

Reaching Millions, Changing Generations

Femina HIP's Role and Impact on the Tanzanian Media Scene





Summary

*Since 1999, Femina HIP has gradually expanded its product range and reach and today – little more than a decade later – Femina HIP is one of the most influential media platforms in the country. But Femina HIP is not like the other mainstream media houses. Femina HIP is a donor funded multi media platform targeting youth across the country with reliable, quality media products. Through its edutainment approach Femina HIP has created a family of popular and trusted lifestyle brands that dare to speak up about issues such as sexuality, health, jobs and money, the environment, entrepreneurship and good governance. In other words; **Femina HIP is on a mission...***

*This report sets out to explore Femina HIP's impact – both as an actor on the Tanzanian media scene and as a change maker among youth. Working with **behavior change communication** measuring impact is always a challenge. In this field, research often relies on qualitative data making it difficult to generalize findings. Therefore, the starting point for the analysis in this report is the Tanzania All Media and Product Survey (TAMPS) 2009, which is a comprehensive, professional media survey, mapping and documenting media habits and consumption in Tanzania.*

*Media consumption in Tanzania remains low and is characterized by a number of **gaps and inequalities**: To mention a few; men consume more media products than women, people living in rural areas have lower access to media than their urban peers and the level of media consumption is disproportional with the level of affluence.*

*The Tanzanian media landscape is changing. Though radio is still the dominant mass media it is slowly loosing its stronghold. While newspapers may play a key role in urban areas they remain somewhat of a rarity in rural Tanzania – home to 7 out of 10 Tanzanians. At the same time, TV is gaining ground across the country as is access to mobile and internet. In many respects, a quiet **media revolution** is taking place in the country changing the media habits of ordinary Tanzanians.*

*Femina HIP's media products are **strong brands** with an unparalleled reach – evidence from the TAMPS indicates that 1 out of 2 adult Tanzanians know the Femina HIP media platform and engage regularly with one or more of its products.*

*According to the audience itself, Femina HIP's media platform **makes a change**, both by raising awareness, by increasing knowledge and – most importantly – by changing behavior. Though extremely difficult to prove, evidence from the TAMPS suggests that by making print media available to the masses Femina HIP has played a leading part in creating a stronger reading culture among the Tanzanian youth. At the same time Femina HIP has - due to its unique distribution system and strong rural reach - been a key factor in fighting gender inequalities and reducing the urban-rural gap in media consumption.*



Contents

Introduction.....	4
Roadmap.....	4
Methodology and data	5
Trends, media and audience in Tanzania	7
Media consumption at a glance: A few mega trends.....	7
Print media - newspapers and magazines.....	9
Newspapers – yesterday’s news?.....	10
Magazines – ‘the winner takes it all’	10
Electronic media – radio, TV, web and mobile.....	11
Radio – ‘who killed the radio star?’	12
TV – ‘and the winner is...’	13
Web and mobile - ‘talking about a revolution’	13
Perceptions, feedback and impact.....	14
Si Mchezo! magazine: Empowering youth to take charge.....	15
Perception	15
Feedback.....	16
Impact.....	18
Fema TV talk show: Loved by audiences and a change maker among youth.....	20
Perception	20
Feedback.....	21
Impact.....	24
On the receiving end – profiles of our audience.....	25
The typical Si Mchezo! magazine reader.....	25
The typical Fema TV talk show viewer	28
Conclusion – ‘the times they are a changing’	31

Written by Ane-Kirstine Bagger, November 2010



Introduction

Since 1999, Femina HIP has produced and disseminated media products across Tanzania. What started out as a single product media initiative has during the past decade steadily evolved into a fully fledged media platform with circulation, reach and impact unparalleled by other media initiatives in the country. One of the reasons behind this success is that Femina HIP has been a **first mover**. Both when it comes to methodology, content and media channels, Femina HIP has **dared to take chances** and explore new ways of reaching Tanzanian youth with reliable, quality information. This has been alfa and omega in the creation of the popular, trusted life style media brands produced by Femina HIP today.

Media consumption in Tanzania remains relatively low. The media scene is characterized by a strong urban focus with the main part of media production and consumption taking place in the major cities, most notably in Dar es Salaam. This is especially true when it comes to print media, where people living in urban areas are more than twice as likely to read a newspaper as their rural peers. Traditionally, media has had a top-down focus reporting on the agendas of the decision makers making it difficult for Tanzanians to access the airwaves. During the past ten years, Femina HIP's mission has been to increase ordinary Tanzanians' role in media production and to make sure that their views, experiences and concerns are put on the agenda. By giving ordinary people a **voice** Femina HIP has established itself as a **sounding board** for those who are traditionally marginalized from the public debate. In this respect, Femina HIP can be characterized as a citizen media or a pro-poor media platform setting an agenda alternative to that of the mainstream, conventional media. This has proved to be a **receipt for success**. Femina HIP has been able to continuously expand its product range, its circulation and its audience and today Femina HIP is a **respected and influential actor** on the Tanzanian media scene.

Understanding the audiences and mapping the readers, viewers and listeners is **quintessential** for a focused and strategic development of Femina HIP's media platform. "**Money follows audiences**" might be a cliché but it is nevertheless true – not only for commercial media houses but also for civil society organizations dependant on donor funding. Donors support organizations who can document reach. The 'thumb suck' model for media planning is no longer adequate on today's competitive media arena. Detailed, reliable analysis of consumer trends and preferences is a necessity and by integrating TAMPS data in product development; Femina HIP can strategize future media planning and design.

Roadmap

This report is an analysis of Femina HIP's role on the contemporary Tanzanian media scene structured around three key dimensions of media planning:

Knowing your market is essential in order to understand reach. Comparing the awareness and popularity of Femina HIP media products to other Tanzanian media products is helpful in understanding Femina HIP's role and position vis-à-vis other media producers in the country. Therefore, the report sets out by giving an introduction to today's media landscape, outlining the reach of different media channels and mainstream media products.



Knowing your impact is essential for product development. Therefore the report continues to analyze the specific impact of two of Femina HIP's long term media products; Si Mchezo! magazine and Fema TV talk show focusing specifically on three parameters; perception, feedback and impact.

Knowing your audience is essential to ensure that media products resonate with audience needs and to ensure continued support and popularity. Therefore, the report finishes by drawing up profiles Si Mchezo! readers and Fema TV talk show viewers.

Methodology and data

The report builds on the extensive data collected for the **Tanzania All Media and Products Survey (TAMPS)** in September-October 2009 and released in December 2009. TAMPS is conducted every year by the private research company Synovate and is the most comprehensive survey of media habits and consumption in Tanzania.

The 2009 survey is the second national tracking survey of media consumption and habits in Tanzania looking at print, radio, television, internet and mobile phone services. The data collection is based on **two sampling methods**, face to face interviews and four weekly media consumption tracking surveys (self completion 7 day diaries). Data is analyzed by media spends, demographics, regional zones and Living Standard Measurements (LSMs).

The sample is **random and representative** and selected using the methodology and instruments recommended by the Pan African Media Research Organization (PAMRO). The total sample is **3,033 people**, 825 of these living in urban settings and 2,208 from rural areas. The survey divides the country into 8 zones: Dar es Salaam, Central, Northern, Southern, Lake, Coast, Zanzibar and Southern Highlands. Only adults above 15 years of age were included in the sample. This corresponds well with Femina HIP's primary target group being youth between the age of 15-25.

When extrapolated to the total population, the sample draws the following picture of **the Tanzanian population late 2009**: The total adult population is 23.3 million. Out of these, 52% are women and 48% are men. 71% live in rural Tanzania and 60% have a primary education.

There are however significant demographic variances between the zones, as summarized in the table below.

Key results from TAMPS 2009

*Every month more than **10 million Tanzanians** (44% of the adult population) engage with our media platform.*

*For **Fema magazine** the brand awareness is 9.8 million and the readership is 2.8 million per issue.*

*The **Si Mchezo!** brand is recognised by 6.8 million Tanzanians and each issue has 1.2 million readers.*

***Fema TV talk show** is known by 4.6 million Tanzanians. 3.4 million watch the show –out of these 1 million do so regularly.*

***Pilika Pilika** radio is estimated to have 5.4 million regular listeners and the **Chezasalama** website has more than 35.000 registered users.*

Zone	Profile			
	Rural / urban	Male / female	Age: 15-24 / 25-34 / > 35	Primary / secondary school
Dar es Salaam	0% / 100%	37% / 63%	51% / 22% / 26%	43% / 47%
Central	76% / 24%	43% / 57%	39% / 24% / 37%	60% / 19%
Northern	73% / 27%	40% / 60%	30% / 18% / 52%	58% / 32%
Southern	78% / 22%	46% / 54%	22% / 24% / 54%	75% / 14%
Lake	82% / 18%	54% / 46%	35% / 22% / 43%	61% / 27%
Coast	78% / 22%	44% / 56%	28% / 25% / 46%	70% / 20%
Zanzibar	55% / 45%	65% / 35%	39% / 24% / 37%	27% / 58%
Southern Highlands	22% / 78%	53% / 48%	40% / 28% / 32%	59% / 31%
TOTAL	71% / 29%	48% / 52%	36% / 23% / 31%	60% / 28%

By every means, **Dar es Salaam is an extreme outlier**. The region is 100% urbanized and has the youngest population in the country. It has an unbalanced male-female divide with 63% female inhabitants and a very high level of education compared to the rest of the country. At the other extreme is the **Southern Zone** with the lowest education level, the oldest population and a very low level of urbanization.

Whereas the general TAMPS data gives a detailed picture of the reach of Femina HIP’s media products, the data cannot say much about their impact. Therefore Femina HIP developed **a series of questions designed to measure impact and perception** of two of the media products, Si Mchezo! magazine and Fema TV talk show. These questions were asked to all respondents, who were aware of the products, and were designed to measure impact on three dimensions:

1. **Perception:** How do our audiences see us and how would they describe our media products?
2. **Feedback:** What do our audiences think about the products and how can we improve them?
3. **Impact:** How and to which extent do Si Mchezo! magazine and Fema TV talk show have a positive impact on the lives of our audiences and the choices they make?

The research questions were **carefully designed** to give a fair and true picture of the three dimensions. All questions are closed and the respondent is presented with a number of options – both positive / true statements and negative / false statements - in order not to lead the respondent in any specific way. The questions were formulated in an **easy language** and great care was taken during the translation from English to Kiswahili.

Trends, media and audience in Tanzania

As mentioned above, media consumption in Tanzania remains relatively low. **Access to media is challenged** both by poor distribution networks and by the fact that spending on media products remains a luxury.

Young men, living in urban areas with a high level of education and with a high LSM have the highest media consumption in Tanzania

Moreover, media consumption in Tanzania is **highly disproportional** when looking at variables such as gender, age, LSM and place of living. To little surprise, the highest media consumption in Tanzania is found among young urban men with a high education level and with a high LSM.

