



Broadcasting Board of Governors

# Annual Language Service Review Briefing Book







# Table of Contents

Acknowledgments.....	3
Preface.....	5
How to Use This Book .....	6
Albanian.....	12
Albanian to Kosovo.....	14
Arabic.....	16
Armenian.....	22
Azerbaijani.....	24
Bangla.....	26
Belarusian.....	28
Bosnian.....	30
Burmese.....	32
Cantonese.....	34
Central Africa.....	36
Creole.....	38
Dari.....	40
English.....	42
English to Africa.....	44
French to Africa.....	46
Georgian.....	48
Greek.....	50
Hausa.....	52
Horn of Africa.....	54
Indonesian.....	56
Kazakh.....	58
Khmer.....	60
Korean.....	62
Kurdish.....	64
Kyrgyz.....	66
Lao.....	68
Macedonian.....	70
Mandarin.....	72
Moldovan.....	74
Montenegrin.....	76
Pashto.....	78
Persian.....	80
Portuguese to Africa.....	82
Russian.....	84
Russian North Caucasus.....	86
Serbian/Montenegrin.....	88
Somali.....	90
Spanish to Cuba.....	92
Spanish to Latin America.....	94
Swahili.....	96
Tajik.....	98
Tatar-Bashkir.....	100
Thai.....	102
Tibetan.....	104
Turkish.....	106
Turkmen.....	108
Ukrainian.....	110
Urdu.....	112
Uyghur.....	114
Uzbek.....	116
Vietnamese.....	118
Zimbabwe.....	120





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## Acknowledgments

The BBG wishes to acknowledge and thank the many staff across the agency whose collective labors have produced this book. InterMedia, BBG's research contractor populated the pages with data and originated media and political environment language. BBG research manager Leah Ermarth led the research team in confirming the data and in writing and editing text. That team included BBG senior strategist Paul Marszalek, entity research directors Bill Bell, Betsy Henderson, Paul Tibbitts, and Diana Turecek and BBG staffer Erika Orban, who drafted many of the text blocks. Jenny Lea Ramsey in IBB Graphics edited the pages through multiple iterations. Finally, management and staff at each of the entities devoted considerable time in reviewing the service profiles and offering edits and new language. The Board is very grateful to the assistance of all involved.





## Preface

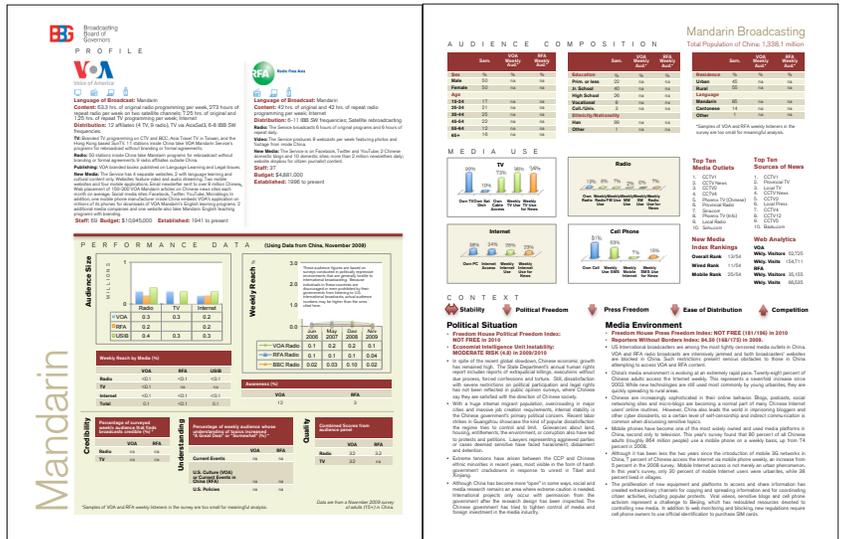
This is the briefing book for 2011 in support of the BBG's congressionally mandated, annual review of all broadcast language services – the process known as Language Service Review.

The book provides BBG governors, managers and employees with quick access to core performance and other data for all language services as well as relevant data and information regarding the media and political environments in which the services operate. While such information is already available across the agency through routine research reports, there is added value in a ready reference document.

This marks the ninth year that the BBG has produced some version of this book. This two-page layout replaces the previous one-page design, and many data points expressed as numbers before are now represented in graphs and charts. All this aims at making the book simpler and easier to use.

It bears noting that the BBG does not attempt to evaluate the performance of the language services based only on a few indicators, regardless of their relevance. The BBG research program yields a host of other data that are fully factored into both program reviews at the broadcast entities and the Language Service Review conducted by the Board.

The Language Service Review Briefing Book is designed to give an overview of the broadcasting environment, programming, and performance of each language in which the BBG broadcasts during the fiscal year under review. This section will explain what is measured and reported in each section and how to interpret the graphic indicators. All survey data are current through FY2011 while profile and context sections are current through Spring 2012.



## Profile Section

**A Media Icons** identify the platforms for which the relevant language service produces content.



P R O F I L E

**Language of Broadcast:** Mandarin

**Content:** 63.3 hrs. of original radio programming per week, 273 hours of repeat radio per week on two satellite channels; 7.25 hrs. of original and 1.25 hrs. of repeat TV programming per week; Internet

**Distribution:** 12 affiliates (4 TV, 9 radio), TV via AsiaSat3, 6-8 IBB SW frequencies.

**TV:** Branded TV programming on CTV and BCC, Asia Travel TV in Taiwan, and the Hong Kong based SunTV. 11 stations inside China take VOA Mandarin Service's programs for rebroadcast without branding or formal agreements.

**Radio:** 50 stations inside China take Mandarin programs for rebroadcast without branding or formal agreements. 9 radio affiliates outside China.

**Publishing:** VOA branded books published on Language Learning and Legal Issues.

**New Media:** The Service has 4 separate websites, 2 with language learning and cultural content only. Websites feature video and audio streaming. Two mobile websites and four mobile applications. Email newsletter sent to over 8 million Chinese. Web placement of 150-200 VOA Mandarin articles on Chinese news sites each month on average. Social media sites: Facebook, Twitter, YouTube, Microblogs. In addition, one mobile phone manufacturer inside China embeds VOA's application on millions of its phones for downloads of VOA Mandarin's English learning programs. 2 additional media companies and one website also take Mandarin English teaching programs with branding.

**Staff:** 69 **Budget:** \$10,000,000 **Established:** 1941 to present

**Language of Broadcast:** Mandarin

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

**Distribution:** 6-11 IBB SW frequencies; Satellite rebroadcasting

**Video:** The Service produces 8 webcasts per week featuring photos and footage from inside China.

**New Media:** The Service is on Facebook, Twitter and YouTube; 2 Chinese domestic blogs and 10 domestic sites; more than 2 million newsletters daily; website Dropbox for citizen journalist content.

**Staff:** 37

**Budget:** \$4,881,000

**Established:** 1996 to present

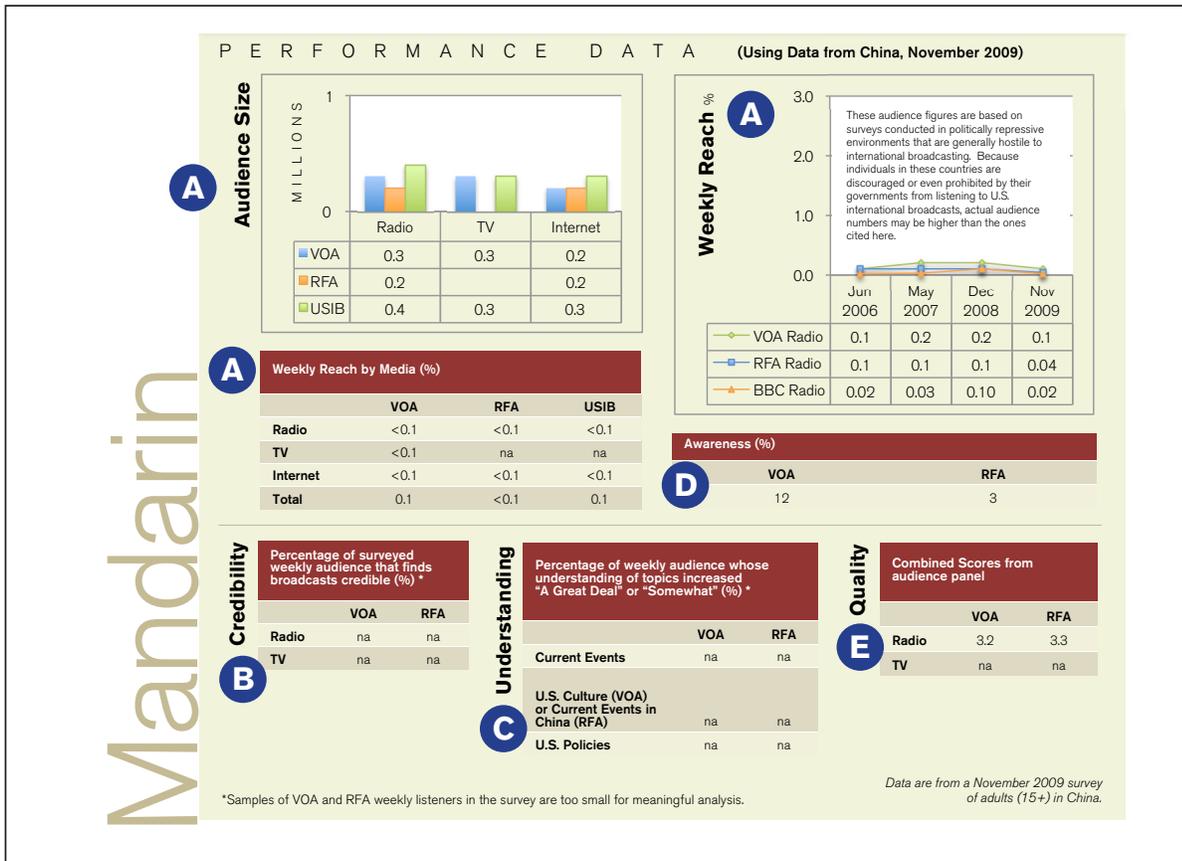
**B Affiliates** summarize broadcast partners, although those itemized in the distribution section do not include the many small or transitory stations defined as 'low impact' by the Office of Marketing and Placement.

**C Staff** figures are FY2011, actuals, unless otherwise noted.

**D Budget** figures include FY2011 employee salaries, benefits and general operating expenses for each language service.

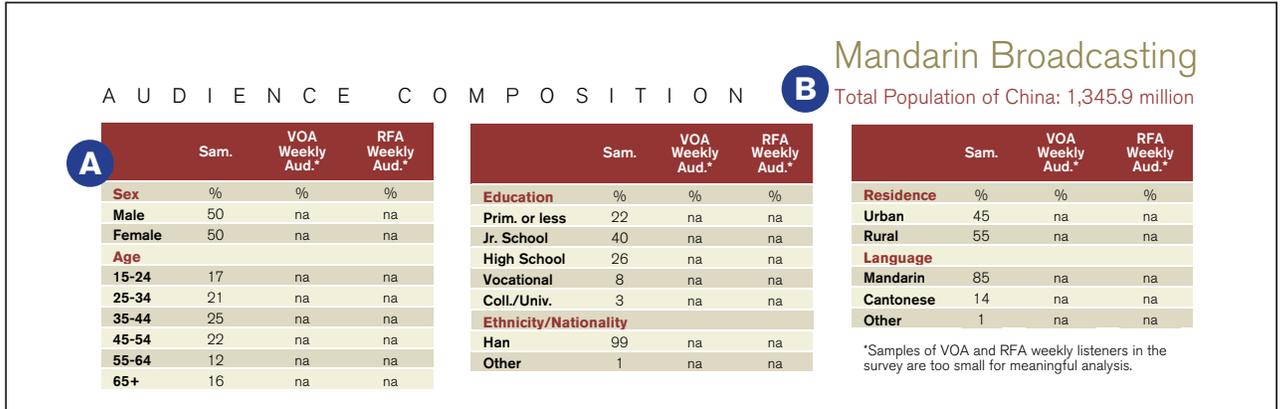
**E Map** generally display services' target countries for broadcast and/or the source of national market and performance data found in subsequent tables and charts.

# Performance Data Section



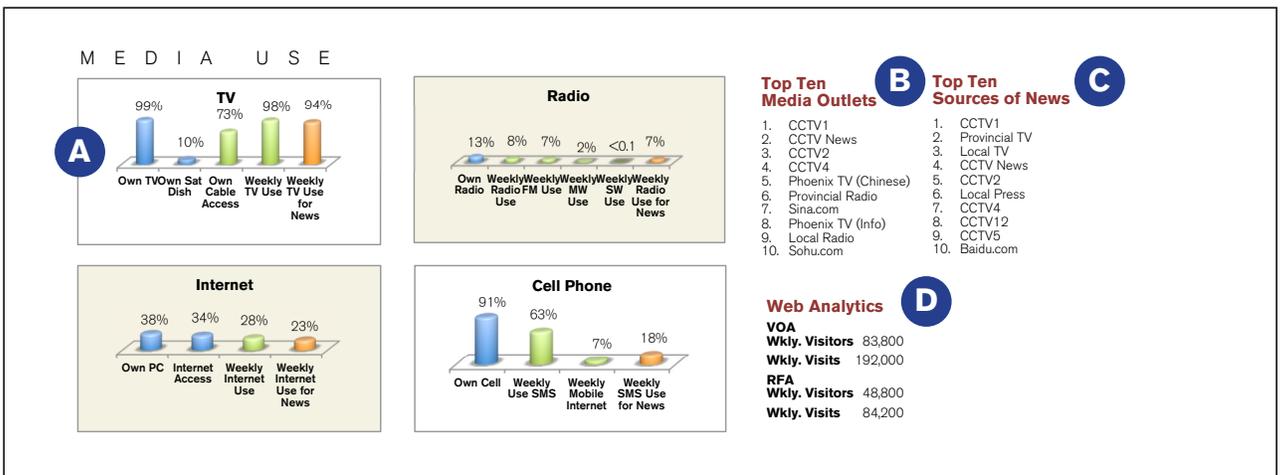
- Data in this section reflect the agency's core performance measures of **Weekly Reach A** (in numbers as well as a percentage of the adult population), **Credibility B** of programming and **Understanding C** of current events and other mission-related topics (both as percentage of weekly audience), by language service. USIB indicates total unduplicated figures for U.S. International Broadcasters where there is language overlap.
- When available, multi-year shifts in reach of U.S. Broadcasters and key competitors is shown in the trend graph in the upper right . Unless otherwise noted in the table below the trend graph, broadcaster weekly reach includes all media platforms.
- Also shown are two other important indicators: **Awareness D** and **Quality E** . Awareness figures reflect the percentage of the population that has heard of the broadcaster, either prompted or unprompted. Quality scores reflect the weighted combined score of internal and external evaluation panels who rate programming for both content and production quality on a scale of 1(poor) to 4 (excellent).
- Data in this section come from the most recent survey in 1 or 2 target countries of the service. Some language services, by definition, target only one country. Others target multiple countries, though not every such service gets a survey in each country every year. In the case of Arabic, however, the BBG conducts annual surveys in 5-12 countries. Two surveys are featured on the Arabic page while data from other countries surveyed can be found in an addendum spreadsheet.

## Audience Composition Section



- A** Tables in this section describe what we know of the adult population 15 years and older (in the 'Sample' column), side by side with what we know about our respective broadcaster audiences. The standard demographic indicators: sex, age, education, ethnicity, residence and language are also displayed. 'Language' indicates the language spoken most at home.
- B** The **Total Population** of each target country, found in the upper right, is based on validated data from the Population Reference Bureau. This reflects the total population, including those less than 15 years old.

## Media Use Section



- A** In the TV, Radio, Internet and Cell Phone bar charts, blue bars indicate ownership, or more specifically, 'access in the household'. Green bars indicate use of a particular medium at least once per week, and orange bars indicate at least weekly use of that medium for news, regardless of ownership.
- B** **Top Ten Media Outlets** lists the local media outlets that have the greatest daily reach, from highest to lowest, regardless of their news content. Daily reach reflects the percentage of the adult population that tuned into that station the 'yesterday' at the time of the survey. 'Yesterday' listening or viewing is a common proxy for 'daily' listening or viewing in audience research.

