
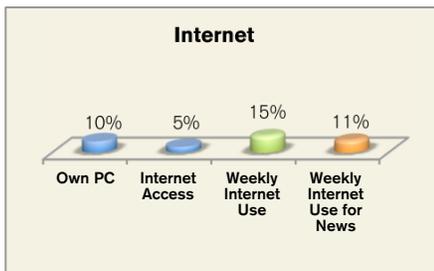
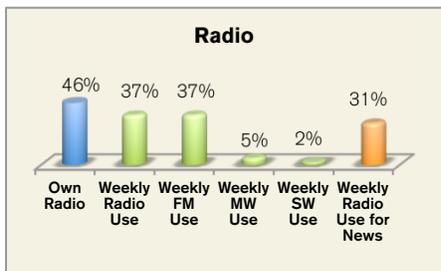
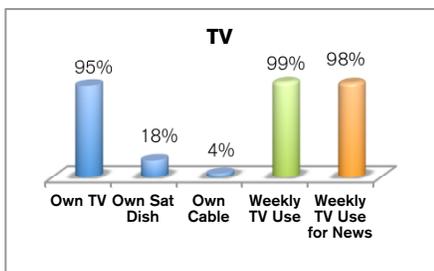
Total Population of Indonesia: 238.2 million

	Sample	VOA Weekly Audience
<b>Sex</b>	%	%
Male	50	48
Female	50	52
<b>Age</b>		
15-24	26	37
25-34	25	27
35-44	22	20
45-54	16	10
55-64	8	4
65+	3	1

	Sample	VOA Weekly Audience
<b>Education</b>	%	%
None	2	2
Primary	31	21
Secondary	29	28
Vocational	33	40
Higher	5	9
<b>Ethnicity/Nationality</b>		
Javanese	46	40
Sundanese	17	28
Other	37	32

	Sample	VOA Weekly Audience
<b>Residence</b>	%	%
Urban	44	52
Rural	56	48
<b>Language</b>		
Javanese	38	33
Bahasa Indonesian	18	25
Sundanese	15	17
Other	27	24

## M E D I A U S E



### Top Ten Media Outlets

1. RCTI
2. SCTV
3. Indosiar
4. Trans TV
5. Trans 7
6. TV One
7. ANTeve
8. Global TV
9. Metro TV
10. TVRI

### Top Ten Sources of News

1. RCTI
2. SCTV
3. Metro TV
4. TV One
5. Indosiar
6. Trans TV
7. TVRI
8. ANTeve
9. Global TV
10. Jawa Post

### Web Analytics

Weekly Visitors	21,700
Weekly Visits	28,400

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- Just over a decade ago Indonesia's economy virtually collapsed during the Asian financial crisis. The value of the rupiah plummeted, property prices dropped, and millions of Indonesians saw their wealth erode overnight. That, and a growing discontent with the former President Suharto's authoritarian regime, led to Indonesia moving to a democracy from the dictatorship it had been for more than 30 years.
- President Susilo Bambang Yudhoyono was first elected on promises to tackle graft - but the latest figures in Transparency International's Corruption Perception Index are not particularly encouraging about the progress he has made. The index shows that Indonesia scored 2.8 out of 10 - the same as in 2009 when he was re-elected. One of the worst affected areas by these twin problems is infrastructure. Indonesia desperately needs more roads, ports and highways to reach its full potential.

### Media Environment

- **Freedom House Press Freedom Index (2011): PARTLY FREE**
- **Reporters Without Borders Index (2011): 68.00 (146/179)**
- Official censorship of mass media content is rare in Indonesia. However, journalists risk violence and intimidation when they cover corruption or other sensitive topics affecting high-ranking government officials and prominent entrepreneurs.
- Subscription-based cable and satellite television services are growing slowly. Overall, household cable access is at 4 percent (no increase from last year). Satellite television has grown much more rapidly than cable, specifically in rural areas, probably because of its improved TV signal in remote locations. Overall, 18 percent of households in Indonesia have a satellite dish; 25 percent of rural households have a satellite dish compared to 10 percent of urban households.
- Internet access in households is at a fairly low level: overall, 5 percent of households have Internet access, but this figure includes those households that have a mobile phone with Internet access. Less than 3 percent of households have a wired Internet connection at home.

P R O F I L E



**Languages of Broadcast:** Kazakh, Russian

**Content:** 8.25 hrs. of original and 6 hrs. of repeat radio programming per hour; Internet

**Distribution:** 1 affiliate (1 MW & UKW), 2 IBB SW frequencies

RFE/RL's delivery includes 1 UKV affiliate in 3 cites, multiple SW frequencies, Yamal and AsiaSat.

**New Media:** Complete bi-lingual Kazakh and Russian websites with streaming audio, Facebook, YouTube, Twitter and mobile site.

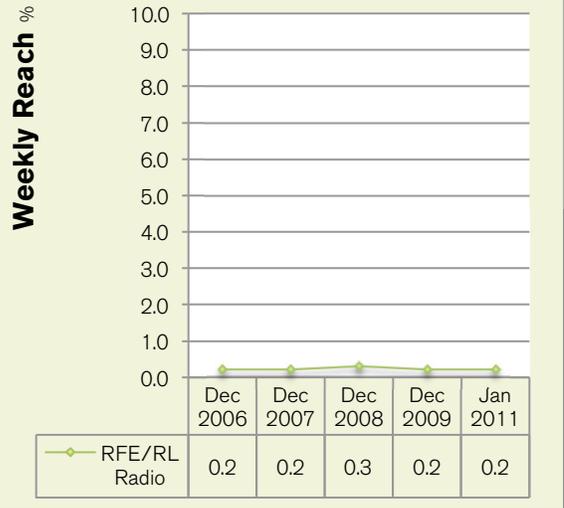
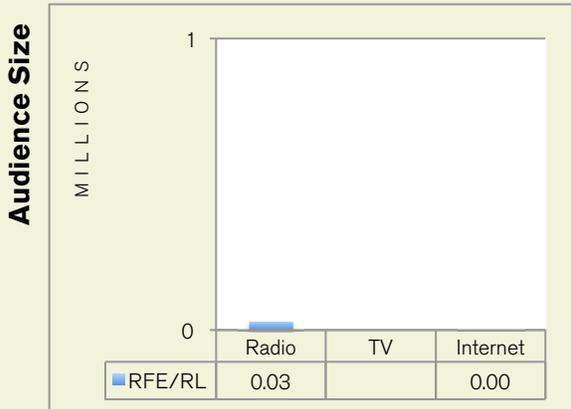
**Staff:** 9

**Budget:** \$1,702,000

**Established:** 1953 to present



P E R F O R M A N C E D A T A (Using Data from Kazakhstan, January 2011)



Weekly Reach (%) by Media	
	RFE/RL
Radio	0.2
TV	na
Internet	0.1
<b>Total</b>	<b>0.2</b>

Awareness (%)	
	RFE/RL
	8

Kazakh

Credibility	
Percentage of surveyed weekly audience that finds broadcasts credible (%)*	
	RFE/RL
Radio	na
TV	na

Understanding	
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)*	
	RFE/RL
Current Events	na
Current Events in Kazakhstan	na
U.S. Policies	na

Quality	
Combined Scores from audience panel	
	RFE/RL
Radio	2.9
Internet	3.5

\* Sample of weekly RFE/RL listeners is too small for meaningful analysis.

Data are from a January 2011 nationwide survey of adults (15+) in Kazakhstan.