Media consumption at a glance: A few mega trends

- **Tanzanians living in urban areas consume more media products than their rural peers.** To little surprise, the biggest differences in urban-rural consumption are found for TV and newspapers. 75% of those living in urban areas watch TV every week; for those living in rural settings the figure is 30%. Only 18% of the rural population read a newspaper on a weekly basis. Among their urban peers the figure is 51%. For radio the numbers are 74% and 85% respectively and for magazines they are 6% and 13%. Radio remains the most pro-rural media with 85% of Tanzanians in urban areas and 74% in rural areas listening to radio on a weekly basis. Opposite what might be the general perception, magazines also appear quite pro-rural with 6% of the rural population having read a magazine within the last 7 days – in urban areas the figure is 13%. Femina HIP has a massive rural distribution and this might be an explanation behind this somewhat surprising result. If this is the case, Femina HIP has been a factor in reducing the urban-rural gap in print media consumption.
- **Men consume more media products than women.** The male-female divide is significant for all the main media products. The biggest difference is found when it comes to reading a newspaper (34% versus 21%), followed by listening to radio (83% versus 72%) and sending text messages (49% versus 41%). TV (46% versus 40%) and magazines (9% versus 7%) are the two media products where men and women are most equal in their consumption. Fema and Si Mchezo! magazines are distributed free of charge to youth across Tanzania. Both content and production process pay specific attention to girls and young women. Taking into account the magazines' massive print runs, it seems likely that Femina HIP has played a key role in creating the high level of gender equality in magazine consumption.
- **Media consumption decreases with age.** The young Tanzanians consume more media products than the older generations. 76% of the 15-17 year olds listen to radio every week – among those above 45 the share of weekly radio listeners decreases to 73%. For print media the picture is the same: 36% of the 15-17 year olds read a newspaper every week whereas only 18% of those above 45 read newspapers on a weekly basis. Only for SMS the consumption increases with age. Among youth between 15-17 33% send a text message every week – for those above 45 the same is true for 38%. This is somewhat surprising as younger generations traditionally adapt faster to new technologies but might be explained by the fact that only those with money to spend can afford to buy credit for their mobile phone. Finally, when it comes to reading magazines, consumption significantly decreases with age. The highest consumption is found between the 15-17 year olds



where 17% read a magazine on a weekly basis. For those above 45, the figure is as low as 3%. Again, as Femina HIP's print runs are unparalleled by any other print media in the country, and as the magazines are specifically distributed to youth, Fema and Si Mchezo! might be root causes for why magazine readers in Tanzania are so young.

- **Choice of media product depends on income level.** Affluence is significant for media spending. Radio and to some extent TV¹ can be characterized as pro-poor media products whereas magazines, newspapers and internet are for those with income to spend. Among the poorest (those who belong to LSM 1-4) radio is the most popular choice of media; 71% in this group listen to radio every week. The second choice among the poor is TV with 22% and newspapers with 14%. Radio and TV are also extremely popular among the middle income population – in LSM 5-7 88% listen to radio and 87% watch TV every week. Reading a newspaper is closely linked to income; only 14% of those in LSM 1-4 read a newspaper every week – among those in LSM 8-11 the figure is 83%. 1 out of 20 Tanzanians in LSM 1-4 reads magazines on a weekly basis – for those in LSM 12+ the share increases to 1 out of 3.

Femina HIP puts its fingerprint on media consumption

Evidence from the TAMPS indicates that Femina HIP plays a key role in fighting gender inequalities and in reducing the urban-rural gap in access and consumption of print titles. At the same time it seems likely that the distribution patterns of Fema and Si Mchezo! are pivotal for youth access to print media and plays a key role in increasing media consumption among the least affluent.

The picture of media consumption in Tanzania is however **not as simple** as it might seem. First of all, the supply and availability of media products is increasing rapidly. Today, Tanzania has 40+ TV channels, almost 100 radio stations and 80+ print titles. Within the last decade, the number of radio stations has mushroomed from 14 stations in 2000 to 95 stations in 2009. That is an increase of more than **600%**. Also the number of TV stations and print titles has been growing as has the access to mobile technology and internet. The fact that Tanzanians today have a much broader choice of media products creates a more demanding audience, a consumer base with higher expectations and a fiercer competition to attract readers and listeners.

The table below summarizes media consumption according to gender, age, place of living and LSM. Data refers to media consumption within the past 7 days.

Increase in the supply of media products in Tanzania is creating a more demanding and critical consumer base and a more competitive media landscape

¹ Mainly due to the popularity of communal watching

Product	Weekly media consumption in %													
	Total	Gender		Age					Geographical		LSM			
		Male	Female	15-17	18-24	25-34	35-44	45+	Rural	Urban	1-4	5-7	8-11	12+
Radio	77,1	82,6	72,1	76,2	81,6	77,0	77,4	72,8	74,0	84,9	71,4	88,4	93,6	94
Magazine	7,9	9,2	6,7	17,1	11,9	5,7	5,3	3,3	5,7	13,2	5,1	12,6	15,7	28,2
TV	42,7	45,9	39,7	52,6	52,0	41,6	38,9	31,9	29,5	74,9	22,0	87,4	95,0	100
Newspaper	27,6	34,0	21,9	36,4	35,9	24,9	26,1	18,4	18,2	50,8	14,2	50,7	68,2	82,5
Internet	1,8	2,9	0,9	0,9	2,5	2,3	1,6	1,9	1,0	3,8	1,1	1,4	7,4	38,2
SMS	44,7	48,8	41,0	32,5	50,3	48,7	49,3	37,5	35,7	66,8	30,6	72,3	84,5	89,3

The sections below look at the different types of media products and what characterizes them in terms of audience, reach and competition.

Print media - newspapers and magazines

Traditionally, print media has not had a strong reach in Tanzania. Even though a range of different newspapers and magazines are published, only limited numbers are circulated.

One of the major challenges for print media in Tanzania is **distribution**. Distribution is extremely challenging and expensive and only few companies offer this service. On top of this, distribution is restricted by poor infrastructure – especially during the rainy seasons.

Newspapers and magazines remain **luxury products** consumed by those with disposable income. A newspaper costs approximately 500 TSH while the price of a magazine ranges from 1,500 to 10,000 THS clearly excluding a large part of the population from consuming these media products. This shows how extremely important it is that Femina HIP's print products (Fema and Si Mchezo! magazines) are distributed free of charge in a country where 1/3 of the population is living beneath the poverty line.² Their reach and impact depend fully on them being free as their target groups typically do not have the necessary affluence to spend on media products.

At the same time, consumption of print media is much **higher in urban areas** than in rural settings – 1 out of 2 Tanzanians in urban settings read a newspaper every week – in rural areas the same is true for less than 1 out of 5. This is due to both higher affluence and availability of products in urbanized areas.

² According to the 2007 Household Budget Survey, National Bureau of Statistics, Tanzania



Consumption of print media is **dominated by men**. 34% of all men read a newspaper every week; for women the share is only 22%. 9% of all men read a magazine on a weekly basis but only 7% of all women get the same chance.

Both newspaper and magazine **copies are shared** among many readers. Newspapers are typically read by approximately 8 people; a magazine often has more than 15 readers.

Newspapers – yesterday’s news?

Circulation of newspapers in Tanzania remains low as most of the mainstream newspapers have **very limited print runs** and as distribution on a daily basis is extremely challenging. The most circulated newspapers are only distributed in around 40,000 copies. The centre of focus – both when it comes to readership and content – is the urban areas. Dar es Salaam and Zanzibar are outliers when it comes to newspaper reading: 75% of the Dar es Salaam population and 76% of the Zanzibarians read a newspaper every week. Mwanza comes in third with 40% followed by Arusha with 36%. At the other end of the scale we find Tabora, Manyara and Ruwuma where only 8%, 11% and 13% respectively read a newspaper on a weekly basis.

Nipashe is the most read newspaper with 10% of the total population having read a copy of this paper within the past 7 days. With 6% each, Mwanainchi and Michezo share the second place closely followed by Mtanzania on third place with 5%. Awareness and readership of the English language newspapers Daily News, The Citizen and The Guardian is very low. Only 1% of the total population has read one of these titles within the past 7 days.

Magazines – ‘the winner takes it all’

83 different magazine titles are published in Tanzania – a very high number compared to the number of magazine readers in the country. Every week these 83 magazines compete for 1.5 million readers³. In theory, this leaves each title with only 18,000 readers. Consequently, the majority of the magazines have very low print runs and very low reach.

The magazine market is characterized by ‘light content.’ Articles are easy to digest and focus on fashion, celebrities, music and sports. The majority is sold commercially, and most magazines get their primary income not from copies sold but from advertising. **Fema and Si Mchezo! magazines are exceptions to this rule** as they are non commercial⁴, have few advertising pages and offer a more ‘serious’ content focusing on topics such as health, sexuality, education, entrepreneurship, environment and good governance. Fema and Si Mchezo! also stand out as a large part of their content is produced and focused on life in rural Tanzania whereas mainstream magazines are

Fema magazine

Brand awareness: 9.8 million

Readership: 2.8 million

Si Mchezo! magazine

Brand awareness: 5.4 million

Readership: 1.2 million

³ According to the TAMPS 1.5 million Tanzanians read a magazine every week. At the same time, 2.8 million Tanzanians claim to have read Fema magazine within the past 7 days. These figures are puzzling but one explanation could be that some viewers perceive of Fema as a newspaper or a booklet.

⁴ Except for a very small share of Fema’s print run

often heavily Dar focused.

The typical magazine reader in Tanzania is a young male between 15-17 years old with a high income, living in an urban area. But, as argued above, gender inequalities are significantly lower for magazines than for other media products. Fema and Si Mchezo! magazines are **second to none** in Tanzania both when it comes to awareness and readership. Fema is by far the most read magazine in Tanzania with 12% of the population reading it every week – this is equivalent to almost 2.8 million readers. Si Mchezo! takes the second place with 5% of the population reading it on a weekly basis. As Si Mchezo! is not distributed countrywide, awareness and distribution depends heavily on geographical location. Kitangoma, Baab Kubwa and Jambo come in on a shared third place, each with approximately 1% of the population as weekly readers. Looking at awareness - both spontaneous and prompted – the same picture is true. 42% (26% spontaneous and 16% prompted) of all adult Tanzanians are aware of Fema magazine – this is equivalent to **9.8 million Tanzanians**. 23% (10% spontaneous and 13% prompted) are aware of Si Mchezo! magazine – equivalent to 5.4 million Tanzanians. Among the 15-17 year olds the figure is 30%. As a comparison, the awareness of Kitangoma, Baab Kubwa and Jambo is 12%, 10% and 8% respectively. These figures strongly underline that Fema and Si Mchezo! are **extremely strong brands**, highly recognized throughout the country.

Availability and affluence are key factors to **explain the success**. Newspapers and magazines remain luxury products in a country where poverty is high and household income for most people has to go directly to the necessities. This also means that most Tanzanians do not have a strong reading culture. Femina HIP’s media products are circulated free of charge in high numbers and in all districts of the country. This gives them an advantage vis-à-vis the commercial print media as they are accessible to all income groups and in all corners of the country.

The table below compares the readership of all magazines to the readership of Fema and Si Mchezo! magazines.

Magazine	Weekly media consumption in %													
	Total	Gender		Age					Geographical		LSM			
		Male	Female	15-17	18-24	25-34	35-44	45+	Rural	Urban	1-4	5-7	8-11	12+
All magazines	6,6	7,6	5,6	14,2	10,2	4,3	4,1	3,1	4,8	10,8	4,5	10	12,3	21,4
Fema	11,9	13	10,9	10,2	6,6	3,8	5,6	2	4,7	6,4	7,6	19,8	24,8	24,9
Si Mchezo!	5,2	6,3	4,1	29,7	17,5	9	8,4	2,3	8,3	20,6	4,4	5,5	8,7	9,5

Electronic media – radio, TV, web and mobile

Electronic media, especially radio, is dominating the Tanzanian media scene. Tanzania did not get its own TV channel until 1994 but since then the area has developed fast with more and more stations starting to air.