- C** ▪ **Top Ten Sources of News** reflects the most frequently cited sources of news, regardless of platform, from highest to lowest. While different from reach, this measure is a very important indicator of impact for our broadcasters. If a page highlights two target countries, top sources of news for both are typically displayed, although are omitted for target countries where researchers cannot ask this question.
- D** ▪ Google Analytics is the source of the **Web Analytics** data for all broadcasters. 'Weekly Visitor' describes the number of unique weekly visitors to a broadcaster's website. 'Weekly Visits' describes the number of total visits to that site in one week. Visits and visitors from USIB IP addresses (agency computers) are filtered out of these figures.

## Context Section

C O N T E X T

**A** ↔ **Stability**

↓ **Political Freedom**

↓ **Press Freedom**

↓ **Ease of Distribution**

↑ **Competition**

### Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK**
- While China has continued to grow during the global economic slowdown, the recent purge of a popular Politburo member Bo Xilai and blind activist Chen Guangcheng's sheltering at the U.S. Embassy in Beijing have exposed serious cracks in the regime as it begins a delicate transition of power. Corruption charges against Bo expose the kind of abuses of power that extend to other top leaders.
- The State Department's annual human rights report includes reports of extrajudicial killings, executions without due process, forced confessions and torture. Still, dissatisfaction with severe restrictions on political participation and legal rights has not been reflected in public opinion surveys, where Chinese say they are satisfied with the direction of Chinese society.
- 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. Grievances about land, housing, entitlements, the environment, or corruption also have led to protests and petitions. Lawyers representing aggrieved parties or cases deemed sensitive have faced harassment, disbarment and detention.
- Extreme tensions have arisen between the CCP and Chinese ethnic minorities in recent years, most visible in the form of harsh government crackdowns in response to unrest in Tibet and Xinjiang.
- Although China has become more "open" in some ways, social and media research remains an area where extreme caution is needed. International projects only occur with permission from the government after the research design has been inspected. The Chinese government has tried to tighten control of media, including microblogs and instant messaging, and foreign investment in the media industry.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 136.00 (174/179)**
- U.S. International broadcasters are among the most tightly censored media outlets in China. VOA and RFA radio broadcasts are intensively jammed and both broadcasters' websites are blocked in China. Such restrictions present serious obstacles to those in China attempting to access VOA and RFA content.
- CCTV remains the top source of news for most Chinese. Satellite dish ownership was measured at 10 percent in 2009 with 90 percent of satellite owners living in rural areas.
- China's media environment is evolving at an extremely rapid pace. Internet World Statistics suggests more than half a billion Chinese, 38 percent of its massive population, are using the Web. New technologies are quickly spreading beyond cities to rural areas, where 3G mobile phones are fueling Web growth.
- Blogs, podcasts, social networking sites and micro-blogs are becoming a normal part of many Chinese Internet users' online routines. However, China also leads the world in imprisoning bloggers and other cyber dissidents, so a certain level of self-censorship and indirect communication is common when discussing sensitive topics.
- The proliferation of new equipment and platforms to access and share information has created extraordinary channels for copying and spreading information and for coordinating citizen activities, including popular protests. Viral videos, sensitive blogs and cell phone activism represent a challenge to Beijing, which has redoubled resources devoted to controlling new media. In addition to web monitoring and blocking, new regulations require cell phone owners to use official identification to purchase SIM cards.
- In spite of an aggressive campaign to control online discussion, China's domestic internet sites including QQ, Baidua and Sina are key sources of news and provide forums for the discussion of current events.

- A** ▪ Red arrows quickly describe the state of five key elements in the target country or region. Down arrows imply a poor or declining state, up arrows a good or increasing state, and sideways arrows a middling or static state.
- The states of **Stability**, **Political** and **Press Freedom** are based on both respected external indices, such as Freedom House and the Economist Intelligence Unit, and the judgment of analysts familiar with BBG audience research from that market. (Note: Economist Intelligence Unit had not updated their index of 2011 by publication date.) States of **Ease of Distribution** and **Competition** are based on audience data and the experience of the service. Rarely is any market experiencing a decrease in media competition, even those under heavy state control.





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## Language Service Profiles A-Z

P R O F I L E



**Language of Broadcast:** Albanian

**Content:** 10.5 hrs. of original radio and 3.5 hrs. of original TV programming per week – an additional 0.25 hrs. of TV broadcasting to Albania per week; Internet

**Distribution:** 70 affiliates (41 TV, 29 radio), 2 IBB FM and 1 IBB SW frequency

**Radio:** The service's radio programs are carried by 29 affiliates in Albania, Kosovo, and Macedonia and by 2 IBB FMs, as well as on an IBB SW frequency.

**TV:** VOA Albanian broadcasts are carried by 18 TV affiliates in Albania, 11 in Macedonia, 9 in Kosovo, 2 in Montenegro, and 1 in Serbia. Two weekly interactives are carried separately by the most popular TV station in Albania, Top Channel, and by the most popular news station, News 24.

**Web:** The Service has an Internet site and a mobile site, and content is available on Twitter, Facebook and YouTube. It also sends out a daily newsletter to more than 5,000 subscribers.

**Staff:** 11

**Budget:** \$1,863,000

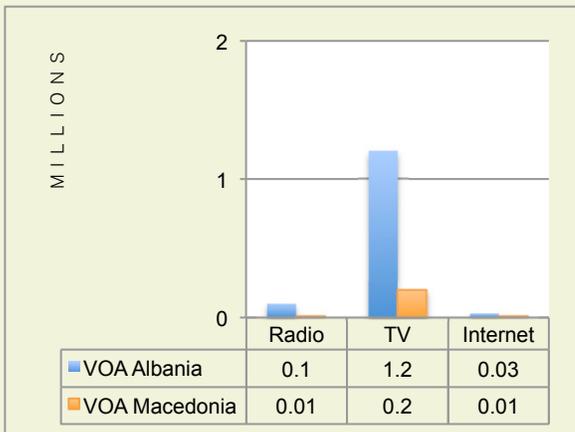
**Established:** 1943 to 1945; 1951 to present; TV service established in 1999



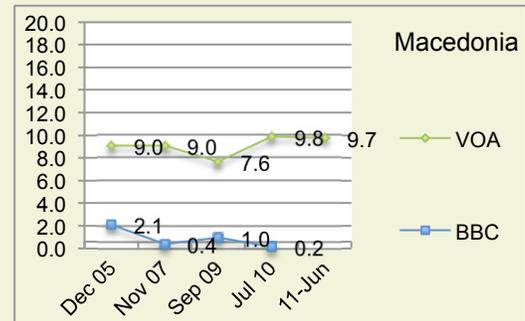
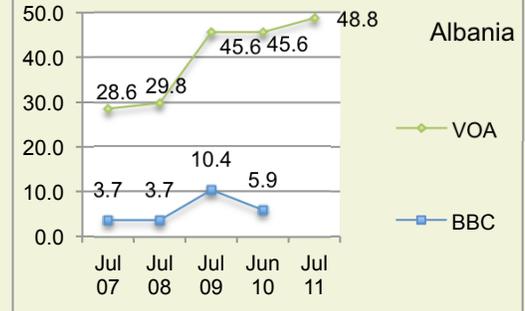
P E R F O R M A N C E D A T A

(Using Data from Albania, July 2011 & Macedonia, June 2011)

**Audience Size**



**Weekly Reach %**



Weekly Reach by Media (%)		
	Albania	Macedonia
Radio	5.0	.7
TV	47.1	9.6
Internet	1.1	0.4
<b>Total</b>	<b>48.8</b>	<b>9.7</b>

Awareness (%)		
	Albania	Macedonia
Radio	70	74

**Credibility**

Percentage of surveyed weekly audience that found broadcasts credible (%)		
	Albania	Macedonia
Radio	96	na**
TV	99	99

**Understanding**

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	VOA TV** Albania	VOA TV*** Macedonia
Current Events	94	95
U.S. Culture	73	83
U.S. Policies	85	69

**Quality**

Combined Scores from audience panel	
	VOA
Radio	3.6
TV	3.3

\* Among the 24% who are ethnic Albanians, VOA's weekly reach is 38.5%.  
 \*\*In Albania, understanding ratings for VOA radio are: 94% for Current Events; 82% for U.S. Society; and 81% for U.S. Policies.  
 \*\*\*In Macedonia, samples of VOA Albanian weekly radio listeners are too small for meaningful analysis.

Data are from an July, 2011 survey of adults (15+) in Albania and a June, 2011 survey of adults (15+) in Macedonia.

Albanian

# Albanian Broadcasting

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

Total Population of Target Country: Albania 3.2 M and Macedonia 2.1 M

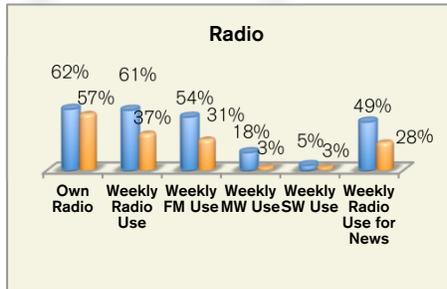
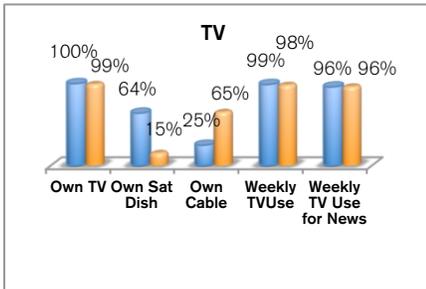
	Alb. Sam.	Alb. Wkly. Aud.	Mac. Sam.	Mac. Wkly. Aud.
<b>Sex</b>	%	%	%	%
Male	50	52	50	59
Female	50	48	50	41
<b>Age</b>				
15-24	25	18	19	23
25-34	18	15	19	22
35-44	17	19	18	24
45-54	17	20	17	14
55-64	12	15	14	10
65+	10	12	14	7

	Alb. Sam.	Alb. Wkly. Aud.	Mac. Sam.	Mac. Wkly. Aud.
<b>Educ</b>	%	%	%	%
None	2	2	36	40
Elem/Sec	35	31	na	na
Upper Sec	46	46	51	44
Higher	18	21	13	15
<b>Ethnicity/Nationality</b>				
Albanian	98	99	24	3
Maced.	na	na	65	96
Other	2	1	10	1

	Alb. Sam.	Alb. Wkly. Aud.	Mac. Sam.	Mac. Wkly. Aud.
<b>Residence</b>	%	%	%	%
Urban	47	49	43	75
Rural	53	51	57	25
<b>Language Spoken at Home</b>				
Albanian	98	99	24	96
Macedonian	na	na	71	3
Other	2	1	5	1

## M E D I A U S E

Albania Macedonia

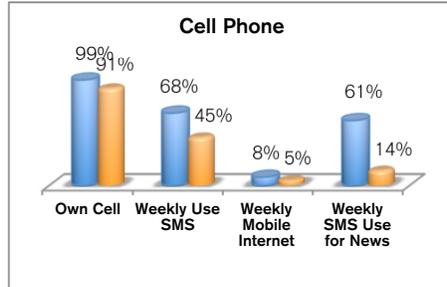
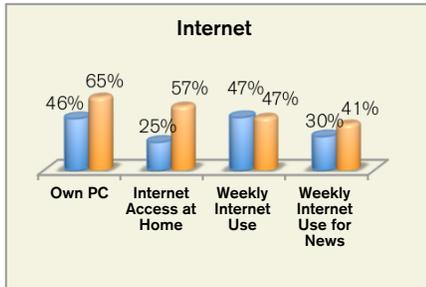


### Albania Top Ten Sources of News

1. Top Channel
2. Vizion Plus
3. News 24
4. TV Klan
5. TVSH
6. Google
7. Shekulli
8. Top AIB
9. Panorama
10. Yahoo

### Macedonia Top Ten Sources of News

1. A1 TV
2. Sitel TV
3. Kanal 5
4. Alsat TV
5. Macedonian TV 1
6. Google
7. Dnevnik
8. Facebook
9. Telma
10. Vest



### Web Analytics

<b>Weekly Visitors</b>	14,200
<b>Weekly Visits</b>	32,000

## C O N T E X T

↓ Stability   ↔ Political Freedom   ↓ Press Freedom   ↑ Ease of Distribution   ↑ Competition

### Political Situation

- **Freedom House Political Freedom Index (2011):** Albania–PARTLY FREE; Macedonia–PARTLY FREE
- **Economist Intelligence Unit Instability (2010):** Albania–HIGH RISK; Macedonia–HIGH RISK
- The Albanian prime minister, Sali Berisha, and his center-right Democratic Party of Albania (DPA) continue to rely on the support of their long-standing political adversary, Ilir Meta, whose Socialist Movement for Integration (SMI) is the junior coalition partner. The SMI's position is precarious, however, with Mr. Meta facing corruption allegations since early 2011.
- Lulzim Basha, the candidate of the DPA and winner by of the mayoral election in the capital, Tirana, took the oath of office on July 25th, two and a half months after polling day. The long delay before Mr. Basha could assume office stemmed from a dispute over the election result. One of the two major political forces – the Socialist Party – boycotted parliament and held rallies over allegations of wide-spread fraud by the rival Democratic Party.
- Animosities between the two major political players are hindering long-awaited economic and social reforms. The country's economy is in dire straits and remittances from emigrants, a large number of whom work in debt-ridden Italy and Greece, have been shrinking. Endemic corruption and unemployment remain major issues of concern among the public.
- The political stalemate is likely to hurt Albania's chances for European Union candidacy status, by the end of 2012, the first step towards an eventual membership, as well as expectations for visa-free travel within the Schengen area.

### Media Environment

- **Freedom House Press Freedom Index (2011):** Albania–PARTLY FREE; Macedonia–PARTLY FREE
- **Reporters Without Borders Index (2011):** Albania–34.44 (96/179); Macedonia–31.67 (94/179)
- Media freedom in Albania has regressed in the past year. This is evident in a number of incidents of favoritism and intimidation, but also in the assessment of media freedom watchdog groups. IREX has lowered its media freedom rating of Albania citing "an alliance between the government and powerful business interests against media freedom." The ensuing self-censorship among journalists is a widespread problem. Important issues, such as corruption, might not get the share of investigative reporting they deserve.
- The OSCE is also concerned about media freedom in Albania. The organization has issued warnings when Top Channel received a fine for airing a tape showing a former minister in a compromising situation abusing his power. Lawmakers from the opposition Socialist Party (PS) protested against material on TVSH, accusing the government of misusing the public broadcaster for propaganda purposes.
- Still, focus group participants pointed out increased professionalism of domestic news programs, making them more competitive against international broadcasters. However, they are frustrated with the sensationalism, bias and manipulation still seen in some domestic outlets.

P R O F I L E



Voice of America®



**Language of Broadcast:** Albanian

**Content:** 10.5 hrs. of original radio and 3.5 hrs. of original TV programming per week – an additional 0.25 hrs. of TV broadcasting to Albania per week; Internet

**Distribution:** 70 affiliates (41 TV, 29 radio), 2 IBB FM and 1 IBB SW frequency

**Radio:** The service's radio programs are carried by 29 affiliates in Albania, Kosovo, and Macedonia and by 2 IBB FMs, as well as on an IBB SW frequency.

**TV:** VOA Albanian broadcasts are carried by 18 TV affiliates in Albania, 11 in Macedonia, 9 in Kosovo, 2 in Montenegro, and 1 in Serbia. Two weekly interactives are carried separately by the most popular TV station in Albania, Top Channel, and by the most popular news station, News 24.

**Web:** The Service has an Internet site and a mobile site, and content is available on Twitter, Facebook and YouTube. It also sends out a daily newsletter to more than 5,000 subscribers.

**Staff:** 11

**Budget:** \$1,863,000

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



**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 Montenegro: 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 branded YouTube pages in process.