However, most programming on Tanzanian TV is bought from neighboring countries. Few shows are produced in Tanzania and the quality – both regarding content and technique – has generally not been up to standard. This might be one of the reasons why Femina HIP’s own TV production – Fema TV talk show – has gained such an incredible reach and popularity – it is one of the few examples of quality programming produced and aired in Tanzania.

Radio – ‘who killed the radio star?’

Early bird gets the worm. As in most African countries, radio was the first true mass media reaching extensive audiences across Tanzania. Today, this is still true, although data indicates that radio is losing some of its stronghold. From 2008 to 2009, the share of Tanzanians listening to radio on a weekly basis **decreased from 88% to 77%**. This figure, however, only includes those who listen on a traditional radio receiver. The growing number of Tanzanians listening to radio on their mobile phone is not included. Thus, it might be that in the Tanzanian case, it isn’t the video but the mobile phone that will finally get the best of the radio.

Radio does however, still have a reach, that is unparalleled by any other media channel. Moreover, radio **cuts across all major demographics**. Radio listeners come from all income groups, from all regions, and from all age groups. Even the gender divide is less significant when it comes to radio – 77% of all men and 72% of all women listen to radio every week.

One reason for radio having such a universal reach might be because of its communitarian profile. Radio is often a group activity and consumption can take place by many at the same time.

Since 2007, Femina HIP has partnered with other civil society organizations to air the weekly **Pilika Pilika radio show** produced by the production company MediaE. During its lifespan, Pilika Pilika has gained a large listenership and today an impressive 5.4 million Tanzanians follow the show. A main advantage of radio is that it overcomes the issues of **literacy**. Another advantage is that even though airtime costs have increased significantly recently, radio remains a **cost efficient** mass media. However, there are also constraints when working with radio: Liberalization and privatization of radio in Tanzania has made radio a complex media to work with. As the number of FM stations has mushroomed competition for listeners gets fierce and this sometimes affects the content and quality of programming. The rapidly growing number of FM stations makes the listenership **fragmented** and audiences difficult to capture and many stations compete mainly on light entertainment and music-based programming.

Fast Facts: Radio listening in Tanzania

- *With 77% of the Tanzanians listening to radio every week, radio is the most dominant media in Tanzania*
- *However, in 2008 the figure was 88%*
- *9% of the Tanzanians listen to radio on their mobile phone*
- *Radio Free Africa (RFA) and TBC Taifa have the largest share of listeners; 69% and 64% respectively*
- *Whereas TBC dominates in rural areas, RFA is strong in urban centers*



TV – ‘and the winner is...’

Tanzania got its first TV station in 1994 and as such TV is **still a novelty** in the country. The late arrival of television is also an explanation for why viewing is still somewhat low and why only little programming is produced nationally.

It is however **a myth** that TV viewing is an urban phenomenon. 58% of the TV viewers live in urban areas; 42% in rural settings. This is especially impressive with the fact that 7 out of 10 Tanzanians live in rural areas in mind.

It is also **a misperception** that TV viewing is only for the rich. Even though consumption does rise with income level, TV can to a large extent be characterized **a middle-class phenomenon**. Among the poorest Tanzanians (LSM 1-4), 22% watch TV every week. For those in the middle-income groups (LSM 5-7 and 8-11) the numbers are 87% and 95% respectively. All Tanzanians belonging to LSM 12+ watch TV every week.

Finally, Tanzanian TV **viewers are generally young**. 53% of the 15-17 year olds and 52% of the 18-24 year olds watch TV every week. Among the older generations TV reach is much lower. 42% of the 25-34 year olds, 39% of the 35-44 year olds and 32% of those above 45 watch TV on a weekly basis.

With Fema TV talk show Femina HIP has managed to create one of the most popular, long term shows in the country’s short **TV history**. According to the TAMPS, **4.6 million** Tanzanians are aware of the show and 3.4 million watch it. With one million regular viewers, Fema TV talk show takes the price as one of the most popular Tanzanian TV productions.

Web and mobile - ‘talking about a revolution’

Web and mobile are **newcomers** on the Tanzanian media scene but their reach and impact are likely to grow in the years to come.

Even though **internet penetration remains low** more and more Tanzanians – especially youth – are engaging with this media, not least through their mobile phones. Social networking sites are rapidly becoming popular making it important for Femina HIP to also embrace this media.

There are, however, **huge discrepancies** in the access to internet in Tanzania. First of all, 3% of all Tanzanian men have regular access to the internet – for women the figure is only 1%. Access in rural Tanzania is also significantly lower than in the country’s urbanized zones (1% and 4% respectively). In the lowest income groups, access to the internet is extremely rare. Only 1% of those living

Fast Facts: TV viewing in Tanzania

- 43% of the Tanzanians watch TV during an average week
- Men watch more TV than women; 19% of all men watch TV during an average week, for the women the figure is 12%
- 37% of all TV viewers are between 15-24 years old
- Contrary to what many think, TV is not an urban phenomenon. 58% of the TV viewers live in urban areas; 42% live in rural settings
- TBC and ITV have the largest share of viewers, 33% and 29% respectively

Fast Facts: Internet usage in Tanzania

- 2% of the Tanzanians have regular access to the internet
- In rural areas the figure is 1%; in urban settings it is 4%
- 1 out of 3 accessing the internet does so via a mobile phone
- E-mailing and chatting are among the most popular internet activities in Tanzania



in LSM1-4 have access – for those in LSM 12+ the figure is 38%. Interestingly, it is the 18-24 year olds who use the internet the most; 3% in this age group access every week. For the 15-17 year olds the figure is 1% and among those above 45 years of age 2% access the internet weekly.

Once on the internet, the Tanzanians **favorite activity** is general surfing. 22% of those accessing the internet use for academic purposes, 21% chat, 15% read about news and current affairs and 14% e-mail. 10% of the internet users claim to be a member of a **social networking site**; an activity specifically popular among young men. 14% of the men accessing the internet are members of a social networking site; the same is only true for 3% of the women.

Facebook is the most popular of the social networking sites, followed by Femina HIP’s interactive site **chezasalama.com**, hi5.com and Marafiki.com

Mobile technology and mobile phones are hugely popular and have in few years managed to penetrate the Tanzanian market. This makes mobile technology an interesting alternative to conventional media as it **cuts through traditional demographic factors**. Mobile technology is also important for internet access – 30% of those who access the internet do so via a mobile phone.

In Tanzania, 45% of the population send a **text message** every week – for 26% it is a daily activity. Men hit the keys more frequently than women. 48% of all men and 41 % of all women in Tanzania send a text message every week. Even among the lowest income groups, sending a text message is a common activity. 14% of those in LSM 1-4 and 51% of those in LSM 5-7 send a text message every week.

Mobile technology has the potential to **revolutionize media access** and consumption in Tanzania. The media is pro-poor and does not face the same distribution challenges as print media. It does have some literacy challenges but a huge advantage is that text messages can be kept, reused and shared and thus have some of the sustainability advantages of print media.

Fast Facts: Using a mobile in Tanzania

- *19% of the Tanzanians send a text message every week*
- *Men send more text messages than women. 22% of all men and 16% of all women send text messages every week*
- *In rural Tanzania 17% of the population send a text message every week; in the urban areas the figure is 22%*
- *17% of all Tanzanians make a call using a mobile phone every week*
- *Every week, 5% listen to radio using their mobile phone*

Perceptions, feedback and impact

As described above (Methodology and data), specific questions about Si Mchezo! magazine and Fema TV talk show were loaded into the TAMPS. These questions were designed to measure impact along **three dimensions**; perception, feedback and impact. Below, the results for each product are analyzed according to these three dimensions.



Si Mchezo! magazine: Empowering youth to take charge

Perception

The main target group of Si Mchezo! is out of school youth aged 15-25, particularly in rural areas. The magazine has had a strong focus on sexual and reproductive health including HIV/AIDS, but for some years it has also put emphasis on issues such as jobs and money, entrepreneurship and the environment. The language is tailored to the not so strong reader and supported by lots of graphics.

With **8 common 'prejudices'** about Si Mchezo! magazine as the starting point, the section below analyzes whether Si Mchezo! readers agree with this short description of the magazine or whether their perceptions differ from the magazine that Femina HIP set out to produce.

"Si Mchezo! is for people living in rural areas" – false. 52% of the Si Mchezo! readers either disagree or strongly disagree that Si Mchezo! is for people living in rural areas. This is interesting given the fact that Si Mchezo! actually has a very strong rural focus – both when it comes to where the issues are being produced and when it comes to the distribution strategy.

"Si Mchezo! is only for young people" – false. 71% of the Si Mchezo! readers either disagree or strongly disagree that Si Mchezo! is only for young people.

Si Mchezo! is mostly for people with HIV/AIDS" – false. 66% of the Si Mchezo! readers either disagree or strongly disagree that the magazine is mostly for people with HIV/AIDS – 16% neither agree or disagree. It is, however, interesting, that 18% do think that Si Mchezo! is for people living positively. This is probably due to the fact that Si Mchezo! in its early days had a stronger focus on HIV/AIDS and sexual health. The result deserves some attention though as it might indicate that being a Si Mchezo! reader to some people is stigmatizing.

"The information in Si Mchezo! can be trusted" – true. Si Mchezo! readers have a very big trust in the information they find in the magazine. 87% of the readers either strongly agree or agree that the information can be trusted. 9% do not know and only 4% do not think that they can trust what they read in Si Mchezo! These very positive findings show the importance of Si Mchezo!'s journalistic approach and production process documenting the lives of real people. The magazine portrays normal Tanzanians and the challenges they face and this makes the information in the magazine highly trustworthy.

"Si Mchezo! is a magazine about entrepreneurship" – true. 58% of all the Si Mchezo! readers either agree or strongly agree that Si Mchezo! is a magazine about entrepreneurship - 15% either disagree or strongly disagree. This is a very positive result as Si Mchezo! during the past years has put a strong focus on jobs and money showcasing young entrepreneurs. It also proves that the magazine is seen by many as more than just a magazine about health and HIV/AIDS.

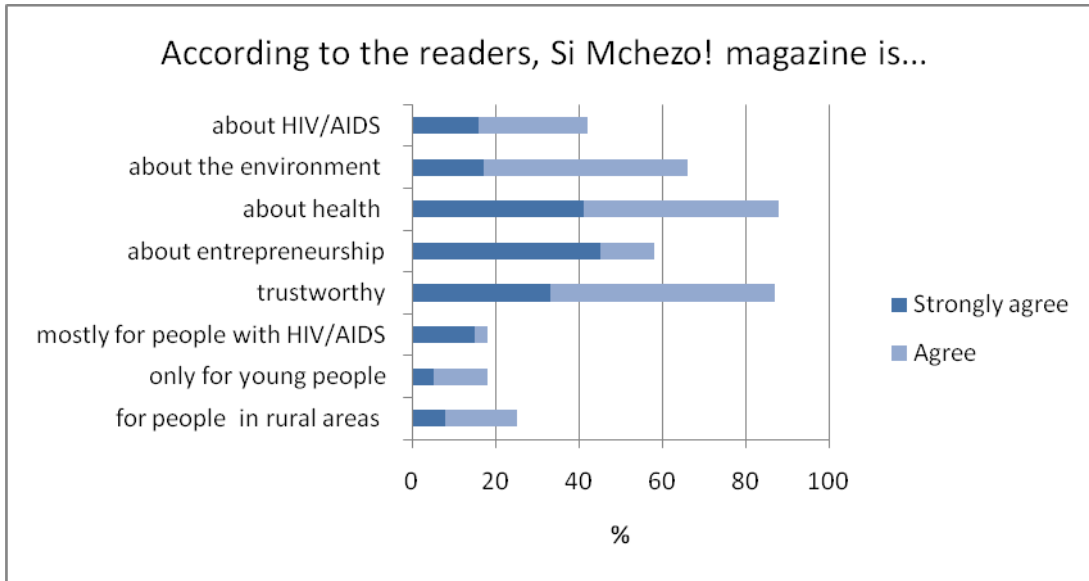
"Si Mchezo! is a magazine about health" – true. Si Mchezo! still has a strong health profile and 87% of the readers either agree or strongly agree that the magazine has a focus on health.

"Si Mchezo! is a magazine about the environment" – true. During recent years, Si Mchezo! has developed an agenda around environmentalism setting focus on climate change and environmental challenges. The



result is that 66% of all the Si Mchezo! readers either agree or strongly agree that Si Mchezo! is a magazine about the environment.

“Si Mchezo! is a magazine only about HIV/AIDS” – tiebreak! Interestingly, the readers cannot agree weather Si Mchezo! is a magazine about HIV/AIDS. 42% either agree or strongly agree that Si Mchezo! is a magazine only about HIV/AIDS. 43% either disagree or strongly disagree on the same. This shows how Si Mchezo! still has an image as being a magazine about HIV/AIDS despite the fact that the agenda today is much broader.

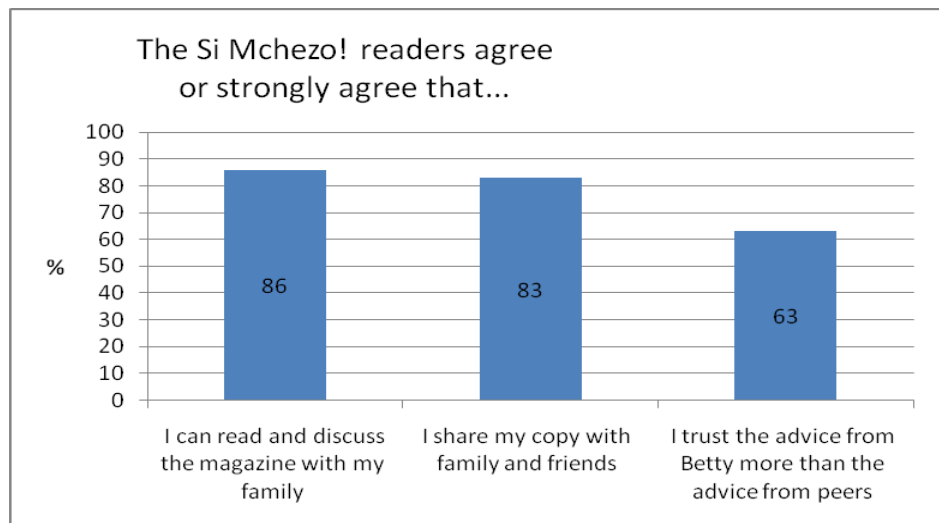


Feedback

Knowing the audience’s feedback is crucial for product development and vital for **staying in touch** with the readers. You need to learn the truth from the audience itself. Therefore we asked the Si Mchezo! readers what they think about the magazine and which topics that interest them most.

The figures below key feedback from Si Mchezo! readers.

The large majority (86%) say that they can read and discuss the magazine with their family. This is important as research shows that you learn more when you discuss what you



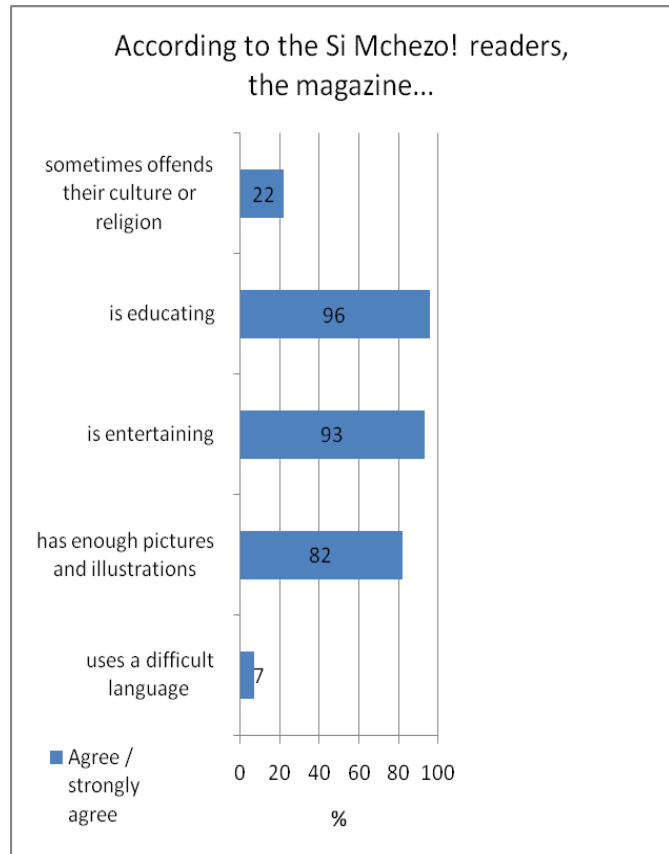
read with others. At the same time the result indicates that Si Mchezo! can be a **god tool for youth and their parents** to initiate discussions about sensitive issues such as sexuality.

63% of the readers state that they trust the advice in the 'Dear Betty' column more than the advice from peers. It is very important for the impact of the magazine that readers trust the information they are presented with and this result indicates that having both expert and peer advice is a good way of making as many readers as possible comfortable with the advice given.

Si Mchezo! is tailored to a semi literate audience and uses **graphics** to assist the not so strong readers. Therefore it is very positive that only 7% of the readers think that the language in the magazine is difficult to understand. At the same time it is also an important feedback that more than 8 out of 10 readers feel that the magazine has enough pictures and illustrations.

The data strongly supports that the **edutainment** approach is popular among the readers. 96% either agree or strongly agree that Si Mchezo! is educating while 93% either agree or strongly agree that the magazine is entertaining.

Si Mchezo! has a broad agenda and takes up a wide range of topics for discussion – everything from sexual health, good governance, the environment and entrepreneurship is debated in the magazine. But what catches the readers' attention and what are their favorite topics?



Readers were asked to rate 10 different topics on a scale from 1 to 10 (ten being the best). Here's what they said:

1. Agriculture (7,4 out of 10 points)
2. Politics and good governance (6,6 out of 10 points)
3. The environment (6,1 out of 10 points)
4. Entrepreneurship (6 out of 10 points)
5. Gender issues (5,9 out of 10 points)
6. Vulnerable groups (5,4 out of 10 points)

WHAT'S HOT AND WHAT'S NOT?

Top three topics:

1. Agriculture
2. Politics and good governance
3. The environment

Bottom three topics:

1. HIV/AIDS
2. Sexuality and reproductive health
3. General health



- 7. Relationships (5,3 out of 10 points)
- 8. General health (4,6 out of 10 points)
- 9. Sexuality and reproductive health (4,2 out of 10 points)
- 10. HIV/AIDS (3,8 out of 10 points)

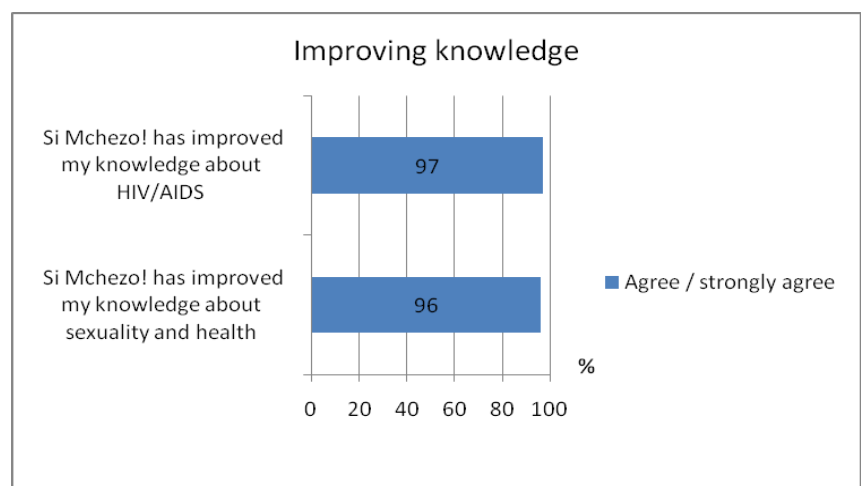
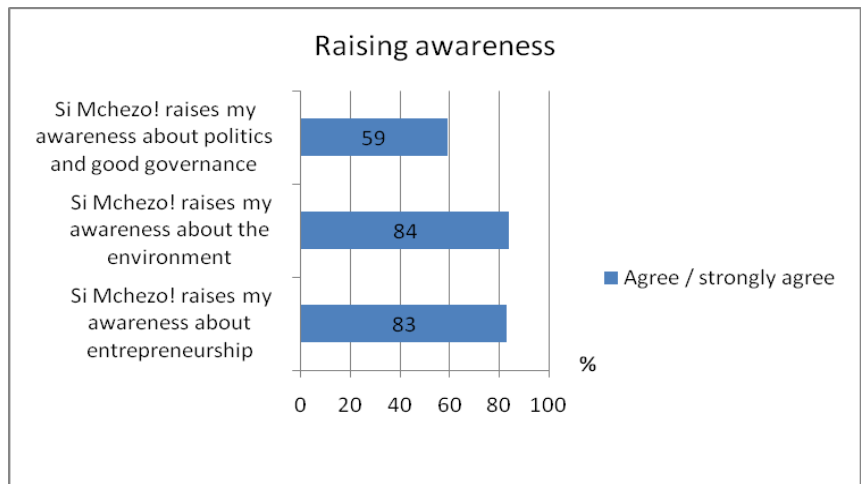
Interestingly, **agriculture** comes in as a clear winner. Si Mchezo! primarily targets the rural youth and has traditionally had focus on agriculture as a livelihood. However, the viewers who rate agriculture highest live in urban areas. Maybe this reflects recent years' **political focus** on kilimu kwanza?

Entrepreneurship comes in 4th and this topic is most popular among women living in rural areas. This might be because this group, more than anyone in Tanzania, needs assistance to create a safe livelihood for themselves helping them to refrain from risky behaviors and empowering them to make healthy choices.

Impact

Reach, perception and feedback are crucial for program development and planning but don't tell much about the impact of a media product. Working in the field of behavioral change communication showing impact is always a **huge challenge**. Nevertheless, documenting impact is absolutely necessary to attract partners and funding.