**Staff:** 12†

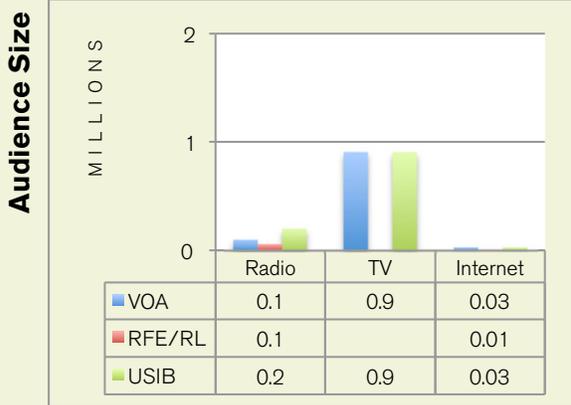
**Budget:** \$4,525,000†

**Established:** 1994 to present

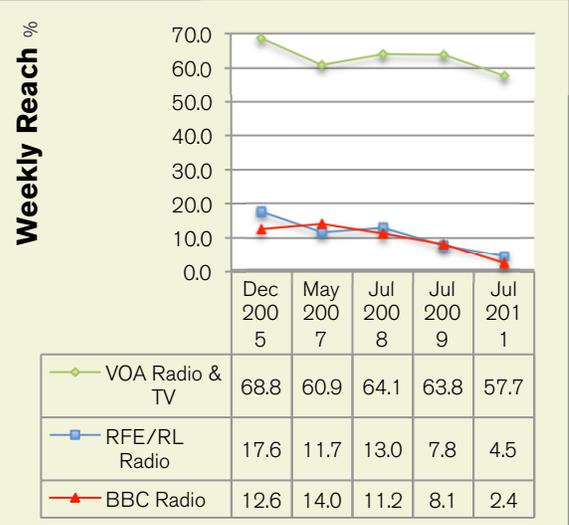
† Numbers reflect RFE/RL Balkans service totals which include Albanian, Bosnian, Croatian, Macedonian, Montenegrin and Serbian.

Albanian to Kosovo

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



Weekly Reach by Media (%)			
	VOA	RFE/RL	USIB
Radio	8.4	3.9	10.5
TV	55.6	na	55.6
Internet	1.9	0.7	2.2
Total	57.7	4.5	58.2



Awareness (%)	
VOA	RFE/RL
80	73

Credibility	Percentage of surveyed weekly audience that finds broadcasts credible (%)	
	VOA	RFE/RL
	Radio	97
TV	98	na

Understanding	Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	VOA TV*	RFE/RL**	
	Current Events	94	78
	U.S. Society (VOA)/Current Events in Kosovo (RFE/RL)	70	78
U.S. Policies	69	na	

Quality	Combined Scores from audience panel	
	VOA	RFE/RL
	Radio	3.6
TV	3.3	na

\*Understanding ratings for VOA TV are 94% for Current Events, 70% for U.S. Culture and 68% for U.S. Policies.  
\*\*Understanding ratings are for RFE/RL Albanian on any platform.

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

# Albanian to Kosovo Broadcasting

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

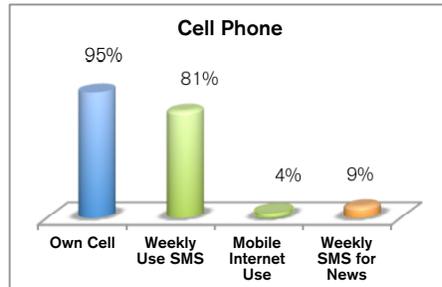
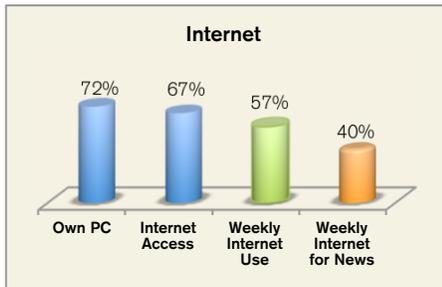
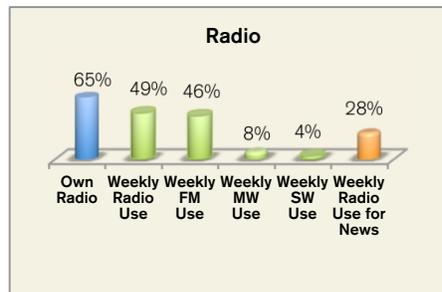
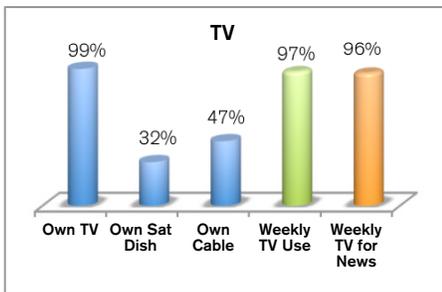
Total Population of Kosovo: 2.3 million

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
<b>Sex</b>	%	%	%
<b>Male</b>	49	54	66
<b>Female</b>	51	46	34
<b>Age</b>			
<b>15-24</b>	31	28	18
<b>25-34</b>	22	23	33
<b>35-44</b>	17	17	20
<b>45-54</b>	13	14	16
<b>55-64</b>	9	10	9
<b>65+</b>	8	8	4

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
<b>Education</b>	%	%	%
<b>None</b>	3	3	1
<b>Primary</b>	38	36	21
<b>Secondary</b>	45	46	57
<b>Coll./Univ.</b>	13	15	21
<b>Ethnicity/Nationality</b>			
<b>Albanian</b>	86	92	77
<b>Serbian</b>	5	<1	1
<b>Other</b>	9	8	22

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
<b>Residence</b>	%	%	%
<b>Urban</b>	44	46	53
<b>Rural</b>	56	54	47
<b>Language</b>			
<b>Albanian</b>	94	99	98
<b>Serbian</b>	5	<1	<1
<b>Other</b>	1	1	2

## M E D I A U S E



### Top Ten Media Outlets

1. RTK
2. RTV 21
3. KTV Koha Vizion
4. VOA TV
5. TV Klan Kosova
6. Radio Dukagjini
7. Top Channel
8. Radio 21
9. Radio Kosova
10. TVSH

### Top Ten Sources of News

1. RTK
2. RTV 21
3. Koha Vision
4. Koha Ditore
5. Google
6. TV Klan Kosova
7. Kosova Sot
8. Telgeati.com
9. VOA TV
10. RTS Serbia

### Web Analytics

<b>VOA Weekly Visitors</b>	14,200
<b>Weekly Visits</b>	32,000
<b>RFE/RL Weekly Visitors</b>	8,900
<b>Weekly Visits</b>	36,800

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): Partly Free**
- **Economist Intelligence Unit Instability (2010): NA**
- EU-mediated talks between Serbia and Kosovo were called off in September amid heightened tension in northern Kosovo. Talks had been postponed after 16 ethnic Serbs and four NATO peacekeepers were hurt in clashes in an ongoing dispute over border crossings. NATO said troops had used tear gas and rubber bullets after pipe bombs were fired at positions in northern Kosovo.
- The European Commission has recommended Serbia for EU candidate status but said talks could only start after it normalized ties with Kosovo.
- Belgrade refuses to recognise the territory's self-declared independence and tension involving Kosovo's ethnic Serbs sparked violence this summer.
- A European Union panel agreed to appoint a special prosecutor to probe allegations of organ trafficking and other abuses linked to former commanders of the Kosovo Liberation Army, including current prime minister, Hashim Thaci. Under a plan endorsed in June by EU officials in Brussels, the prosecutor will lead a seven-member international "task force" attached to the EU's rule of law mission in Kosovo (EULEX), according to diplomatic sources.

### Media Environment

- **Freedom House Press Freedom Index (2011): Partly Free**
- **Reporters Without Borders Index (2011): 30.00 (86/179)**
- Television viewing was slightly higher in 2011 compared to the previous year—87 percent of Kosovo adults reported watching TV "yesterday" compared to 84 percent in 2010. On a weekly basis, however, viewership remained statistically unchanged at 97 percent. TV viewing for news and current information was also statistically unchanged from the previous year (96 percent compared to 95 percent).
- Radio plays a minor role as a news source in Kosovo. In 2011, its weekly use as a source of news and information declined even further from 33 percent to 28 percent. At present, radio ranks fourth among information sources in Kosovo. Apart from TV, radio is overshadowed by the internet (used weekly for news and information by 40 percent of Kosovo adults) and newspapers (36 percent).
- Aside from TV, the internet was the only medium that continued to grow in one way or another, bolstered by demand from Kosovo's young population and intense competition in a tight market. Within a year, household internet access in Kosovo has grown from 61 percent to 67 percent, and computer ownership from 68 percent to 72 percent. Although "last-week" internet use stood at 57.3 percent in 2011 (statistically unchanged from 57 percent the previous year), the internet sector saw two important developments: the use of the internet for news and current information continued to grow, from 37 percent to 40 percent; and broadband penetration continued to expand, opening up further possibilities for online users.

P R O F I L E

MIDDLE EAST BROADCASTING NETWORKS, INC. **MBN**



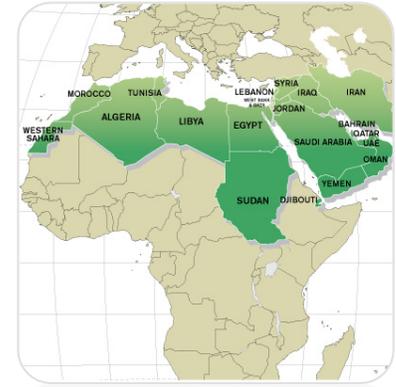
**Language of Broadcast:** Arabic

**Content:** Radio Sawa: 24/7 original programming; Alhurra TV: 84 hrs. of original and 84 hrs. of repeat TV programming per week; Internet

**Distribution:** Sawa: 4 IBB MW and 41 FM frequencies, satellite and the Internet. Alhurra TV: Satellite, 6 terrestrial TV stations in Iraq and the Internet

**New Media:** Radio Sawa's news and information Website provides live streaming and archives of the latest newscasts. Its mobile Website and Facebook fan page provide headlines and encourages listeners to comment on stories. Twitter feeds the latest Sawa headlines. RadioSawa also posts key interview clips and reports on Audioboo.

Alhurra's Website provides the latest news, live streaming and archived video of most programs. It has a mobile website, Alhurra and key program Facebook pages as well as over 13 fan pages. Twitter feeds include one for the network, one for breaking news, one for flagship program Al Youm, and a YouTube channel at [www.youtube.com/alhurra](http://www.youtube.com/alhurra).



**Staff:** 498

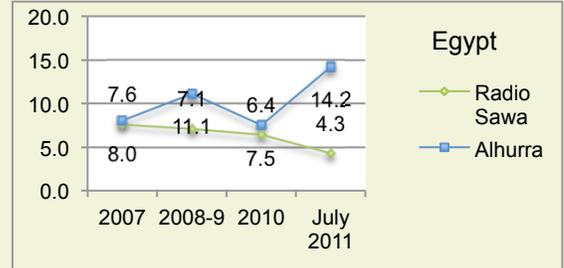
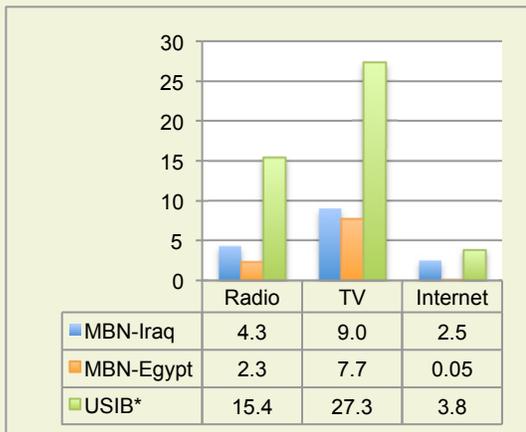
**Budget:** \$110,332,000†

**Established:** Radio Sawa; 2002 to present; Alhurra TV 2004 to present

† includes additional indirect costs

P E R F O R M A N C E D A T A (Using Data from Iraq, March 2011 & Egypt, July 2011)

**Audience Size**



Weekly Reach by Media (%)		
	MBN-Iraq	MBN-Egypt
Radio	23.2	4.3
TV	48.5	14.7
Internet	14.1	1.0
Total	63.0	17.6

Awareness (%)			
Sawa Iraq	Alhurra Iraq	Sawa Egypt	Alhurra Egypt
na	na	na	na

Arabic

**Credibility**

Percentage of surveyed weekly audience that found broadcasts credible (%)		
	MBN Iraq	MBN Egypt
Radio	75	98
TV	76	93

**Understanding**

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)				
	Sawa Iraq	Alhurra Iraq	Sawa Egypt	Alhurra Egypt
Current Events	93	52	71	75
U.S. Culture	46	29	44	75
U.S. Policies	45	30	45	41

**Quality**

Combined Scores from audience panel		
	MBN Iraq	MBN Egypt
Radio	na	na
TV	na	na

\*USIB audience estimate is based on data from Algeria, Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Morocco, Oman, Palestinian Territories, Saudi Arabia, Syria, Tunisia and the UAE. The USIB estimate for Iraq includes the impact of Radio Free Iraq (RFI) broadcasts. RFI weekly unduplicated reach is 16.1% or approximately 3.0 million adults in Iraq.

Data are from an March 2011 survey of adults (15+) in Iraq and June/July 2011 survey in Egypt.

# Arabic Broadcasting

Total Population of Iraq: 32.7 million

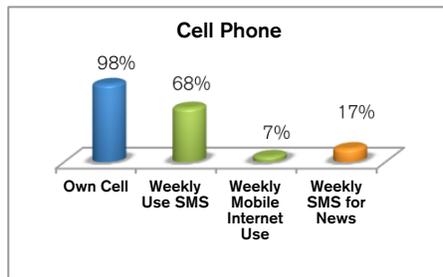
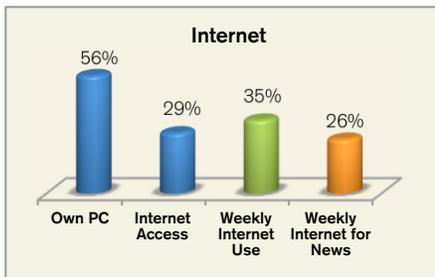
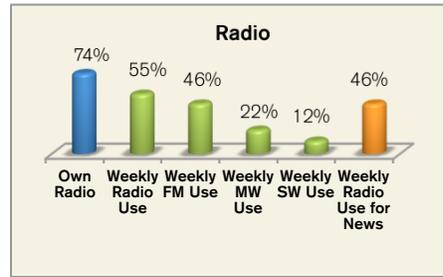
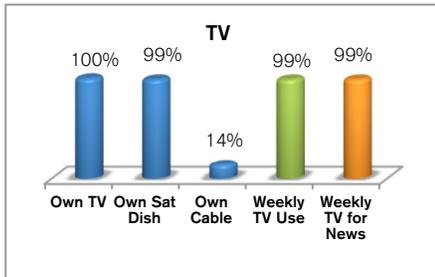
## A U D I E N C E C O M P O S I T I O N

	Sample	Radio Free Iraq Weekly Audience
<b>Sex</b>	%	%
<b>Male</b>	51	53
<b>Female</b>	49	47
<b>Age</b>		
<b>15-24</b>	26	17
<b>25-34</b>	24	27
<b>35-44</b>	22	25
<b>45-54</b>	15	18
<b>55-64</b>	11	12
<b>65+</b>	2	2

	Sample	Radio Free Iraq Weekly Audience
<b>Education</b>	%	%
<b>Illiterate/No Formal</b>	24	26
<b>Elem./Inter.</b>	33	26
<b>Secondary</b>	20	19
<b>Coll./Univ.</b>	24	29
<b>Ethnicity/Nationality</b>		
<b>Arabic</b>	80	93
<b>Kurdish</b>	16	4
<b>Other</b>	4	3

	Sample	Radio Free Iraq Weekly Audience
<b>Residence</b>	%	%
<b>Urban</b>	67	71
<b>Rural</b>	33	29
<b>Language</b>		
<b>Arabic</b>	80	93
<b>Kurdish</b>	17	4
<b>Other</b>	3	3

## M E D I A U S E



### Top Ten Media Outlets

1. Al Arabiya
2. Al Sharqia
3. Al Iraqia
4. MBC 1
5. MBC Action
6. Abu Dhabi Al Oula TV
7. Al Jazeera
8. Al Sumeria
9. Al Baghdadi
10. MBC 4

### Top Ten Sources of News

1. ORT-1
2. Khabar
3. Kazakhstan-1
4. KTK
5. NTV
6. El Arna
7. www.mail.ru
8. Russkoe Radio
9. 31 Kanal
10. Evropa Plus

## 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**
- The drawdown of US forces and the continued weakness of central authority may allow militia and insurgent groups to re-establish themselves in some areas. The government of national unity, which brings together the four largest political groups, has been weak and divided, and some blocs have threatened to pull out to join the parliamentary opposition.
- More than eight years after the US invasion in 2003, Iraq continues to be wracked by intense violence. So far during 2011, around 11 civilians have been killed on average every day, mainly by suicide and other bombings. August, which coincided with Ramadan, was the bloodiest month in a year, with an estimated 395 civilian deaths according to a preliminary figure from Iraq Body Count (IBC).