Within the fields of **communication for social change** and behavior change communication, impact is most often measured through qualitative data. This provides an important insight but the results are difficult to generalize. With the TAMPS data Femina HIP has tried to capture impact through quantitative data. Below is a short summary of the key findings according to **three impact dimensions**: Raising awareness, improving knowledge and changing behavior.



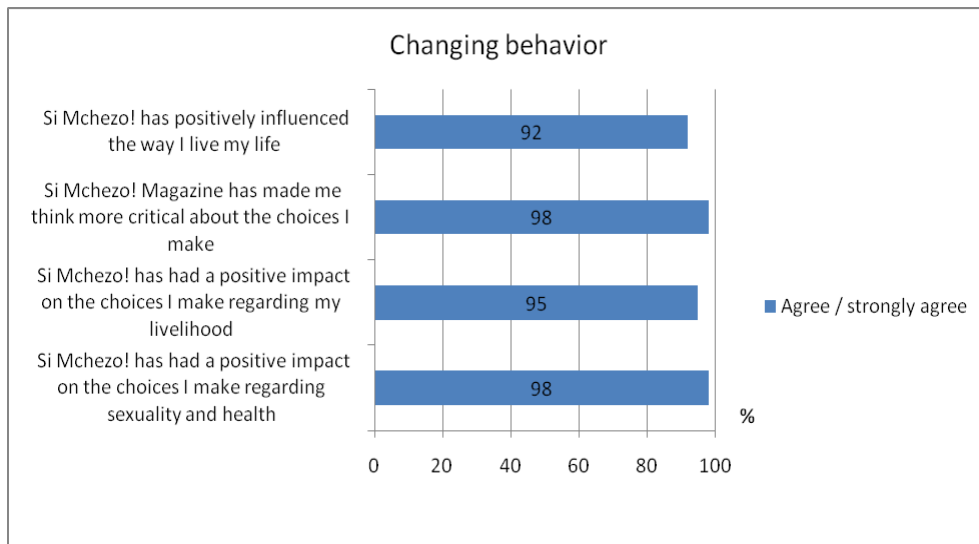
Si Mchezo! is **raising readers' awareness** about politics and good governance (59% either agree or strongly agree), about the environment (84% either agree or strongly agree) and about entrepreneurship (83%



either agree or strongly agree). During the last years, Si Mchezo! has developed a strong profile on entrepreneurship and environmental issues. The data strongly suggests that this has paid off and made reader's more aware of the issues.

Also when it comes to **improving knowledge**, the results are impressive. 97% of the readers either agree or strongly agree that Si Mchezo! has improved their knowledge about HIV/AIDS while 96% say that the magazine has improved their knowledge about sexuality and reproductive health. These figures clearly show that Si Mchezo! has a big impact when it comes to educating youth about crucial topics and empowering them to make informed choices.

Finally, and most importantly, Si Mchezo! also has a **significant and impressive impact on behavior**. 92% of the respondents say that the magazine has positively influenced the way they live their life. 98% either agree or strongly agree that Si Mchezo! has made them think more critically about the choices they make.



Looking at demographics some interesting differences appear. 96% of the male readers say that Si Mchezo! has positively influenced their life – for the women the figure is 88%. 88% of the urban readers say that Si Mchezo! has positively influenced their life – for their rural peers the figure is 96%.

When it comes to the positive impact on choices regarding livelihood there is a significant urban-rural divide. 90% of the readers living in urban areas think that Si Mchezo! has had a positive impact on the choices they make regarding livelihood – for those living in rural areas the figure is 100%.

Among those who say that Si Mchezo! has had a positive impact on the choices they make regarding sexuality and health, there are slightly more women than men and slightly more readers from rural areas. Moreover, the impact seems to be slightly higher on the youngest readers between 15-24.

This data is very strong proof that Si Mchezo! is **an important change maker** among its readers and that the magazine plays a vital role in **empowering youth** to protect themselves and make healthy choices.



Fema TV talk show: Loved by audiences and a change maker among youth

Perception

With Fema TV talk show, Femina HIP aims to air a TV show targeting youth and their families, in urban as well as in rural settings. The show portrays the life of ordinary Tanzanians, and puts contemporary - sometimes controversial - topics on the agenda. In few words, the show could be characterized as youthful, hip and daring. But is this also how the viewers would describe the show? With **9 common 'prejudices'** about Fema TV talk show as the point of departure, the section below analyses the viewers' perceptions of Fema TV talk show.

"Fema TV talk show is mostly for people living in urban areas" – false. 77% of all Fema TV talk show viewers either disagree or strongly disagree that the show is mostly for people living in urban areas.

"Fema TV talk show is for people of all ages" – true. The large majority (90%) of all the viewers think that Fema TV talk show is for people of all ages. Even though the primary target group for the show is youth aged 15-24, the data supports that the show is also seen as relevant for the secondary target group – young people's families. The result underlines the fact that TV viewing in Tanzania is communal, and often a family activity.

"Only people with an education can understand Fema TV talk show" – false. 81% of all Fema TV talk show viewers either disagree or strongly disagree that the show can only be understood by people with an education. This does, however, leave almost 1 out of 5 viewers with the belief that the show is primary for educated people. Unfortunately the data does not allow us to say whether these people themselves have an education, but the data does show that neither LSM nor place of living (urban-rural) seem to influence the result.

"Fema TV talk show is a program about HIV/AIDS" - true. Fema TV talk show is still strongly identified as a show about HIV/AIDS. 88% of the viewers either agree or strongly agree that the show is about this topic. This can probably be explained by the fact that the Femina HIP media platform in its early days was promoted as an initiative with a primary focus on reproductive health and HIV/AIDS. Even though the agenda for years now has been much broader this shows how difficult it is to change the way consumers see a product and the values they identify it with.

"Fema TV talk show is a program about entrepreneurship" – tiebreak! 53% of all Fema TV talk show viewers either agree or strongly agree that the show is about entrepreneurship. This shows that the show does have an entrepreneurship profile but only 13% of the viewers strongly identify Fema TV talk show with this topic. Given the fact that the show only in recent years has started including entrepreneurship on its agenda, the results are in fact quite positive.

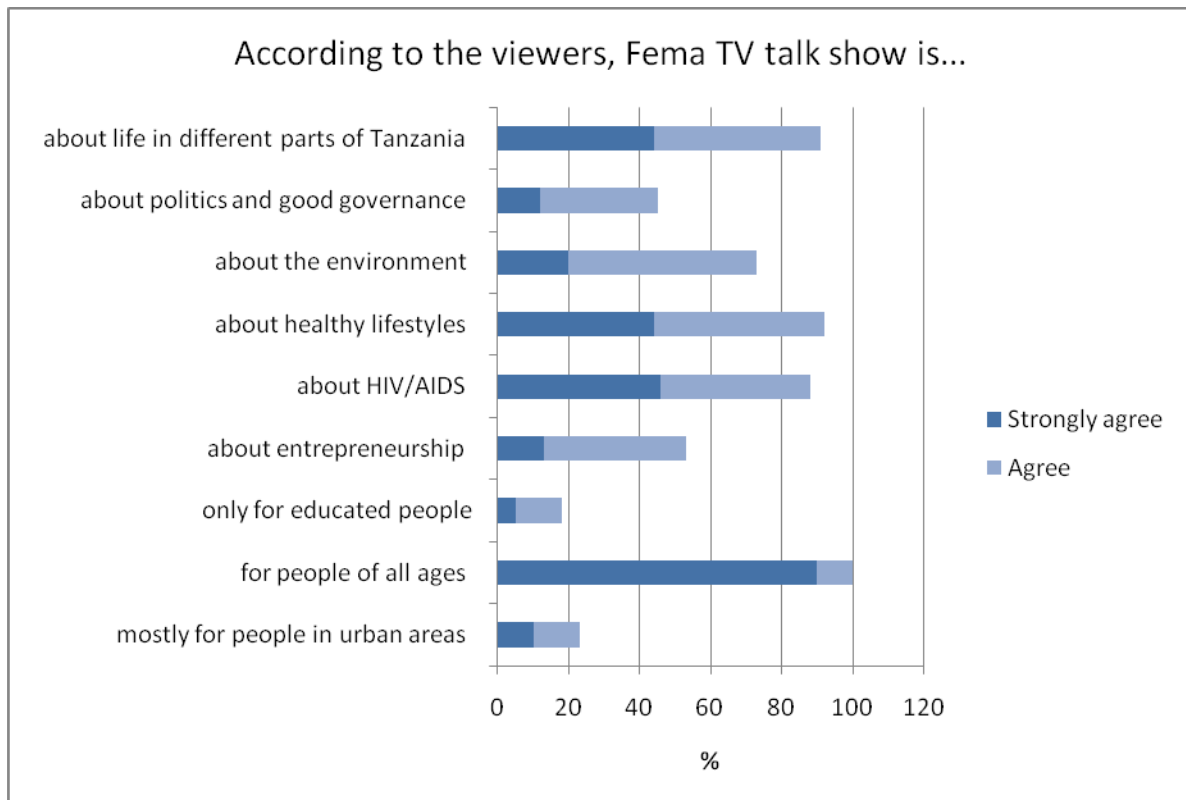
"Fema TV talk show is a program about the environment" – true! Even though the environment is a relatively new topic on the agenda in Fema TV talk show the show has already managed to establish itself as a product identified with the environment. 88% of the viewers either agree or strongly agree that the show is about the environment. Only 5% of the viewers strongly disagree that the show is about the environment.

"Fema TV talk show is a program about healthy lifestyles" – true. 9 out of 10 Fema TV talk show viewers (92%) either agree or strongly agree that the show is about healthy lifestyles. This confirms that the Fema TV brand is still strongly identified with health and healthy lifestyles.



“Fema TV talk show is a program about politics and good governance” – true. More than half (55%) of the viewers identify Fema TV talk show with politics and good governance. This can probably be explained by the fact that the show sometimes invites politicians into the studio to discuss youth politics and ‘hot topics’. In connection with the 2005 elections a series of shows focusing on voter education were aired and again for the 2010 elections (after the TAMPS data was collected) Fema TV talk show urged youth to go to the ballots.