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 75.36 (152/179)**
- Although Iraq has a thriving media environment with many ethnic and religious groups represented, media freedom and freedom of speech are still an issue of contention. Reporters Without Borders reported in February 2011 that the offices of their partner group in Baghdad— Journalistic Freedoms Observatory (JFO)—was raided by security forces whereby its computers and archives were stolen. The worst of the criticism came after February 25, 2011, known as the “Day of Rage,” when Iraqis took to the street to protest government corruption, faulty infrastructure, unemployment, electricity and water cuts. Reporters without Borders called it the “Black Day” for media freedom in Iraq because Iraqi Security Forces detained 300 leading journalists and intellectuals who took part in covering the protests.
- Reports of government arrests and intimidation of NGO workers in Iraq, and anyone that criticizes the current government are prevalent. In the first four months of 2011, five journalists have been killed in Iraq. In 2010, seven journalists were killed in total. Although actual violence due to war has decreased since the height of the Iraq war, intimidation and threats against journalists and regular citizens have increased, even—according to the New York Times—to the point of death threats by text message, suspected by many as coming from Iraqi authorities. Human Rights Watch also reported widespread crackdowns on protesters in Iraq, including detention and torture.
- Reporters without Borders has been pressing the Iraqi parliament to pass a law protecting journalists amid the many abuses, detentions and assaults committed against journalists and photographers in Iraq trying to cover recent protests, which although significant, have not compared in size to the 2011 Arab Spring protests around the region.

P R O F I L E



**Language of Broadcast:** Arabic

**Coverage:** 28 hrs. of original and 91 hrs. of repeat radio programming per week; Internet

**Distribution:**

**Radio:** 13 FM transmitters, One cross-border MW

**New Media:** Interactive and multimedia website with live streaming and MobileTech supported mobile site. Social Media activities include Facebook page, Twitter feed, and YouTube page

**Staff:** 11

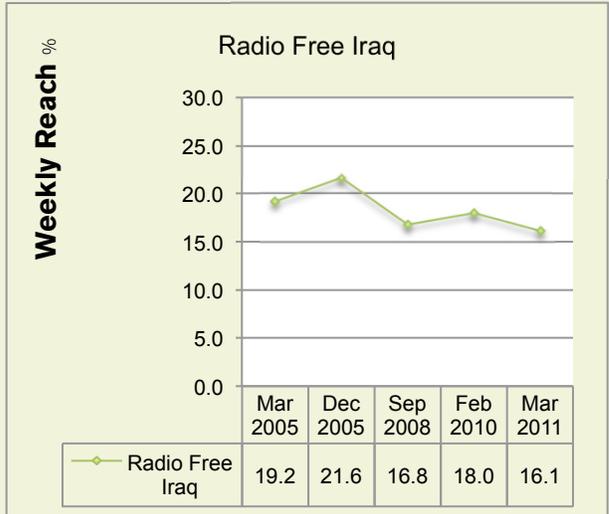
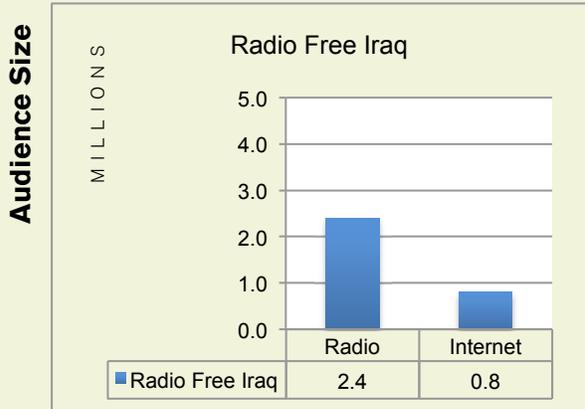
**Budget:** \$2,215,000

**Established:** 1998 to present



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

(Using Data from Iraq, March 2011)



Weekly Reach by Media (%)	
Radio Free Iraq	
Radio	12.9
TV	na
Internet	4.3
<b>Total</b>	<b>16.1</b>

Awareness (%)	
Radio Free Iraq	
	46%

Arabic

Credibility	
Percentage of surveyed weekly audience that finds broadcasts credible (%)	
Radio Free Iraq	
Radio	72
TV	na

Understanding	
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
Radio Free Iraq	
Current Events	75
Current Events in Iraq	94

Quality	
Combined Scores from audience panel	
Radio Free Iraq	
Radio	3.1
TV	na

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

# Arabic Broadcasting

Total Population of Iraq: 32.7 million

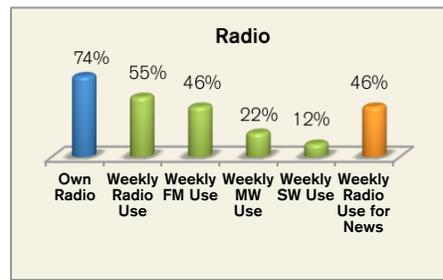
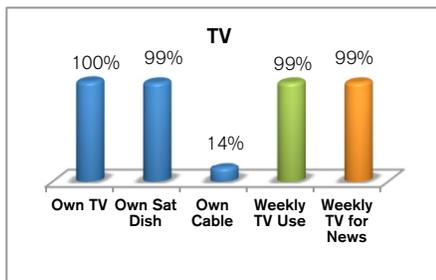
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## M E D I A U S E

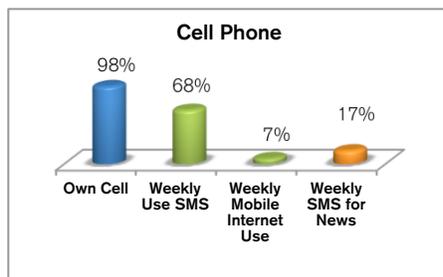
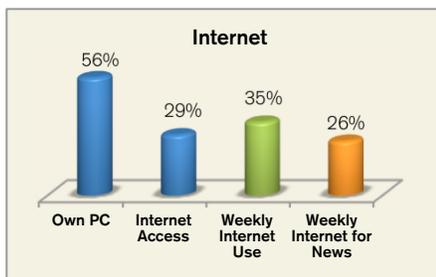


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## C O N T E X T



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

### Audience Size & Weekly Reach

Country	Population	Radio Audience Size	Radio Weekly Reach %	TV Audience Size	TV Weekly Reach %	USIB Internet Audience Size	USIB Internet Weekly Reach %
Algeria	36,000,000	54,748	1.4	410,607	10.5	7,821	0.2
Egypt	82,600,000	2,264,466	4.3	7,741,314	14.7	526,620	1.0
Iraq	32,700,000	5,355,360	28.8	9,018,575	48.5	2,621,895	14.1
Jordan	6,600,000	659,295	16.1	900,900	22.0	57,330	1.4
Kuwait	2,800,000	434,067	33.7	274,351	21.3	54,097	4.2
Lebanon	4,300,000	354,750	11.0	277,350	8.6	16,125	0.5
Morocco	32,300,000	3,327,897	33.5	1,658,982	16.7	99,340	1.0
Oman	3,000,000	31,484	1.7	557,452	30.1	64,820	3.5
Palestinian Territories	4,200,000	154,560	6.9	206,080	9.2	24,640	1.1
Saudi Arabia	27,500,000	345,239	3.3	1,663,426	15.9	52,309	0.5
Syria	22,500,000	1,509,490	11.5	3,228,996	24.6	262,520	2.0
UAE	7,900,000	292,406	37.4	189,204	24.2	21,109	2.7

### Awareness, Credibility & Understanding

Country	Radio Awareness %	Radio Cred. %	Radio Under. Current Events %	Radio Under. U.S. Culture* %	Radio Under. U.S. Policies* %	TV Aware. %	TV Cred. %	TV Under. Current Events %	TV Under. U.S. Culture* %	TV Under. U.S. Policies* %
Algeria	6%		53%	47%	45%	46%		53%	47%	52%
Egypt	na		76%	48%	48%	na		75%	47%	43%
Iraq	na		RFE/RL-76% MBN-93%	RFE/RL-95% MBN-46%	RFE/RL-na MBN-45%	na		89%	44%	41%
Jordan	na		47%	26%	25%	na		47%	29%	27%
Kuwait	80%		89%	59%	58%	75%		86%	68%	70%
Lebanon	na		52%	29%	30%	na		64%	57%	59%
Morocco	na		82%	63%	59%	na		75%	66%	65%
Oman	7%		86%	80%	71%	67%		84%	75%	74%
Palestinian Territories	33%		46%	71%	67%	34%		41%	69%	59%
Saudi Arabia	na		69%	41%	39%	na		72%	57%	52%
Syria	51%		68%	43%	41%	na		54%	43%	44%
UAE	na		76%	55%	50%	na		95%	79%	75%

**Credibility:** Percentage of surveyed weekly audience that found broadcasts credible (%)

**Understanding:** Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%) \* RFE/RL's question was "Understanding of Current Events in Country"

**Culture:** Percentage of surveyed weekly audiences that found broadcasts increased their understanding of U.S Culture (VOA/MBN) or Current Events in Country (RFE/RFA)

**Culture:** Percentage of surveyed weekly audiences that found broadcasts increased their understanding of U.S Policies (VOA/MBN) or International Developments that Affect Country (RFE/RFA)

Data are from Algeria, June 2007; Egypt, June 2010; Iraq, March 2011; Jordan, March 2011; Kuwait, January 2010; Lebanon, March 2011; Morocco, April 2011; Oman, January 2009; Palestinian Territories, March 2010; Saudi Arabia, April 2011; Syria, March 2010; UAE April 2011.

## Audience Size & Weekly Reach (cont.)

Country	Population	USIB Audience Size	USIB Weekly Reach %	BBC Unduplicated Audience Size	BBC Unduplicated Weekly Reach %	Other International Broadcaster Audience Size	Other International Broadcaster Weekly Reach %
Algeria	36,000,000	449,712	11.5			Aljazeera- 2,338,504	59.8
Egypt	82,600,000	9,268,512	17.6	10,058,442	19.1	Aljazeera- 32,492,454	61.7
Iraq	32,700,000	12,328,485	66.3	7,047,505	37.9	Aljazeera- 9,873,945	53.1
Jordan	6,600,000	1,322,685	32.3	1,011,465	24.7	Aljazeera- 3,576,816	84.2
Kuwait	2,800,000	575,750	44.7	503,621	39.1	Aljazeera- 842,373	65.4
Lebanon	4,300,000	574,050	17.8	316,050	9.8	Aljazeera- 1,327,560	46.0
Morocco	32,300,000	4,182,223	42.1	2,205,353	22.2	Aljazeera- 8,632,664	86.9
Oman	3,000,000	609,308	32.9	287,060	15.5	Aljazeera- 1,227,876	66.3
Palestinian Territories	4,200,000	224,000	10.0	241,920	10.8	Aljazeera- 1,552,320	69.3
Saudi Arabia	27,500,000	1,893,585	18.1	2,772,376	26.5	Aljazeera- 6,193,384	59.2
Syria	22,500,000	4,279,076	32.6	3,425,886	26.1	Aljazeera- 10,172,650	77.5
UAE	7,900,000	377,625	48.3	312,733	40.0	Aljazeera- 522,500	85.9

## Media Use

Country	Own TV	Own Sat. Dish	Own Cable Access	Weekly TV Use	Weekly TV For News	Own Radio	Weekly Radio Use	Weekly FM Use	Weekly MW Use	Weekly SW Use	Radio Use for News
Algeria	98%	88%	35%	95%	93%		57%	51%	7%	2%	
Egypt	99%	82%	23%	99%	97%	59%	39%	25%	21%	3%	24%
Iraq	100%	99%	14%	99%	99%	74%	55%	46%	22%	12%	44%
Jordan	100%	99%	2%	99%	98%	43%	61%	59%	4%	1%	48%
Kuwait	100%	99%	40%	91%	89%	72%	62%	56%	34%	20%	60%
Lebanon	100%	44%	67%	99%	97%	88%	63%	63%	5%	1%	42%
Morocco	100%	95%	7%	100%	100%	88%	71%	74%	20%	6%	67%
Oman	100%	99%	5%	98%	80%		74%	66%	40%	20%	
Palestinian Terr.	98%	93%	25%	89%	86%	59%	47%	40%	9%	2%	38%
Saudi Arabia	100%	98%	12%	99%	97%	67%	72%	67%	24%	10%	61%
Syria	100%	98%	18%	99%	83%	72%	58%	41%	10%	5%	
UAE	100%	100%	40%	100%	98%	70%	78%	77%	28%	17%	68%

Country	Own PC	Own Int. Acc.	Weekly Internet Use	Weekly Internet For News	Own Cell Phone	Weekly Use SMS	Weekly SMS For News
Algeria	45%	31%	24%	22%	82%	na	
Egypt	46%	27%	23%	20%	94%	44%	5%
Iraq	56%	29%	35%	26%	98%	68%	7%
Jordan	61%	32%	36%	30%	97%	77%	8%
Kuwait	87%	82%	77%	71%	99%	99%	
Lebanon	72%	58%	49%	27%	94%	82%	8%
Morocco	48%	47%	39%	32%	99%	79%	3%
Oman	52%	35%	32%	16%	97%	94%	
Palestinian Terr.	50%	39%	32%	30%	88%	55%	8%
Saudi Arabia	80%	73%	59%	42%	99%	87%	15%
Syria	60%	44%	28%	19%	86%	63%	
UAE	93%	91%	68%	49%	100%	90%	20%

P R O F I L E



**Language of Broadcast:** Armenian

**Content:** 1 hr. of original and 1 hr. of repeat TV programming per week; Internet

**Distribution:** 1 affiliate (1 TV)

**TV:** VOA Armenian broadcasts through its affiliate, Armenia TV, one of the most watched stations in Armenia. Service airs two programs: *Armenian Daily TV* and *Armenian Magazine TV*.

**Web:** The Service has web and mobile sites, is available on Facebook, Twitter, YouTube, and sends a daily e-mail newsletter. The website also hosts video streams.

**Staff:** 2

**Budget:** \$386,200

**Established:** 1951 to present; TV programming established in 2004



**Language of Broadcast:** Armenian

**Content:** 25 hrs. of original and 14 hrs. of repeat radio programming per week; 2.5 hours of TV programming; Internet

**Distribution: Radio:** RFE/RL has 4 FM partners: 2 National and 1 Yerevan affiliate covering the whole country in addition to HotBird.

**New Media:** The Service has a multimedia-rich Web site (Armenian-language site with Russian and English sub sites) with streaming audio and video as well as mobile sites and is active on Facebook, Twitter, and YouTube.

**Video:** Weekly: *Crossroad Of Opinions* is carried by 7 local TV stations; *Writer And Reality* (20 min) is carried by 5 local TV stations. The service also produces a daily *Video News Of The Day* (12-15 min) which is carried by 5 local TV stations.

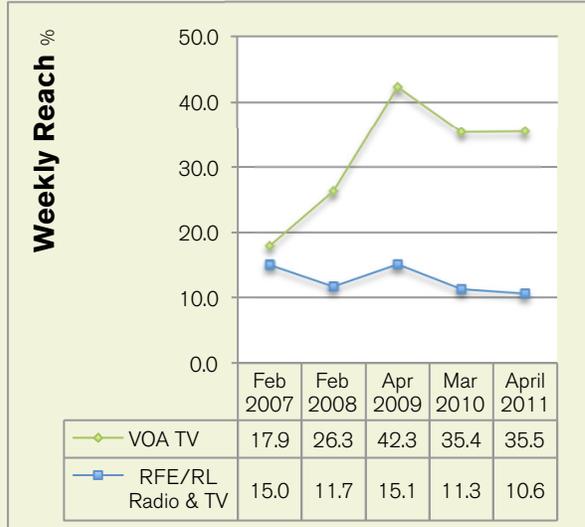
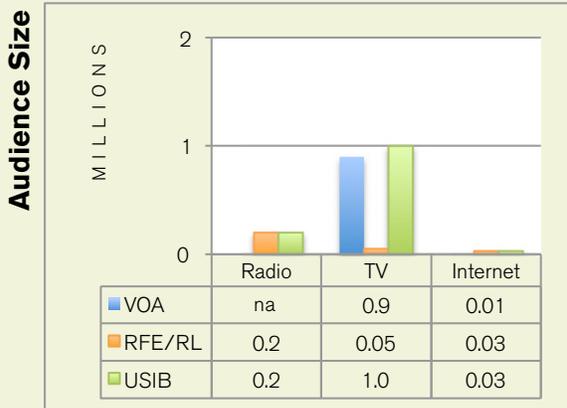


**Staff:** 6

**Budget:** \$1,499,000

**Established:** 1953 to present

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



Weekly Reach by Media (%)			
	VOA	RFE/RL	USIB
Radio	na	9.1	9.1
TV	35.4	1.4	35.8
Internet	0.2	0.9	1.0
<b>Total</b>	<b>35.5</b>	<b>10.6</b>	<b>41.2</b>

Awareness (%)*	
VOA	RFE/RL
48	64

Armenian

Credibility	Percentage of surveyed weekly audience that finds broadcasts credible (%)	
	VOA	RFE/RL
Radio	na	63
TV	89	85

Understanding	Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
	VOA TV	RFE/RL Radio**
Current Events	73	76
U.S. Society (VOA) or Current Events in Armenia (RFE/RL)	58	76
U.S. Policies	63	na

Quality	Combined Scores from audience panel	
	VOA	RFE/RL
Radio	3.2	3.6
TV	3.5	na

\* Awareness measured in the context of questions on radio stations.

\*\*Understanding ratings for RFE/RL TV are 67% for Current Events and 69% for Current Events in Armenia.

Data are from an April 2011 survey of adults (15+) in Armenia.

# Armenian Broadcasting

Total Population of Armenia: 3.1 million

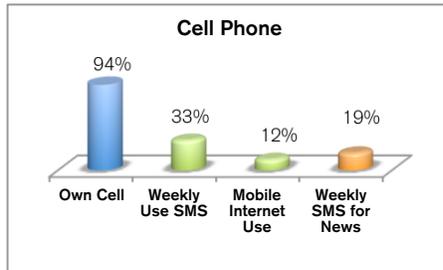
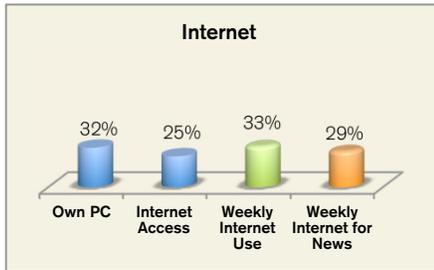
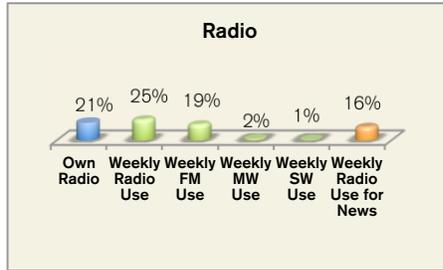
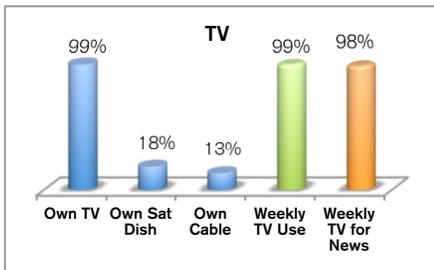
## A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
<b>Sex</b>	%	%	%
<b>Male</b>	45	42	55
<b>Female</b>	55	58	46
<b>Age</b>			
<b>15-24</b>	20	20	16
<b>25-34</b>	27	27	23
<b>35-44</b>	16	18	21
<b>45-54</b>	12	13	18
<b>55-64</b>	11	13	12
<b>65+</b>	14	9	10

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
<b>Education</b>	%	%	%
<b>None</b>	20	14	8
<b>Primary</b>	31	30	27
<b>Secondary</b>	21	25	25
<b>Technical</b>	26	30	40
<b>Coll./Univ.</b>	20	14	7
<b>Ethnicity/Nationality</b>			
<b>Armenian</b>	98	99	99
<b>Russian</b>	<1	0	0
<b>Other</b>	2	1	1

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
<b>Residence</b>	%	%	%
<b>Urban</b>	67	72	76
<b>Rural</b>	33	28	24
<b>Language</b>			
<b>Armenian</b>	99	100	99
<b>Russian</b>	1	0	1

## M E D I A U S E



### Top Ten Media Outlets

1. Armenian TV 1H1
2. Armenia
3. Armenian TV 2H2
4. Shant
5. Google
6. RTR Planeta
7. ORT
8. TV5
9. ALM
10. Armenakob

### Top Ten Sources of News

1. Shant
2. Electronika.ru
3. Armenian Public TV 1
4. Armenian TV
5. RTR Planeta
6. Armenian TV H2
7. Google
8. Azatutyun (RL)
9. Erkir Media
10. ORT

### Web Analytics

<b>VOA Weekly Visitors</b>	1,800
<b>Weekly Visits</b>	2,900
<b>RFE/RL Weekly Visitors</b>	16,000
<b>Weekly Visits</b>	68,700

## C O N T E X T



**Stability**



**Political Freedom**



**Press Freedom**



**Ease of Distribution**



**Competition**

### Political Situation

- **Freedom House Political Freedom Index (2011): PARTLY FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- Although, freer than other FSU countries, only limited political and civil freedoms are supported in Armenia. International observers noted widespread fraud during the 2008 elections; bribes defined the candidates' success. Rallies opposing the current government were allowed to be organized in 2011.
- Government corruption persists. Police crimes perpetrated during the events of March 2008 remain unpunished and many jailed journalists are still behind bars. While academic and religious freedoms are respected, the government severely restricts freedom of assembly.
- Armenia's legal framework is generally supportive of the freedom of speech. However, low awareness of laws surrounding this freedom furthers self-censorship among journalists.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 27.00 (77/179)**
- When commenting on the most recent developments in the Armenian media market, experts appeared very enthusiastic about the "solid improvement...in freedom of speech, primarily as a result of decriminalization of libel and defamation laws and the government finally moving forward with awarding broadcast licenses." (Media Sustainability Index 2011, IREX, p. 131.) The completion of Armenia's digitalization process is still slated for 2015. However, in December 2010 "the National Commission on Television and Radio announced the results of frequency license tenders for digital broadcasting" and, thus, addressed the concern of domestic and international observers that the government was creating artificial barriers to the digital switchover.
- Despite the positive changes, journalists' professional standards and ethics remain a concern for media experts as well as for news consumers. Both experts and consumers are particularly uneasy about the increasing confrontation between pro-government and pro-opposition media outlets. In qualitative studies, participants complained that state-run and oppositional outlets are biased when it comes to reporting on current events in Armenia: both sides tend to underreport and misrepresent information to their advantage.

P R O F I L E



**Language of Broadcast:** Azerbaijani

**Content:** 3.5 hours of original audio programming per week for Internet; 1 hr. of original and 2.49 hrs. of repeat video programming per week; Internet

**Distribution:** Satellite

**Radio:** The 15 minute VOA Azerbaijani audio show is available on Turksat and Internet.

**TV:** VOA Azerbaijani airs programs *Azerbaijani Daily* and *Review of the Week* via Eutelsat Hotbird in addition to Internet.

**Web:** The Service has web and mobile sites, a Facebook fan page, Twitter, YouTube accounts, and sends an email newsletter. VOA Azeri produces 3 web-only audio products (including a 15 minute Internet audio also broadcast on Turksat) and 2 web-only video products (including a daily video newscast on Hotbird & Eutelsat), and maintains 5 blogs. The website also hosts video streams and a biweekly live forum. The Service maintains boards on the Pinterest site.

**Staff:** 4 | **Budget:** \$741,000

**Established:** 1951 to 1953; 1982 to present



**Language of Broadcast:** Azerbaijani

**Content:** 27 hrs. of original and 39 hrs. of repeat radio programming per week; Internet; weekly newspaper

**Distribution:**

**Radio:** RFE/RL's delivery includes multiple SW frequencies, TurkSat, HotBird, AsiaSat -- (4 hours of live programing daily and 5 hours of repeats daily). Alternative delivery includes weekly publication of newspapers with web content.

**New Media:** The Service has a multimedia, bi-lingual Web site (Azeri and Russian language sites). The Service is also active on Facebook and Twitter in Azeri and Russian languages and has a branded YouTube page in Azeri.

**Staff:** 6

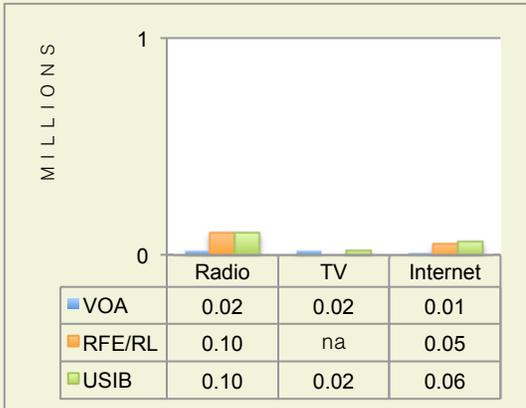
**Budget:** \$1,654,000

**Established:** 1953 to present



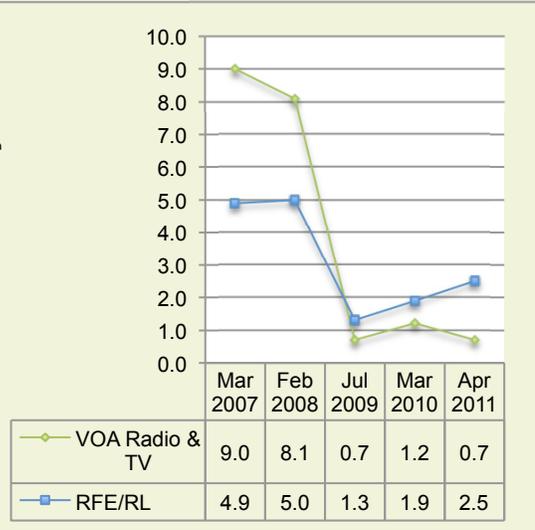
P E R F O R M A N C E D A T A (Using Data from Azerbaijan, April 2011)

**Audience Size**



Weekly Reach by Media (%)			
	VOA	RFE/RL	USIB
Radio	0.4	1.9	2.10
TV	0.4	na	0.40
Internet	0.1	0.9	1.0
Total	0.7	2.5	2.9

**Weekly Reach %**



Awareness (%)	
VOA	RFE/RL
36	52

Azerbaijani

**Credibility**

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

**Understanding**

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

**Quality**

Combined Scores from audience panel		
	VOA	RFE/RL
Radio	3.4	3.3
TV	3.4	na

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

Data are from an April 2011 survey of adults (15+) in Azerbaijan.

# Azerbaijani Broadcasting

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

Total Population of Azerbaijan: 9.2 million

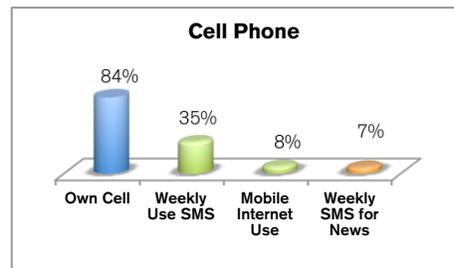
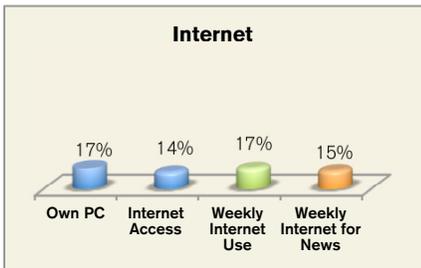
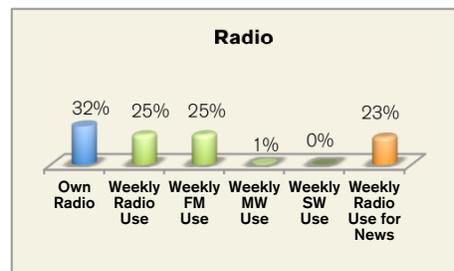
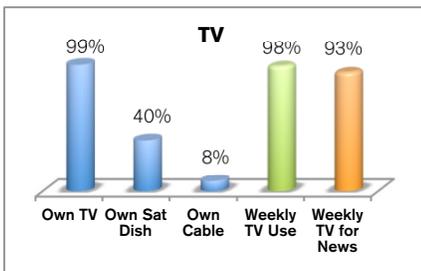
	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
<b>Sex</b>	%	%	%
Male	48	na	na
Female	52	na	na
<b>Age</b>			
15-24	28	na	na
25-34	15	na	na
35-44	13	na	na
45-54	14	na	na
55-64	15	na	na
65+	16	na	na

	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
<b>Education</b>	%	%	%
None/Primary	18	na	na
Secondary	60	na	na
Technical	8	na	na
Coll./Univ.	14	na	na
<b>Ethnicity/Nationality</b>			
Azerbaijani	95	na	na
Russian	1	na	na
Other	4	na	na

	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
<b>Residence</b>	%	%	%
Urban	56	na	na
Rural	44	na	na
<b>Language</b>			
Azerbaijani	94	na	na
Russian	2	na	na
Other	4	na	na

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

## M E D I A U S E



### Top Ten Media Outlets

1. ANS TV
2. ATV
3. Azerbaijan Public TV
4. Khazar
5. AzTV
6. Space
7. Lider
8. STV (Turkey)
9. Radio ANS
10. ORT-1 Evraziya

### Top Ten Sources of News

1. ANS TV
2. Khazar
3. ATV
4. Azerbaokam Public TV
5. AZTV
6. Linder TV
7. ANS 102 FM
8. Google
9. day.az
10. ORT

### Web Analytics

<b>VOA Weekly Visitors</b>	3,000
<b>Weekly Visits</b>	5,100
<b>RFE/RL Weekly Visitors</b>	35,700
<b>Weekly Visits</b>	123,000

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK**
- Azerbaijan held parliamentary elections on November 7, 2010. Conditions necessary for fair and transparent elections were missing. A deficient candidate registration process, limited freedoms of peacefully assembly, unbalanced media coverage, lack of effective campaign resources all created an uneven playing field in favor of the candidate from the ruling party. Overall, these elections were not sufficient for meaningful democratic development in the country.
- Azerbaijan is an authoritarian petro-state, in which all power is held by president Ilham Aliyev, oil revenues dominate the government budget, and the government dominates the economy.
- A March 2009 referendum, which eliminated presidential terms limits, has further consolidated the effective dictatorship of Mr. Aliyev.
- Opposition parties exist and have token representation in the Azeri parliament, but enjoy no real influence or hope of gaining power through ordinary political processes.
- Public opinion is dominated by resentment over the continuing Armenian occupation of Nagorno-Karabakh and surrounding provinces.
- Azerbaijan is highly corrupt even by the standards of the former Soviet Union. Oil revenues have fueled a building boom in Baku, but have not dispelled the problem of persistent unemployment in the regions.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 87.25 (162/179)**
- Although the government exerts a high degree of control over the media in Azerbaijan, newspapers, the Internet, and satellite TV give Azeris access to some independent sources of information.
- Despite Azerbaijan's record of jailing opposition journalists on trumped-up charges, there continue to be opposition journalists to arrest. While the government dominates Azerbaijani TV and radio, some of the country's leading newspapers favor the opposition.
- On March 7, 2011, RFE/RL journalist Khadija Ismailova received a letter from authorities threatening to 'defame' her if she didn't 'behave.' The smear campaign against her is a reminder of the dire state of freedom of expression in Azerbaijan. Ismailova is renowned for her investigative reporting, uncovering several cases of elite corruption in Azerbaijan – including against members of President Ilham Aliyev's family.
- Since January 2009, international broadcasters, including RFE/RL, are no longer able to use national frequencies. RFE/RL has responded by aggressively working to attract new audiences to the TurkSat audio stream that launched in April 2009 and the service has dedicated additional resources to its website.
- Newspapers and the Internet, the freest media in Azerbaijan, reach only a small minority of the population, and radio is in decline as well.
- By far the most important medium of communication in Azerbaijan is TV, to which virtually all Azerbaijanis have access. On average, Azeris spend 5.5 hours per day watching TV.

P R O F I L E



**Language of Broadcast:** Bangla

**Content:** 3.5 hrs. of original radio programming per week; 3.5 hrs. of repeat radio programming per week; 0.25 hrs. of original TV programming per week; Internet

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

**Radio:** The Service's FM affiliate is Radio Today, the top-rated private FM station in the capital, Dhaka. The Service broadcasts two five-minute Bangla newscasts daily.

**TV:** Bangla's 10 to 12 minute TV program, *Hello America*, is broadcast every Friday on NTV, the 5th most watched TV channel in Bangladesh, and repeated on Saturday. In March 2012, the Bangla Service reached agreement with DESH TV to broadcast the *USA VOTES 2012* version of VOA 60 once per week on the Dhaka outlet. VOA 60 is a 60-second audio/video element.