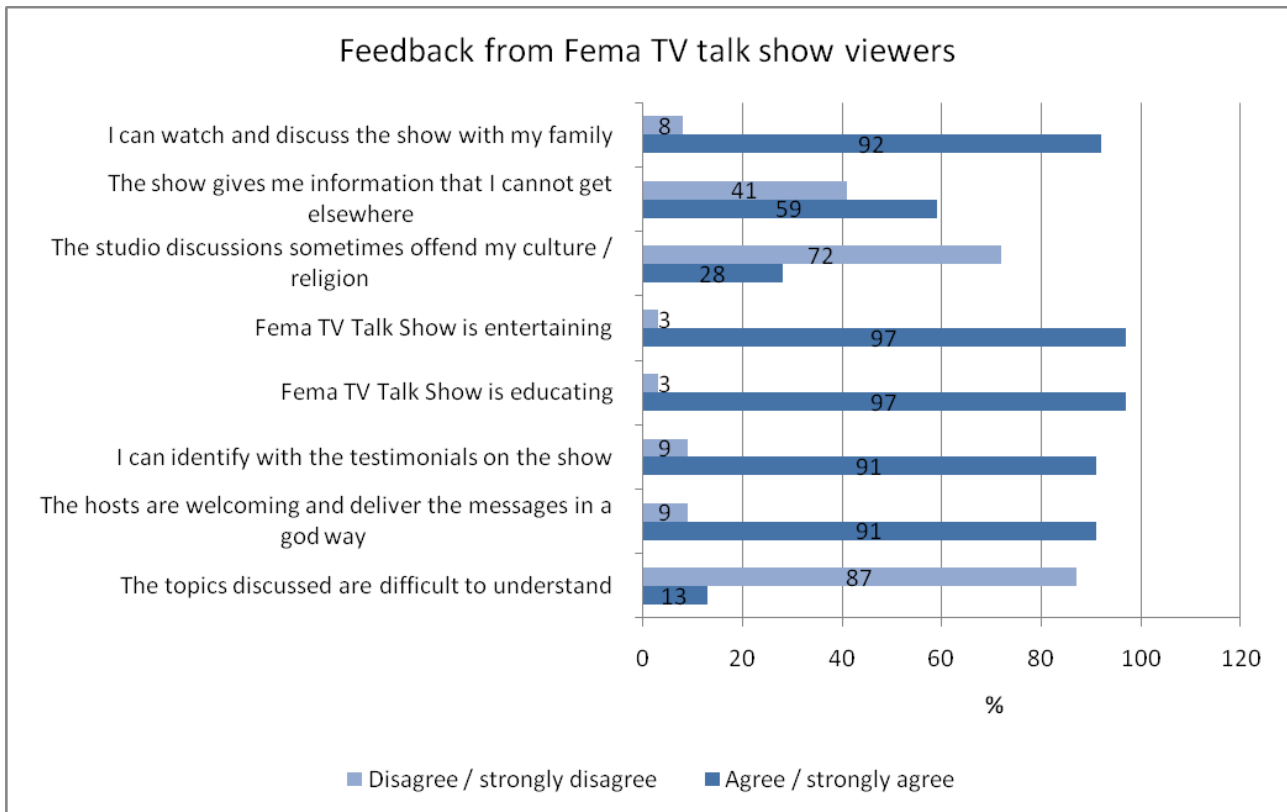
“Fema TV talk show is a program mirroring life in different parts of Tanzania” – true. More than 9 out of 10 viewers (93%) either agree or strongly agree that Fema TV talk show mirrors life in different parts of Tanzania indicating that the on the road shows make a difference. Taking the show to the people has created a strong sense of ownership and belonging and is one of the unique things about the show.



Feedback

The high number of viewers indicates that the show is popular and presents the viewers with something they are interested in. But if we ask the viewers themselves, what do they say about the show? Knowing the audience’s feedback is crucial for product development and vital for staying popular in an increasingly competitive TV market. The section below explores the what viewers think about Fema TV talk show and gives some **clear hints** towards which elements and topics are hot – and which are not!

The figure below summarizes key feedback from Fema TV talk show viewers.



It is very positive that 9 out of 10 Fema TV talk show viewers feel that they can watch and discuss the show with their family. As TV viewing in Tanzania is often a family activity it is crucial that **parents and children feel comfortable** watching the show together. As Fema TV talk show often discuss controversial topics, finding the right balance between being progressive on one hand and being socially acceptable on the other is essential. The data supports the idea of Fema TV talk show as **a key icebreaker** when parents and children want to talk about sensitive topics.

This finding is supported by the fact that the majority (72%) of the viewers either disagree or strongly disagree that the show offends their culture or religion. It is however important to note that 3 out of 10 viewers do think that the show is offensive. Again, finding **the right balance** for a show that wants to push the boundaries and **promote free talk** about sexuality is challenging! What attracts some viewers might scare others away. But with 7 out of 10 viewers disagreeing that the show is offensive the data indicates that Fema TV talk show has found just that right balance.

The viewers also agree that the show is both entertaining and educating. 97% of the viewers either agree or strongly agree that the shows are entertaining and educating. This indicates that Fema TV talk show’s **edutainment methodology is resonating with the audience**.

Another very positive finding is that 91% of the viewers can **identify with the testimonials** in the show. The testimonials are a key element of Fema TV talk show and support the show’s aim to portrait the life of ordinary citizens. Testimonials give viewers role models and tell stories from everyday life that viewers can relate to and mirror themselves in.



Finally, **the hosts are very popular** and get good ratings from the viewers. 91% of the viewers either agree or strongly agree that the hosts are welcoming and deliver the messages in a good way. This is a very positive finding as popular hosts that act as role models for the viewers are extremely important in order to **get the message through**.

Fema TV talk show takes up a wide range of topics – from sexuality to entrepreneurship and politics. But what interests our viewers the most and what are their favorite topics? Viewers were asked to rate 9 different topics on a scale from 1 to 10 (ten being the best). Here's what they said:

1. Youth leadership (7 out of 10 points)
2. Civic education (7 out of 10 points)
3. Reading culture (6,9 out of 10 points)
4. Entrepreneurship (6,3 out of 10 points)
5. Vulnerable groups (5,7 out of 10 points)
6. HIV/AIDS (4,5 out of 10 points)
7. Environment (4,1 out of 10 points)
8. Sexuality / reproductive health (3,8 out of 10 points)
9. How to make the right choices in life (3,2 out of 10 points)

WHAT'S HOT AND WHAT'S NOT?

Top three topics:

1. Youth leadership
2. Civic education
3. Reading culture

Bottom three topics:

1. How to make the right choices in life
2. Sexuality / reproductive health
3. The environment

Each episode of Fema TV talk show has certain elements. The show is opened by a testimonial followed by a studio discussion. Other elements include vox pops, Bahati's Corner and the OneLove sketch. But which element is most popular and attracts most viewers? **Fema TV talk show viewers were asked to rank** the five core elements of the show (5 being the best). **Here's what they said:**

1. Testimonial (ranked 3,4 out of 5)
2. OneLove sketch (ranked 3,4 out of 5)
3. Bahati's Corner (ranked 3,3 out of 5)
4. Studio discussion (ranked 3,2 out of 5)
5. Vox pop (ranked 2,8 out of 5)

The testimonial and the OneLove sketch share the first place closely followed by Bahati's corner on third place. However, there is **not any clear winner or loser**. This indicates that all topics appeal to the audience. A cross examination of the data shows that gender and place of living do not seem to be significant for how the elements are rated. The OneLove sketch and the testimonial are slightly more

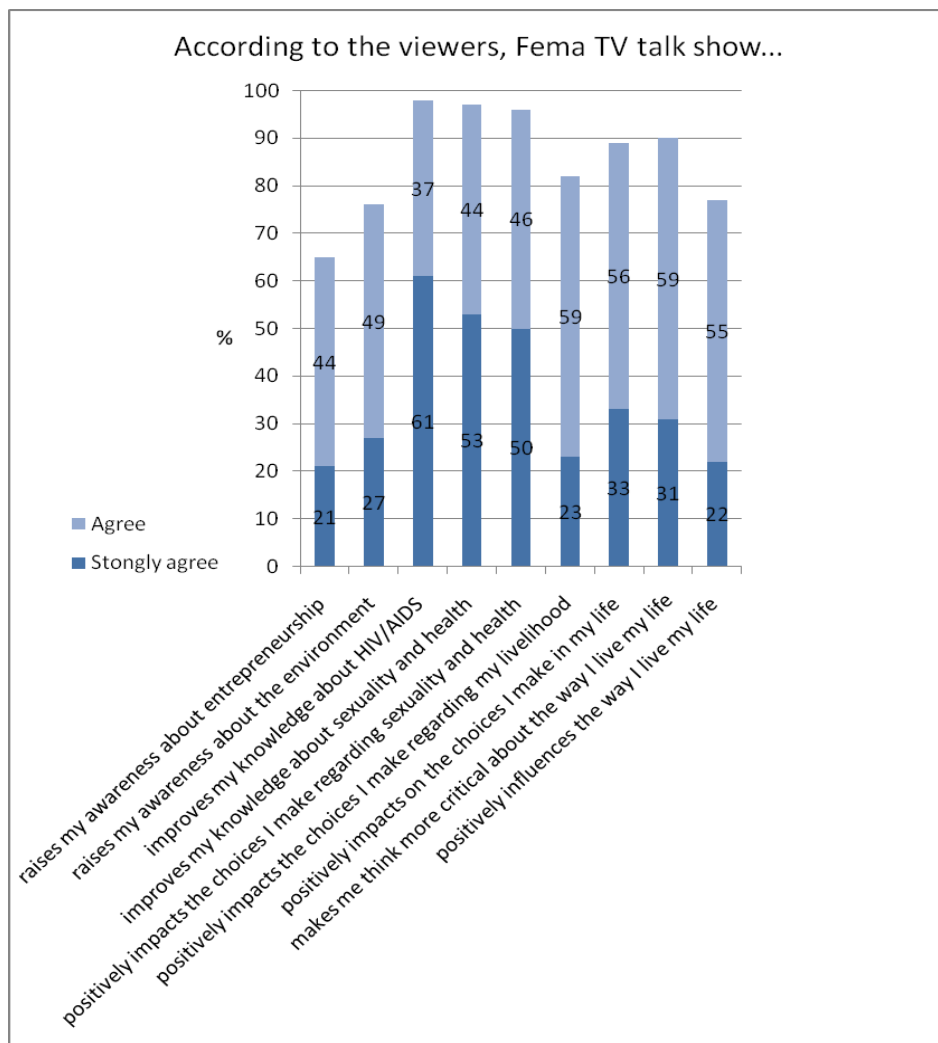


popular among women living in urban areas. At the same time, the vox pops are a bit more popular among men living in rural areas.

Impact

So what difference does it make? As described above, measuring impact is always challenging within the field of behavioral change communication. The best option might be to ask the audience themselves and that’s just what we did. Below is a short analysis of what the audiences feel they have gained from watching Fema TV talk show. Again the analysis looks at **three dimensions**; raising awareness, improving knowledge and changing behavior.

The results speak for themselves! According to the viewers themselves, Fema TV talk show has a very positive impact and seems to be a significant **change maker** when it comes to raising awareness, increasing knowledge and changing behaviors.



The viewers agree that Fema TV talk show **raises awareness** about the environment and entrepreneurship. 65% think that the show raises their awareness about entrepreneurship – 76% feel that the show raises their awareness about environmental issues.



98% of the viewers say that the show has **improved their knowledge** about HIV/AIDS. For sexuality and health the figure is 97%.

But most importantly, the show seems to have a **significant impact on the audience's behavior**. 89% of the viewers either agree or strongly agree that Fema TV talk show positively impacts the choices they make in their lives. **90% say that the show makes them think more critical about the way they live their life** and 77% state that Fema TV talk show positively influences the way they live their life. At the same time, 82% of the viewers say that the show has a positive impact on the choices they make regarding their livelihood and **96% either agree or strongly agree that Fema TV talk show has a positive impact on the choices they make regarding sexuality and health**.

Generally, **demographics** do not seem to be significant for the impact. However, there are a few small exceptions, especially between men and women and between Tanzanians living in rural settings and their urban peers. For example, when it comes to the positive impact on the choices the viewers make regarding sexuality and health, the impact is slightly higher among women living in urban areas. Among the viewers who agree that the show has positively influenced the way they live their life, the impact is significantly higher among viewers living in rural Tanzania.

An impact like this is very rare in the field of behavior change communication and leaves Fema TV talk show as an extremely effective and positive instrument in **empowering young people to make informed choices and bring positive change to their lives**.