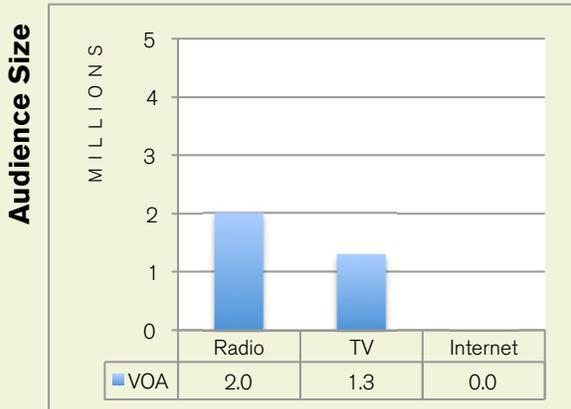
**Staff:** 7

**Budget:** \$1,324,000

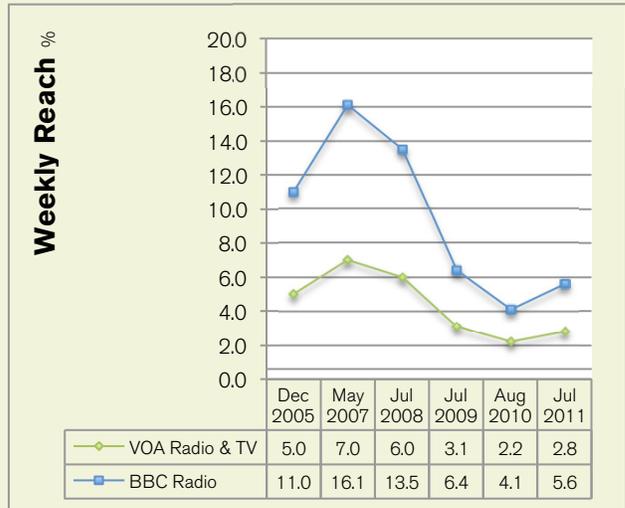
**Established:** 1958 to present



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



Weekly Reach (%) By Media	
VOA	
Radio	1.8
TV	1.2
Internet	0.0
<b>Total</b>	<b>2.8</b>



Awareness (%)	
VOA	
<b>Total</b>	<b>31</b>

Bangla

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

Understanding		
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	VOA Radio	VOA TV
Current Events	90	na
U.S. Culture	31	na
U.S. Policies	25	na

Quality	
Combined Scores from audience panel	
VOA	
Radio	3.3
TV	3.3

\* Understanding ratings for VOA TV are 89% for Current Events, 22% for U.S. Culture and 50% for U.S. Policies.

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

# Bangla Broadcasting

Total Population of Bangladesh: 150.7 million

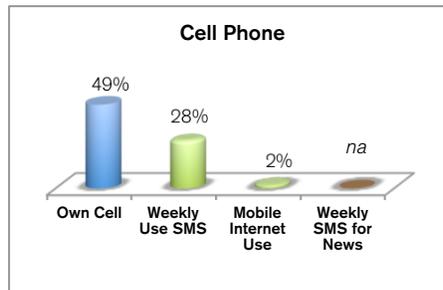
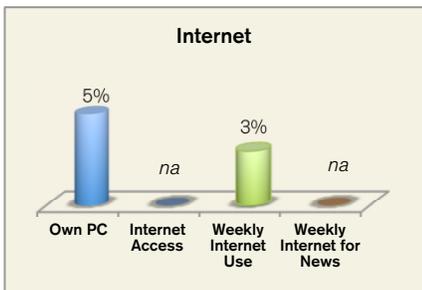
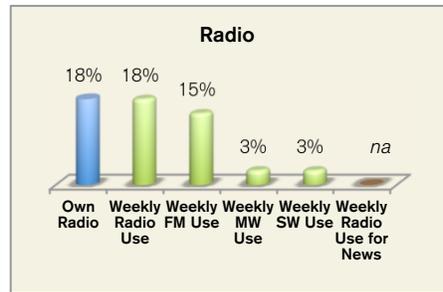
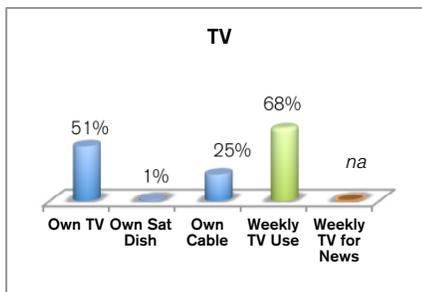
## A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Audience
<b>Sex</b>	%	%
<b>Male</b>	51	74
<b>Female</b>	49	26
<b>Age</b>		
<b>15-24</b>	26	41
<b>25-34</b>	31	22
<b>35-44</b>	20	21
<b>45-54</b>	11	9
<b>55-64</b>	8	6
<b>65+</b>	5	1

	Sample	VOA Weekly Audience
<b>Education</b>	%	%
<b>No Formal</b>	43	24
<b>Primary</b>	22	11
<b>Secondary</b>	19	26
<b>SSC/HSC</b>	11	20
<b>Higher</b>	5	20
<b>Ethnicity/Nationality</b>		
<b>Bangladeshi</b>	99	97
<b>Other</b>	1	3

	Sample	VOA Weekly Audience
<b>Residence</b>	%	%
<b>Urban</b>	24	43
<b>Rural</b>	76	57
<b>Language</b>		
<b>Bangla</b>	100	100

## M E D I A U S E



### Top Ten Media Outlets

1. Bangladesh TV
2. ATN Bangla
3. Ekushey TV
4. Channel I
5. NTV
6. Baishakhi TV
7. ATN News
8. Desh TV
9. RTV
10. ETV

### Top Ten Sources of News

1. Bangladesh TV
2. ATN Bangla
3. Channel I
4. Ekushey TV
5. ATN News
6. Bangladesh Betar
7. NTV
8. Diganta
9. BBC
10. Baishakhi TV

### Web Analytics

**Weekly Visitors** 2,000  
**Weekly Visits** 3,200

## 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 ruling Awami League is expected to serve a full five-year term, having secured a large majority at the 2008 general election. The main opposition Bangladesh Nationalist Party has just 31 of the 300 seats in parliament.
- The government faces no immediate challenge to its rule, but there are two potential sources of political instability: a rise in social unrest, and a new campaign of violence by militant groups.
- Bangladesh's political scene has been dominated recently by preparations for the visit of the Indian prime minister, Manmohan Singh. The visit was the first by an Indian prime minister in 12 years and the first by a statesman from that country's ruling Indian National Congress in nearly four decades. The two sides marked the occasion by signing several trade and co-operation deals. However, measured against the high expectations that the historic occasion evoked in Bangladesh, the visit was a disappointment. The two countries failed to sign agreements on the transit of Indian goods through Bangladesh or resolve a long-standing disagreement over water-sharing.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 57.00 (129/179)**
- Bangladesh has a free and outspoken press, although journalists are frequently subject to violence and intimidation by both government and other activists.
- Bangladesh has just one state run TV channel, BTV. Large portions of the population now have access to cable channels that provide reliable news along with Indian channels for entertainment. The most popular cable channels draw up to a third of the population weekly, providing access to non-state news sources.
- Within the past 3 years a number of private FM radio channels have been licensed and are able to broadcast news. However these are limited to the largest cities only; elsewhere only state run Betar is available.
- Internet is still limited to an urban elite but mobile phone ownership is widespread even in rural areas.

P R O F I L E



**Language of Broadcast:** Belarusian

**Content:** 21 hrs. of original and 35 hrs. of repeat radio programming per week; 0.5 hrs. of original and 0.5 hrs. of repeat TV programming per week; Internet

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

RFE/RL's delivery includes 1 cross border MW affiliate from Lithuania, multiple SW frequencies, HotBird, Internet with streaming audio plus 30 minutes weekly TV on Warsaw-based BelSat's Astra and Sirius satellite (suspended as of December 2010 for financial reasons)

**New Media:** Active on 6 social networking sites including Facebook, VKontakte and Live Journal; active UGC via Pangea website; placement of content and videos on independent local partner sites in Belarus; branded YouTube channel; and mobile site.

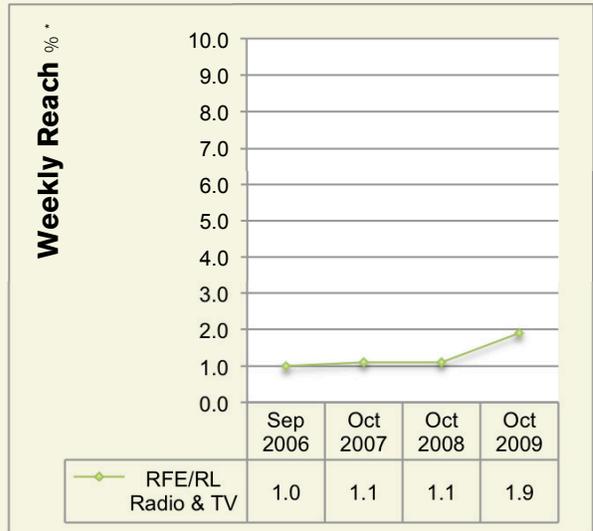
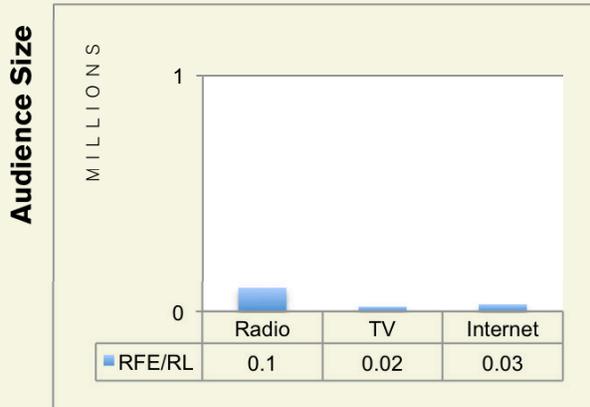
**Staff:** 12

**Budget:** \$2,379,000

**Established:** 1954 to present



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



Weekly Reach (%) by Media	
	RFE/RL
Radio	1.7
TV	0.3
Internet	0.4
<b>Total</b>	<b>1.9</b>

Awareness (%)	
	RFE/RL
<b>Total</b>	<b>29</b>

Belarusian

**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 Belarus	na
U.S. Policies	na

**Quality**

Combined Scores from audience panel	
	RFE/RL
Radio	3.3
TV	na

\* Weekly reach figures include TV beginning in October 2008.  
 \*\* Sample of weekly RFE/RL audience is too small for meaningful analysis.

Data are from an October 2009 nationwide survey of adults (15+) in Belarus.

# 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

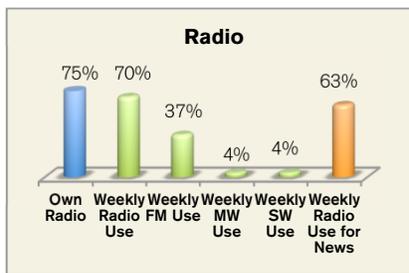
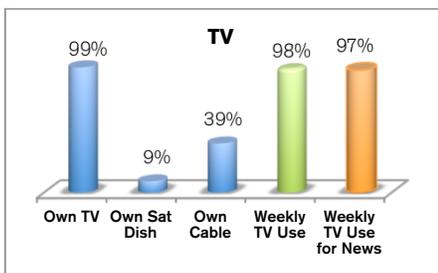
	Sample	RFE/RL Weekly Audience**
<b>Sex</b>	%	%
<b>Male</b>	46	na
<b>Female</b>	54	na
<b>Age</b>		
<b>15-24</b>	18	na
<b>25-34</b>	17	na
<b>35-44</b>	17	na
<b>45-54</b>	19	na
<b>55-64</b>	12	na
<b>65+</b>	17	na

	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

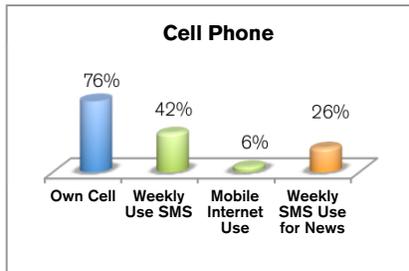
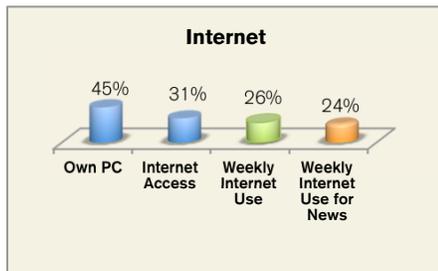


### Top Ten Media Outlets

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

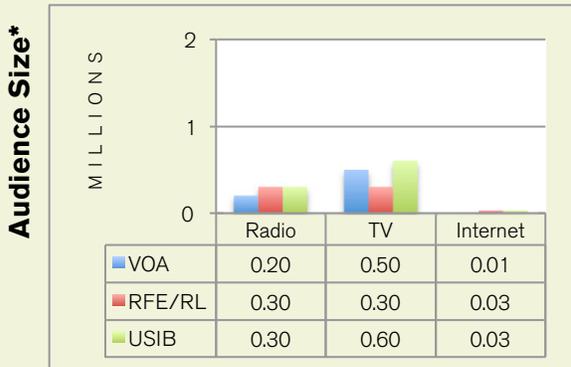
**Distribution:** 193 affiliates (150 FM, 43 TV) RFE/RL's delivery includes affiliates in Bosnia and Herzegovina (49 FM, 29 TV), Kosovo (37 FM), Macedonia (5 FM, 13 TV), Montenegro (12 FM), and Serbia (47 FM, 1 TV), in addition to HotBird and Internet with streaming audio.

**Web:** All of the Balkan Services are active on Facebook and Twitter, have mobile sites, and have launched branded YouTube pages in process.

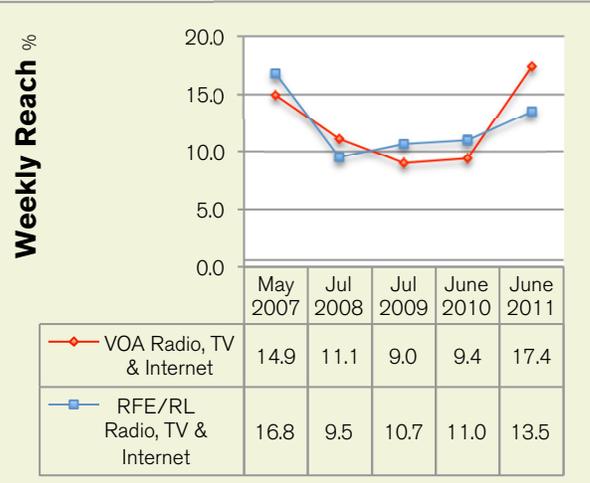


† Numbers reflect RFE/RL Balkans service totals which include Albanian, Bosnian, Macedonian, Montenegrin and Serbian.

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
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

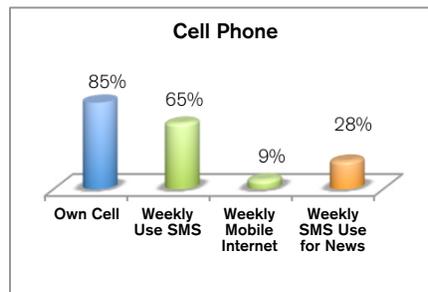
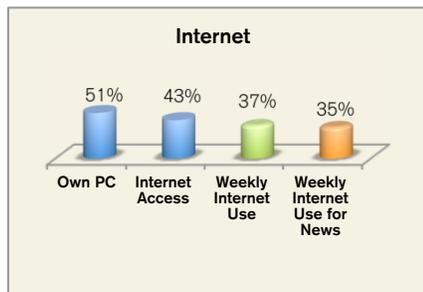
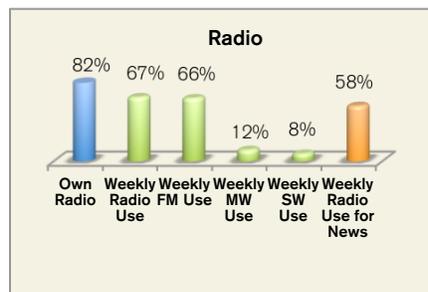
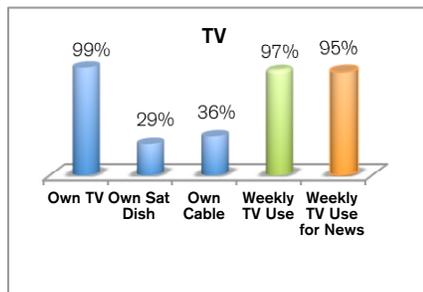
Total Population of Bosnia-Herzegovina: 3.8 million

	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:**

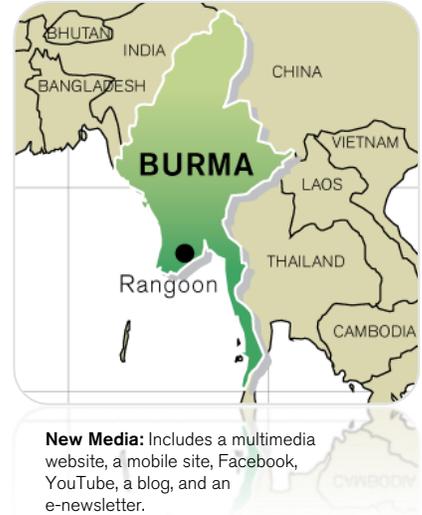
Burmese, Chin, Kachin, Karen, Karenni, Mon, Rakine, Shan

**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 guerilla 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

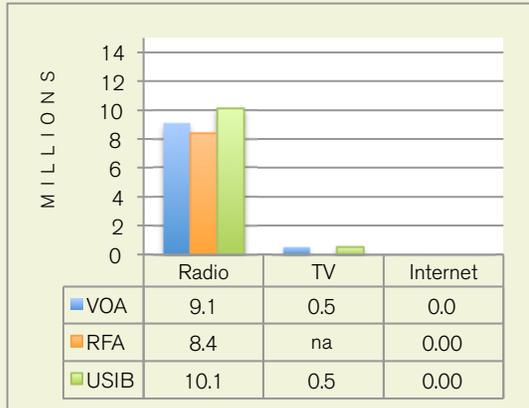
**Budget:** \$2,208,000

**Established:** 1997 to present

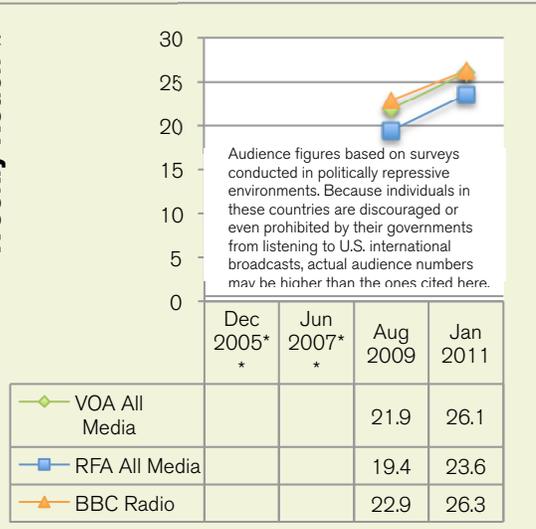
P E R F O R M A N C E D A T A

(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

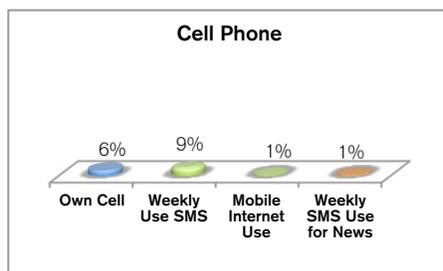
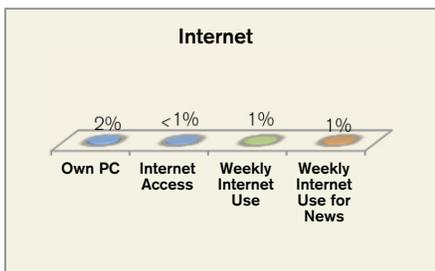
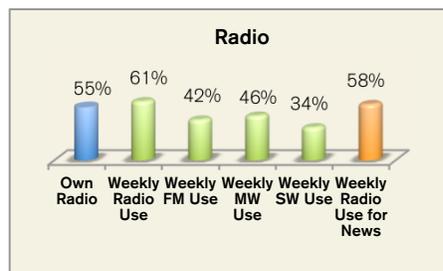
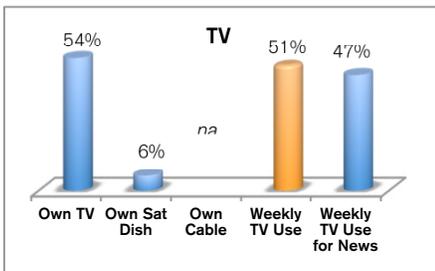
## A U D I E N C E C O M P O S I T I O N

	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

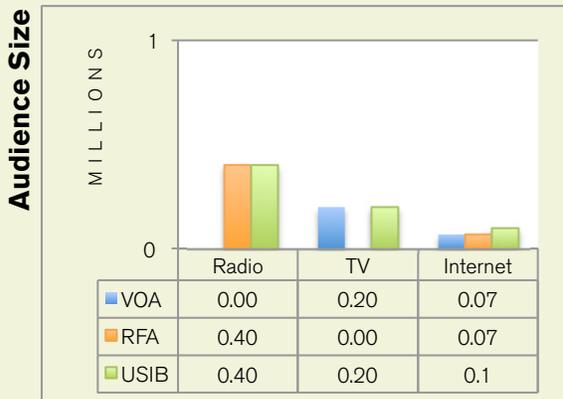


**Language of Broadcast:** Cantonese  
**Content:** RFA broadcasts 7 hrs. of original and 7 hrs. of repeat radio programming per week; Internet  
**Distribution:** 1-3 IBB SW frequencies; Satellite rebroadcasting  
**Radio:** The Service broadcasts 1 hour of original program and 1 hour of repeat daily.  
**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.

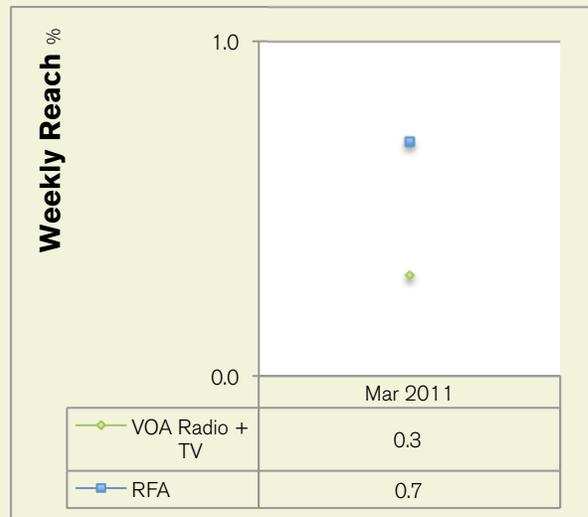


**Staff:** 6  
**Budget:** \$963,000  
**Established:** 1998 to present

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 Broadcasting

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

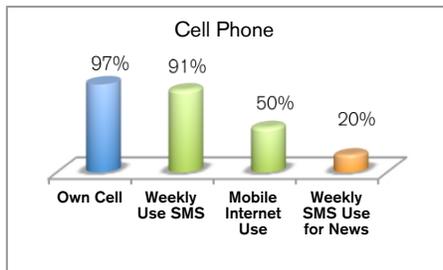
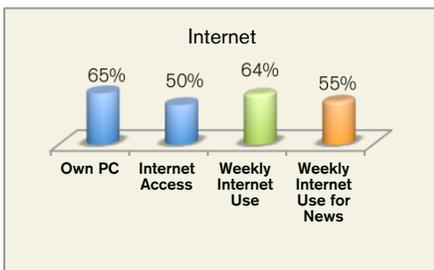
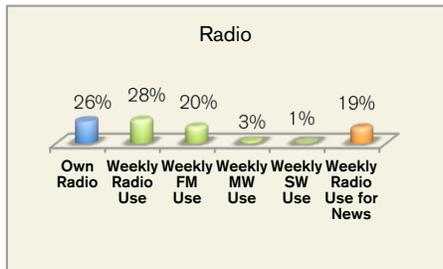
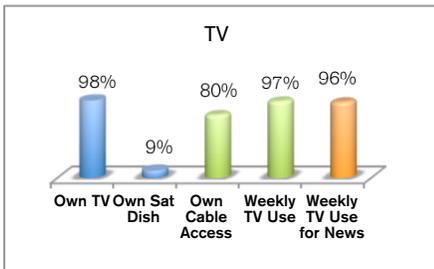
Total Population of Guangdong: 104 million

	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.

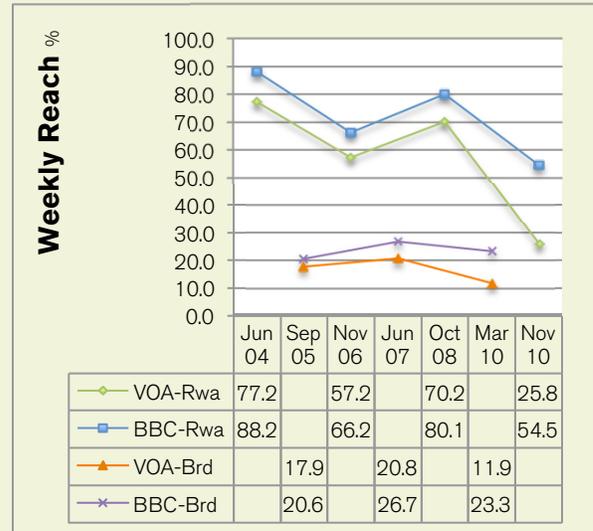
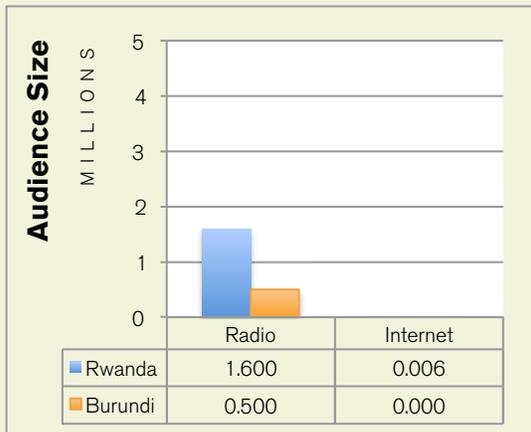
P R O F I L E



**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

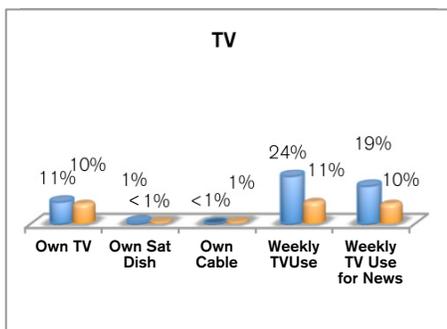
	Rwd. Sam.	Rwd. Wkly. Aud.	Bur. Sam.	Bur. Wkly. Aud.
<b>Sex</b>	%	%	%	%
Male	48	67	49	73
Female	52	33	51	27
<b>Age</b>				
15-24	26	26	30	17
25-34	30	34	28	33
35-44	17	18	20	34
45-54	12	11	12	12
55-64	8	7	6	4
65+	7	3	5	1

	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

## M E D I A U S E

■ Rwanda ■ Burundi

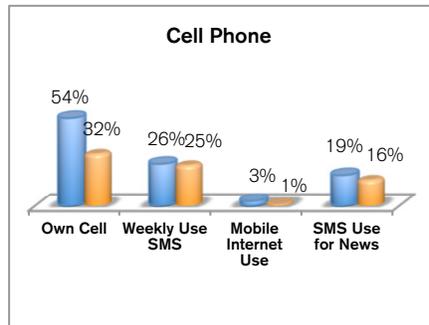
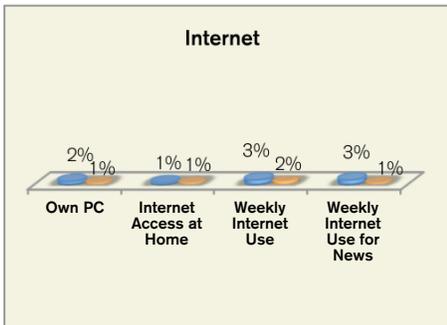


### Top Ten Sources of News (Rwanda)

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.

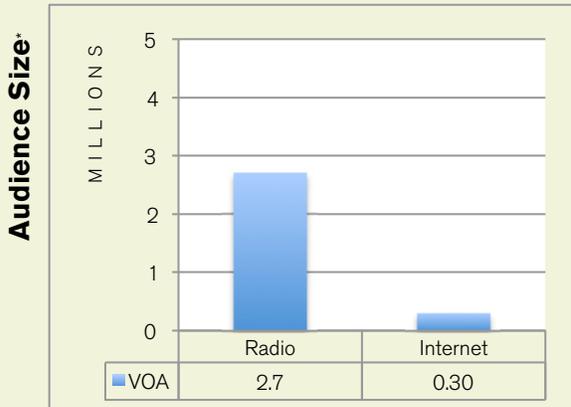
**Staff:** 8

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

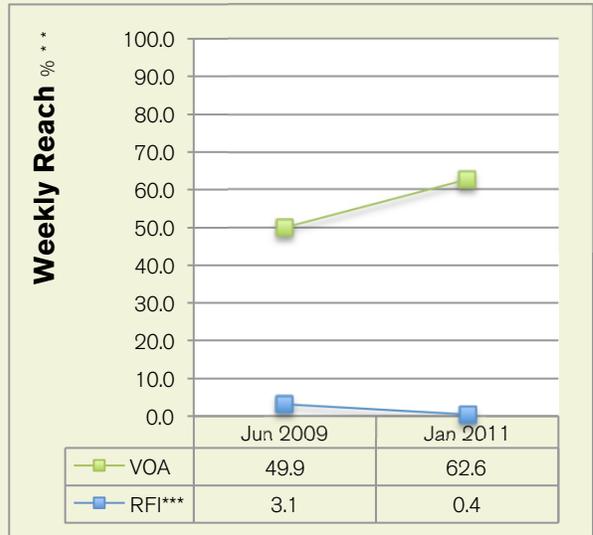
**Established:** 1987 to present



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

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

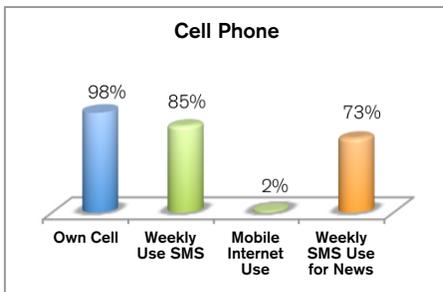
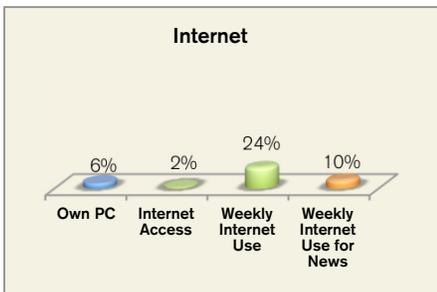
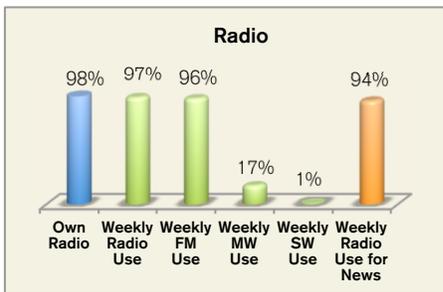
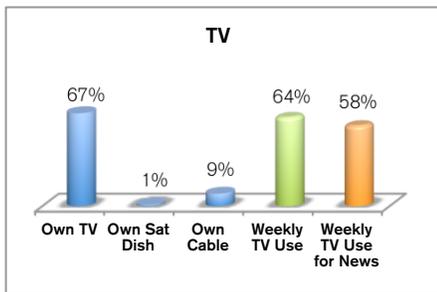
## A U D I E N C E C O M P O S I T I O N

	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+

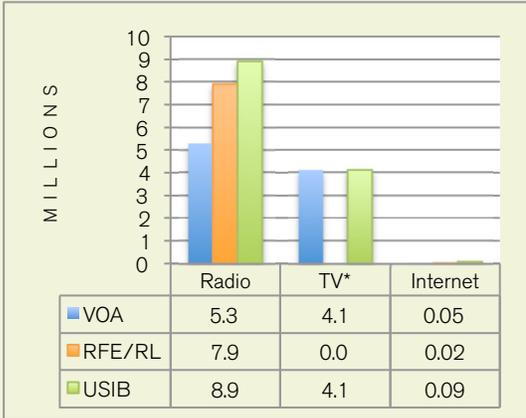
**Established:** 1985-1993; 2002 to present

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



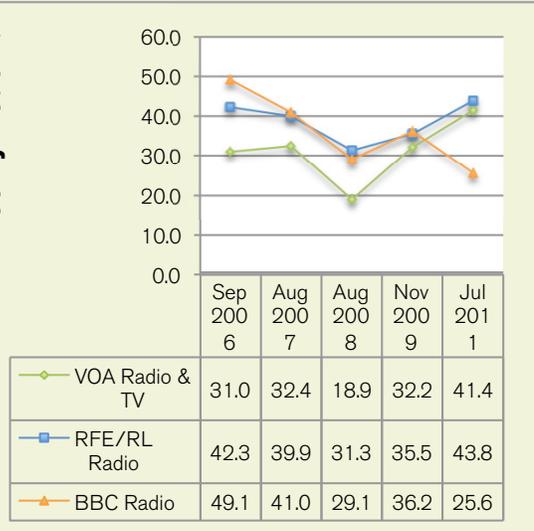
P E R F O R M A N C E D A T A (Using Data from Afghanistan, July 2011)

**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
<b>Total</b>	<b>41.4</b>	<b>43.8</b>	<b>56.4</b>

**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

Dari

\*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.