On the receiving end – profiles of our audience

So who are they; these 10+ million Tanzanians who engage with Femina HIP's media products? How old are they? Are most of them male or female? And is the majority living in rural areas or should we look in the bigger cities to find them? And not least - do they match Femina HIP's target group?

The typical Si Mchezo! magazine reader

Since its launch in 2002, Si Mchezo! Magazine has expanded its reach significantly and as shown above, today more than 1.2 million Tanzanians read the magazine every week.

The typical Si Mchezo! reader is a 15-17 year old man with a primary school education living in Iringa

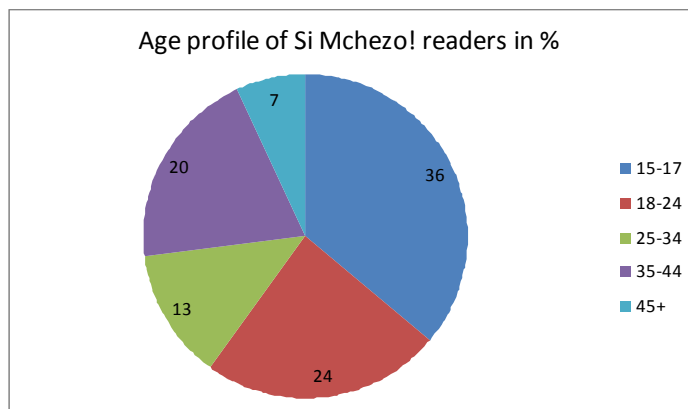
The target group is semi literate; out of school youth aged 15-24 and their communities primarily in rural Tanzania. Even though Si Mchezo! has a strong rural profile the magazine is expanding throughout the country including less developed urban areas. This makes the Si Mchezo! audience **quite different from the typical media consumer** in Tanzania, who is more educated, more affluent and more prone to live in urban areas. By targeting this segment of the Tanzanian population Femina HIP is reaching out to those that are not normally not interesting to mainstream, commercial media.

So who are these Si Mchezo! readers? How old are they, what is their education level and where should we go look for them? The table below compares the average magazine reader in Tanzania with Si Mchezo! readers.

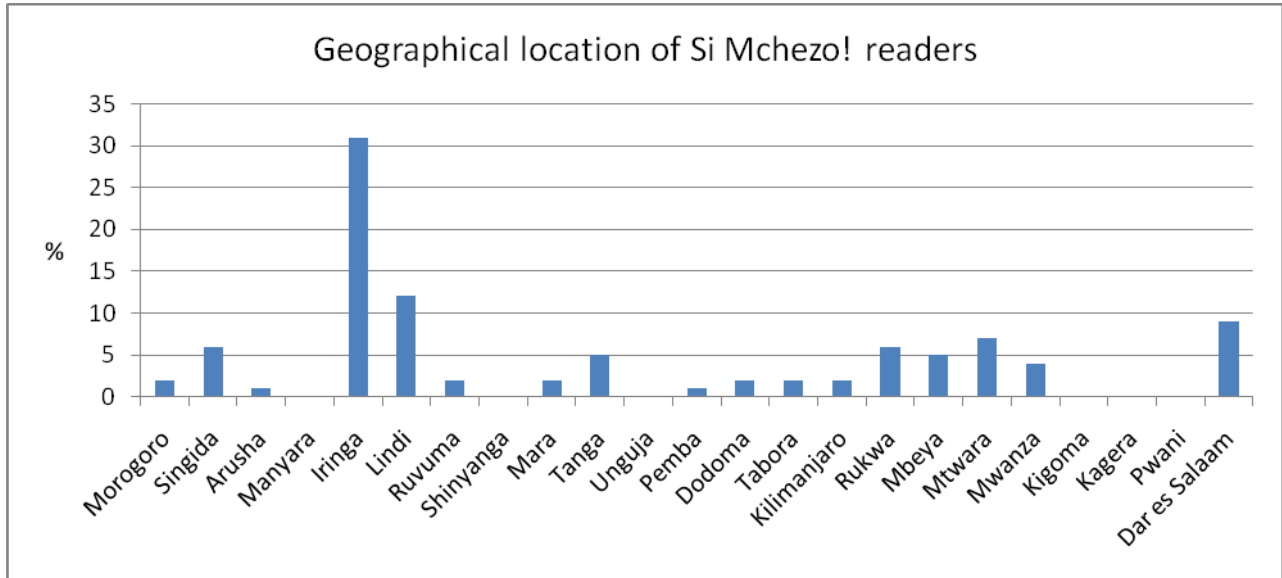
Awareness and viewership of Si Mchezo! magazine in % (base: Tanzanians who is aware of Si Mchezo! magazine)														
	Total	Gender		Age					Geographical		LSM			
		Male	Female	15-17	18-24	25-34	35-44	45+	Rural	Urban	1-4	5-7	8-11	12+
Reads a magazine (base: total population)	7,9	9,2	6,7	17,1	11,9	5,7	5,3	3,3	5,7	13,2	5,1	12,6	15,7	28,2
Aware of Si Mchezo!	23,3	24,3	22,3	39,8	31,1	20,9	20,6	10,6	20,5	30,0	19,8	28,6	32,7	45,8
Reads Si Mchezo!	5,2	6,3	4,2	10,2	6,6	3,8	5,6	2,0	4,7	6,4	4,4	5,5	8,7	9,5

Interestingly, Si Mchezo! has a good **male-female balance**. 24% of all Tanzanian men are aware of the magazine – the same is true for 22% of all Tanzanian women. Also among the readers, women are well represented. 4% of all women in Tanzania read Si Mchezo! on a weekly basis – for men the figure 6% leaving the gender gap for Si Mchezo! readers at only 2%. 52% of all Si Mchezo! readers are men, 48% are women. These data underline that reading Si Mchezo! a magazine is a gender balanced activity.

Another interesting finding is the readers' **age profile**. The Si Mchezo! readers are young and there is a very good match between primary target group and actual readers. 60% of the readers are between 15 and 24 years old, 13% are between 25 and 34 and 20% are between 35 and 44. It is interesting that the 35-44 year olds are so well represented among Si Mchezo! readers but it could point in the direction that young Si Mchezo! readers are sharing the magazine with their parents. The age profile clearly shows that both the primary target group (youth) and the secondary target group (their communities) are clearly engaging with the magazine.

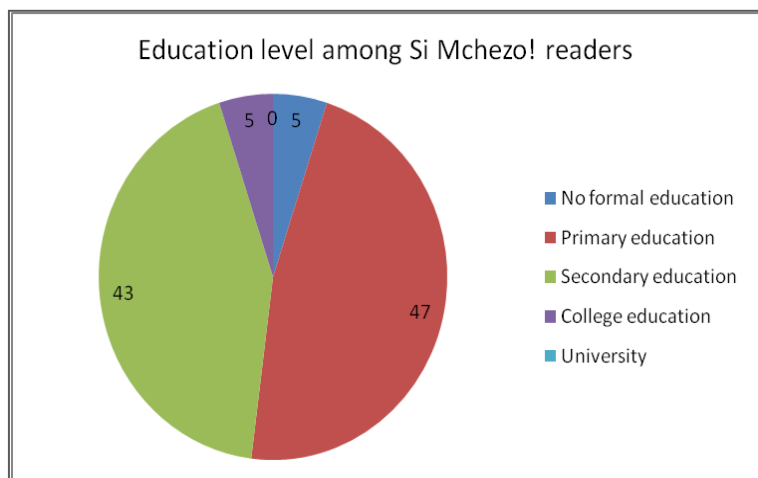


Almost half (45%) of the Si Mchezo! readers live in rural areas underlining the magazine's **strong rural presence**. As mentioned above, Si Mchezo! is not distributed nationwide and therefore there are not Si Mchezo! readers in all regions.



The top three regions are Iringa with 31% of the Si Mchezo! readers, Lindi with 12% of the Si Mchezo! readers and Dar es Salaam with 9% of the Si Mchezo! readers. The bottom three is Arusha, Pemba and Dodoma with 1%, 1% and 2% of all the Si Mchezo! readers respectively. This clearly shows how Si Mchezo! has managed to **break the monopoly of largest cities'** (such as Dar es Salaam, Mwanza and Arusha) as centers of media consumption.

Looking at the **education level** of Si Mchezo! readers it is somewhat surprising that a big share (43%) of the readers has a secondary education. 47% has a primary education while only 5% has no formal education. The primary target group for Si Mchezo! is the segment of young Tanzanians who never make it to secondary school and who has a low literacy level. However, the data indicates that the target group is in reality much broader. Many secondary school students



read the magazine as well. This perhaps indicates that the literacy level and the reading culture even among secondary school are lower than expected. It might also indicate that Si Mchezo!'s strong focus on **vocational training** and jobs is also appealing to secondary school students who are realizing that getting formal employment is perhaps even more difficult to find than **the famous needle in the hay stack**.

The analysis of who the Si Mchezo! readers are highlighted some interesting characteristics. In general, the Si Mchezo! readership can be characterized as follows:

- Si Mchezo! is reaching the youngest segment of magazine readers (the 15-17 year olds)
- Si Mchezo! is contradicting the traditional urban-rural gap in magazine reading



- Si Mchezo! is read almost as frequently by someone with a secondary education as by someone with a primary education

This indicates that Si Mchezo! is an **effective tool in breaking the traditional inequalities** in media consumption in Tanzania – both when it comes to gender imbalances and the urban-rural gap. At the same time Si Mchezo! is read by those who traditionally have a weak reading culture and a low media consumption and thus the magazine is **nursing new generations of critical media consumers in Tanzania.**

The typical Fema TV talk show viewer

As shown above, Fema TV talk show is hugely popular and has **millions of viewers across the country.** The show was first launched in 2002 and since then, its popularity has grown steadily. The target group for the show is young Tanzanians aged 15-25 living in urban and rural settings. As TV viewing in Tanzania is often communal, the secondary target group is the youth’s families. TV is often watched together with family members, neighbors and peers and it often takes place at the local community center or bar.

As many shows are shot **‘on the road’**, a strong affiliation and sense of ownership has been created with the rural audiences. The out of studio segments portrait life in rural Tanzania and provide the viewers with a voice. These shows are immensely popular and make Fema TV talk show unique in Tanzania. When the TV team travels to the field they are often welcomed as **true TV stars** and celebrities!

The typical Fema TV talk show viewer is hard to describe. There’s a 50/50 % chance that the viewers is a woman, and a 50/50% chance that she lives in rural Tanzania. She is most likely between 18 and 24 years old

But who are all these viewers? Where do they live, how old are they and what is their income level? The table below compares the average TV viewer in Tanzania with Fema TV talk shows viewers.