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

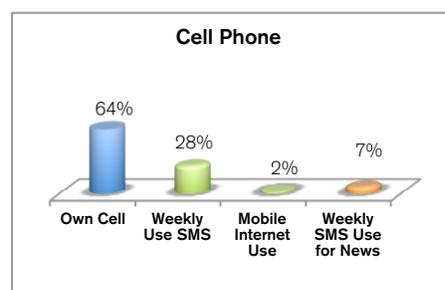
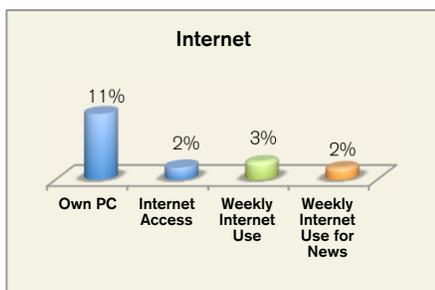
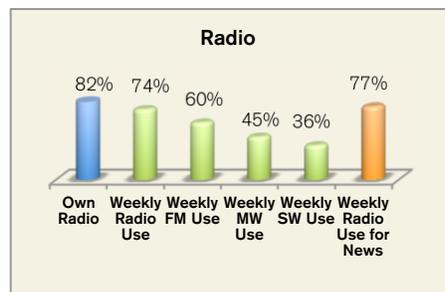
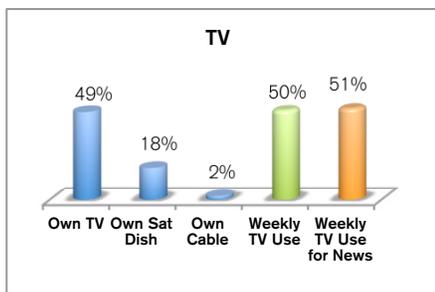
Total Population of Afghanistan: 32.4 million

	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.

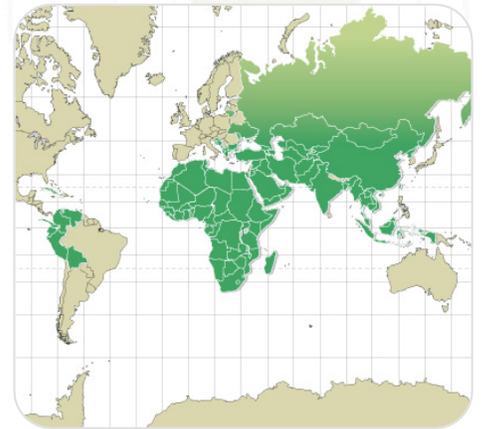
**Partners:** Companies in many countries use Special English materials to produce and sell as their own English-teaching products.

**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

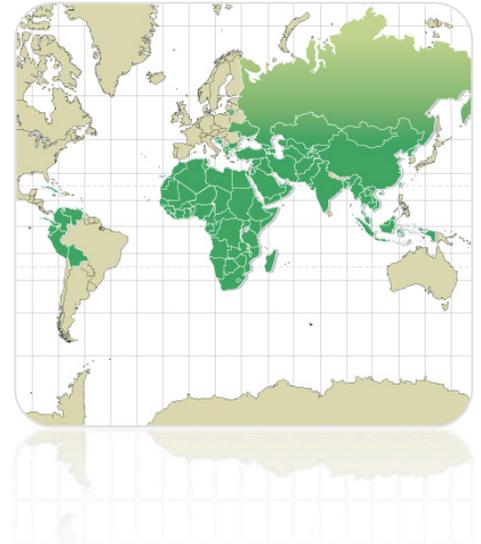
**Distribution:** Affiliates, satellite, and IBB SW

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

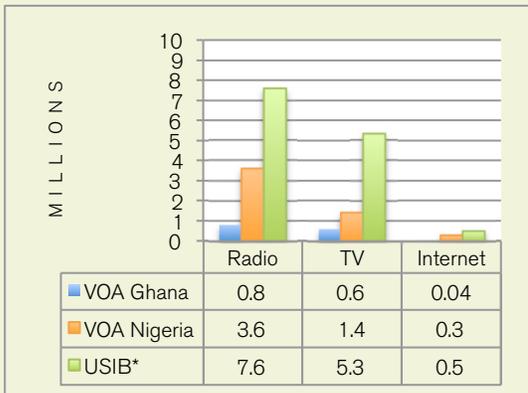
**Budget:** \$2,527,000

**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)

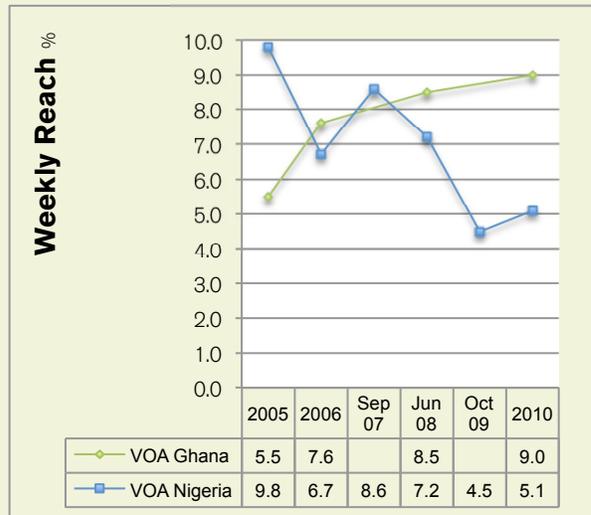
**Audience Size**



**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

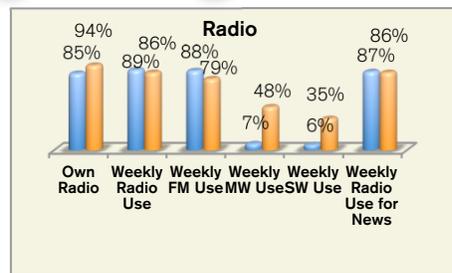
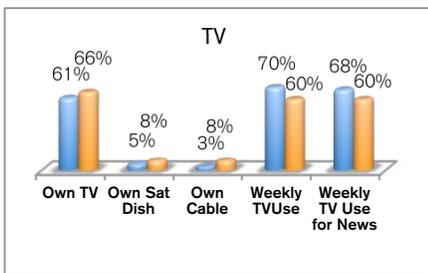
	VOA Ghana Sample	VOA Ghana Wkly. Aud.	VOA Nigeria Sample	VOA Nigeria Wkly. Aud.
<b>Sex</b>	%	%	%	%
<b>Male</b>	48	56	49	69
<b>Female</b>	52	44	51	31
<b>Age</b>				
<b>15-24</b>	32	30	28	34
<b>25-34</b>	28	27	28	34
<b>35-44</b>	16	14	18	18
<b>45-54</b>	11	16	14	9
<b>55-64</b>	7	8	9	3
<b>65+</b>	6	6	2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

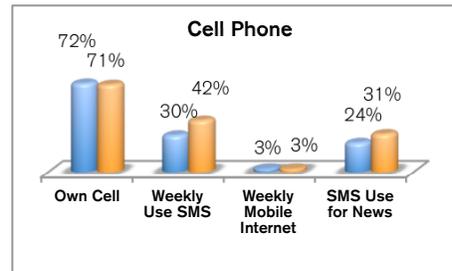
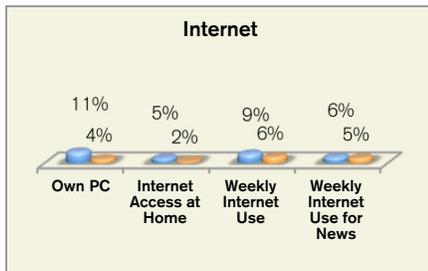


### Ghana Top Ten Sources of News

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*.

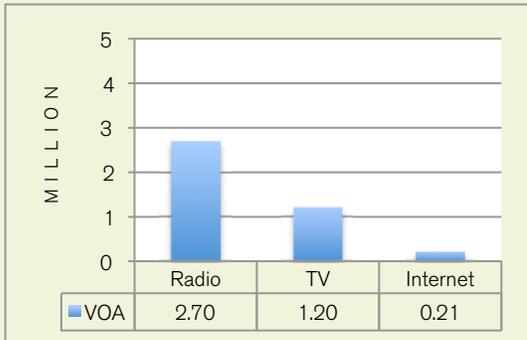
**New Media:** The Service has a website as well as active Facebook and Twitter accounts.

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

French to Africa

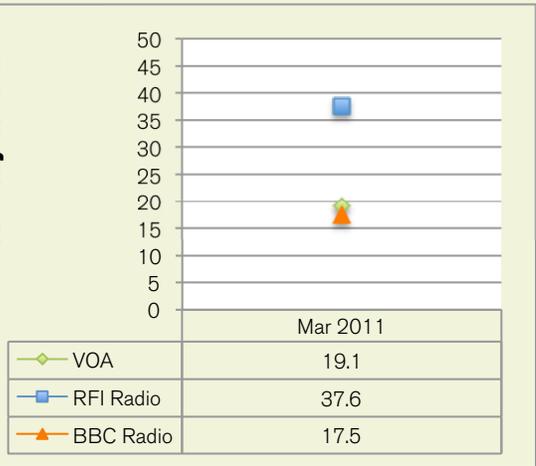
P E R F O R M A N C E D A T A (Using Data from DRC, March 2011)

**Audience Size**



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

**Weekly Reach %**



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 \*

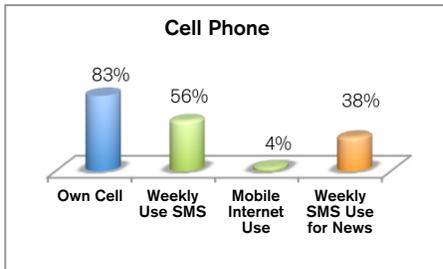
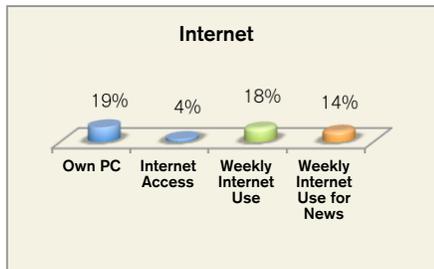
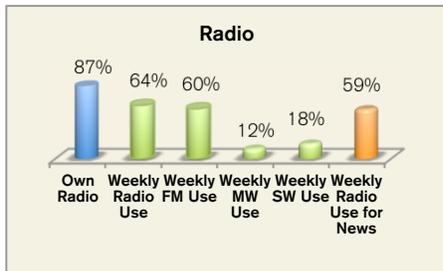
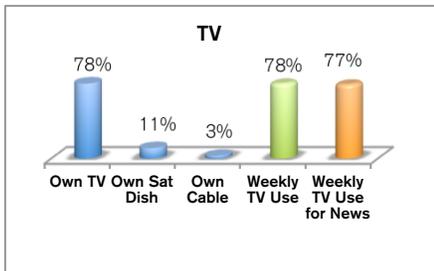
Total Pop. of Democratic Republic of Congo (DRC): 67.8 M

	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



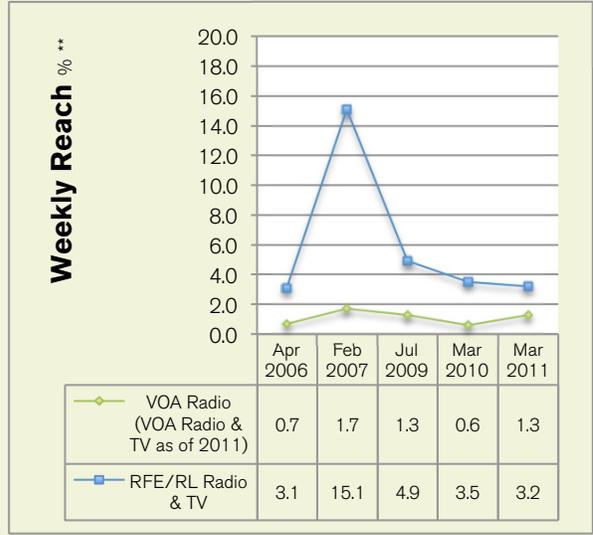
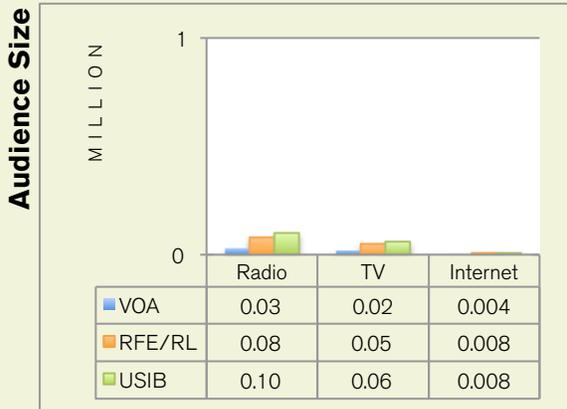
provided SW, Internet with live audio streaming, mobile site and fortnightly publication and distribution of newspapers in refugee enclaves.

**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

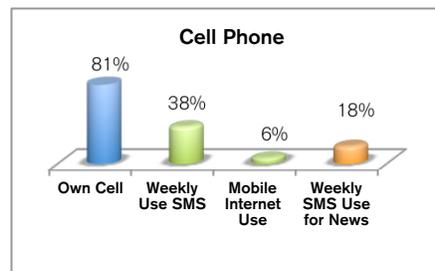
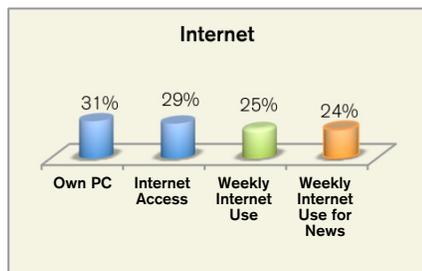
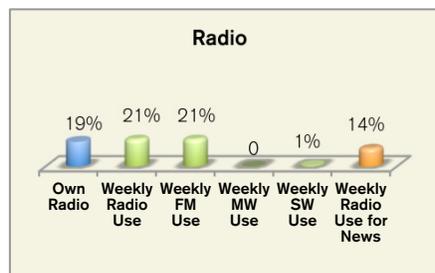
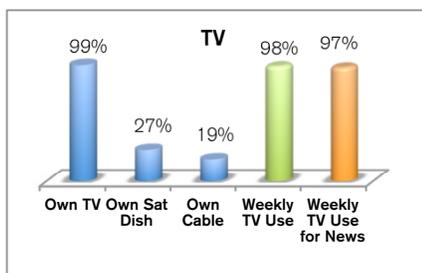
	Sample	VOA Annual Aud.*	RFE/RL Weekly Aud.
<b>Sex</b>	%	%	%
<b>Male</b>	46	55	53
<b>Female</b>	54	45	47
<b>Age</b>			
<b>15-24</b>	20	12	8
<b>25-34</b>	18	23	17
<b>35-44</b>	19	20	21
<b>45-54</b>	14	16	14
<b>55-64</b>	13	17	25
<b>65+</b>	17	12	15

	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.