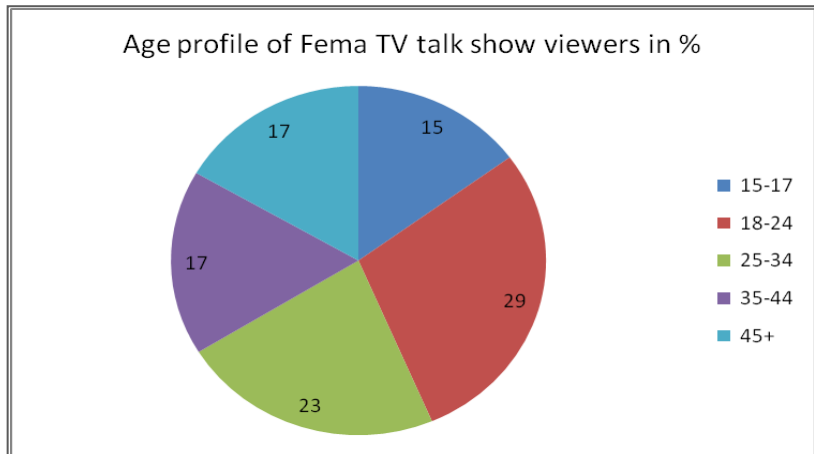
Awareness and viewership of Fema TV talk show in % (base: Tanzanians who watch TV on a weekly basis)														
	Total	Gender		Age					Geographical		LSM			
		Male	Female	15-17	18-24	25-34	35-44	45+	Rural	Urban	1-4	5-7	8-11	12+
Watch TV (base: total population)	42,2	45,9	39,7	52,6	52,0	41,6	38,9	31,9	29,5	74,9	22,0	87,4	98,0	100
Aware of the show	41,7	34,7	49,1	49,8	48,4	37,3	41,3	29,9	28,5	54,3	19,2	45,8	63,9	70,3
Views the show (monthly)	25,4	20,4	30,8	26,8	29,7	23,0	26,5	19,1	14,2	36,3	11,4	25,6	40,7	56,8

One of the striking things is, that Fema TV talk show has a **strong gender profile** – in general, men watch more TV than women, but when it comes to Fema TV talk show **the tables have turned:** 49% of all female



TV viewers are aware of the show and 31% of all female TV viewers watch the show at least once a month. For men, the figures are 35% and 20% respectively. Looking at Fema TV talk show viewers exclusively, 49% are female and 51% are male – a very gender balanced result bearing in mind that TV viewing is traditionally male dominated in Tanzania. One explanation might be that the show over the years has had strong female hosts and thus provided generations of young Tanzanian women with **female role models**.

Another interesting thing is the viewers' **age profile**. Even though the show's primary target group is youth aged 15-25, age does not seem to be a significant factor. 34% of the viewers are older than 35 years, 23% are between 25 and 34 years old and the remaining 44% fall under the primary target group of youth aged 15-24. The data thus shows that the primary target group is indeed engaging with the show

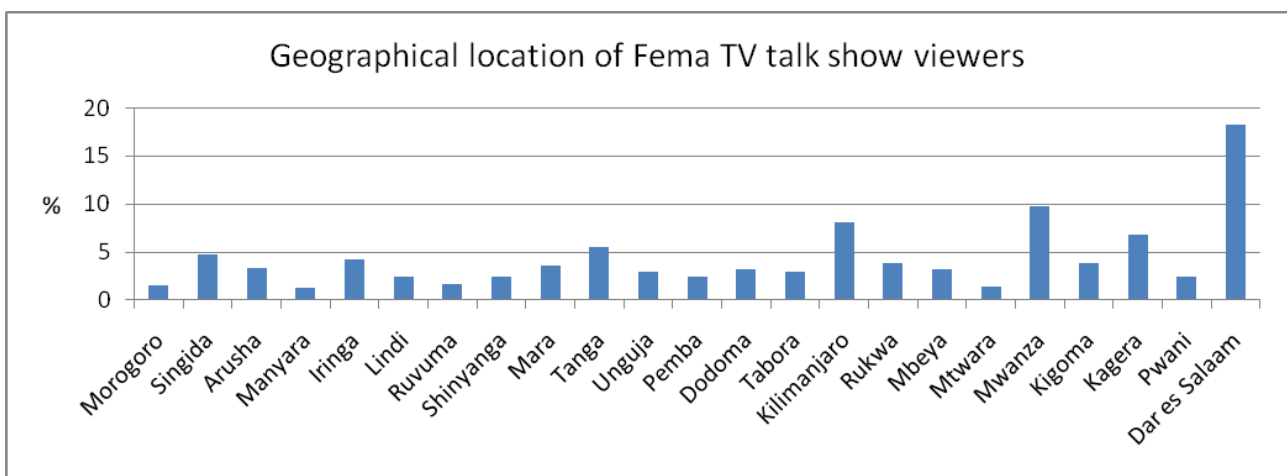


but so is the secondary target group; the parents and extended families.

Looking at where Fema TV talk show viewers live, there also a **surprise**. 49% of the viewers live in rural areas – 51% live in urban settings. This is quite extraordinary - especially bearing in mind that 58% of all TV viewers live in urban areas – and underlines Fema TV talk show's **stronghold and impact in rural Tanzania**.

This proves to show that on two central audience dimensions – gender and place of living - **Fema TV talk show breaks traditional TV demographics**.

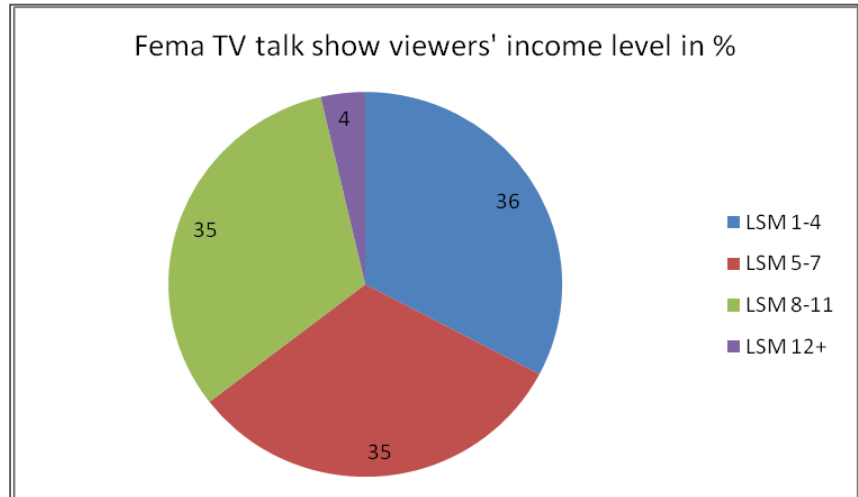
Looking more specifically at where the viewers live, the top three areas are: Dar es Salaam (18% of all Fema TV talk show viewers), Mwanza (10% of all Fema TV talk show viewers) and Kilimanjaro (8% of all Fema TV talk show viewers). In the bottom three we find Manyara, Morogoro and Mtwara with 1%, 1% and 2% of all Fema TV talk show viewers respectively. The graph below shows where the Fema TV talk show audience lives:





Apart from Dar es Salaam – which by all means is a statistical outlier – it is surprising how evenly the viewers are spread throughout the country. This again underlines, that Fema TV talk show is **not an urban phenomenon** – rather it has a strong rural profile and manages to capture audiences throughout the country.

Finally, looking at the **income level** the data clearly shows, that a remarkable share of the viewers are in LSM 1-4 and that a big share of viewers belong to the middle class. These figures must be read conservatively as they also strongly reflect the general LSM composition of Tanzania with the large majority of Tanzanians living in the lowest LSM groups.



The analysis of who the Fema TV talk show viewers are has revealed some very interesting characteristics and the Fema TV talk show viewership can be summarized as follows:

- Fema TV talk show has a very gender balanced viewership
- Fema TV talk show is minimizing the urban-rural gap in TV viewing
- Fema TV talk show is appealing both to its primary and secondary target groups
- Fema TV talk show's popularity is not dependant on income level

With Fema TV talk show Femina HIP has created a program that **cuts through all traditional demographics and unites viewers across gender, age and income differences**. Fema TV talk show is strong evidence of Femina HIP's success in creating a pro-poor, gender balanced media product giving ordinary citizens access to media.



Conclusion – ‘the times they are a changing’

Traditionally, the media scene in Tanzania has had an urban focus with a top-down approach concentrating on the agenda of decision makers and other influential groups. Still today, media consumption is limited and dominated by a number of **gaps and inequalities**: Men consume more media products than women, media consumption increases with income level and Tanzanians living in urban settings consume more media products than their rural peers. When it comes to media channels, radio has for many years been dominating the media scene while TV has gradually increased its reach; especially among the middle income groups. Print media – especially newspapers – is characterized by low circulation and low readership.

However, as argued in this report, **the Tanzanian media landscape is changing**. New products, channels and distribution strategies make media less exclusive. At the same time, the fact that Tanzanians today have a broader choice of media products creates a more demanding audience, a consumer base with higher expectations and a fiercer competition to attract readers and listeners.

Even though the gaps and inequalities are still there media consumption is changing and gradually becoming more inclusive. As the data analysis in the report indicates, Femina HIP has played a key role in kick-starting and fueling this **slow but steady media revolution**.

First of all, Femina HIP’s distribution strategy and business model⁵ together support access to media among the less affluent and those living in rural areas – i.e. the groups that are traditionally marginalized from mainstream media. This strategy has proved extremely successful and today more than **10 million** Tanzanians engage with one or more of Femina HIP’s media products every month. A clear example of the success is Fema magazine. The brand is recognized by almost half the adult population and 2.8 million Tanzanians read it every week. Together with the popular Si Mchezo! magazine, Femina HIP has a unique position in the print media landscape and a potential to **make a real change** in the lives of millions of people.

And so they do. Femina HIP’s media products have a real impact on their audience. Looking at Si Mchezo! magazine, the analysis of the TAMPS data clearly shows that the magazine is **an important change maker** among its readers and plays a vital role in **empowering youth** to protect themselves and make healthy choices. According to the readers themselves, Si Mchezo! magazine has a strong effect both when it comes to raising awareness, improving knowledge and changing behavior. At the same time, the data strongly indicates, that Si Mchezo! is an **effective tool in breaking the traditional inequalities** in media consumption in Tanzania – both when it comes to gender imbalances and the urban-rural gap. At the same time Si Mchezo! is read by those who traditionally have a weak reading culture and a low media consumption and thus the magazine is **nursing new generations of critical media consumers in Tanzania**.

Fema TV talk show also comes out as **a straight A student**. The show positively raises awareness, improves knowledge and changes behavior. The large majority of viewers feel that the show empowers them to make informed choices and bring positive change to their lives.

⁵ I.e. distribution of media products free of charge



At the same time the show is actively breaking some of the traditional inequalities in Tanzanian media consumption. The Fema TV talk show viewers are very gender balanced even though TV viewing is traditionally male dominated. One explanation might be that the show over the years has had strong female hosts and thus provided generations of young Tanzanian women with **female role models**. Taking the show on the road has been extremely popular and Fema TV talk show has a strong viewership in rural Tanzania. This indicates that on two central audience dimensions – gender and place of living - **Fema TV talk show breaks traditional TV demographics**. Finally, by daring to speak up about sensitive issues that are not normally debated in Tanzanian media, Fema TV talk show is expanding the range of issues that can be discussed in public.

The TAPS data has provided a unique insight into the contemporary media scene in Tanzania. It has both reconfirmed some '**old truths**' but also pointed out some **new trends**. Media consumption is not static but evolves with changing structures in society. During the past 10 years Femina HIP has managed to establish itself as a central actor on the Tanzanian media scene and actively worked to create a more inclusive and open media. Femina HIP's media platform is a **change maker** among its audiences across Tanzania making a difference to the millions of people engaging with its media products. Media production and consumption cannot be revolutionized over night but Femina HIP is playing key position in making that '**great leap forward**' that will enable the majority of Tanzanians to access media and raise their voice.