Ghana Policy Report Summary

The primary lesson from the AudienceScapes national survey in Ghana is that the demographic and behavioral characteristics of various target populations should be key determinants of how critical public interest information is communicated to and shared with them. This may seem obvious to many development practitioners, but the value added by the AudienceScapes survey is to provide an empirical foundation for such an approach, which is often based by necessity on the anecdotal experiences of those in the field.

The data highlight statistically significant variations in information access, use and preferences among key demographic segments—notably, between rural and urban respondents, men and women, people with varying levels of education and those living in different regions of the country—all of which are analyzed in this report.

Furthermore, the survey shows that detailed baseline research on media use, ICT use, and communication habits and preferences can be applied directly to development work, which is illustrated in the report by a few hypothetical case studies.

The following is a comprehensive summary of the report's key insights:

I. Establishing the Development Communication Context in Ghana

This section of the report sets the scene for demographic parsing of the survey data by providing insight into popular perceptions of Ghana's development priorities and goals, as well as levels of trust in various institutions and levels of interest in various topics featured in the media.

- Given the frequent need for development organizations to work with local institutional partners, the survey asked about relative levels of trust in national institutions. **The results show nongovernmental institutions, such as banks, the media and major companies received higher trust ratings than did official bodies such as parliament and the courts. The sole exception to the latter is the military**, which led all institutions in trust levels. Local NGOs also received high marks.
- **When asked about a range of key development topics, the vast majority of respondents are most concerned about bread-and-butter issues such as unemployment and the cost of living, as well as corruption and crime**. They cited specific development issues such as availability of drinking water and education as far less important at the national level, in part because people from different demographic groups or geographic areas expressed different priorities among these issues. Few respondents saw censorship of the media as problematic.
- **When asked about topics that attract their attention in traditional media (radio, TV and print), respondents gave relatively high marks to development-heavy topics** such as health, the environment and agriculture (all attracted "a great deal of attention" from respondents). Women seem to pay less attention than men to all topics except health.

- **When asked about Ghana's progress so far in a range of Millennium Development Goals set for completion by 2015, a clear majority feel progress has been made**. This is despite objective measures showing the country still lags in several of these areas.

II. Information Sources and Information Gathering

The reach of traditional media is far from uniform throughout the country. Meanwhile, reliable internet connections are out of reach for most citizens. Mobile phones, however, are opening up a powerful new avenue of communication and information-sharing for the population, but their full promise as an empowering communication tool has yet to be fulfilled.

- **Traditional media continue to play dominant roles in informing Ghanaians and as preferential information sources. Even when using the internet or mobile phones, Ghanaians often use them to access information from traditional sources**. For example, they will use the internet to access a newspaper's website or listen to radio stations using their mobile phones.
- **In terms of access to media and ICTs, radio and mobile phones are the most universally widespread, with radio clearly the most widely used information source**. TV is also largely accessible (but much more so in urban than rural areas). TV and word-of-mouth networks far outpaced new ICTs and formal public information sources, such as billboards and pamphlets. Ninety percent of respondents said they had listened to the radio in the last week; virtually all of them said they use radio *to get news and information* on at least a weekly basis.
- **Nearly as many respondents report getting news and information from SMS services as from newspapers**, suggesting that at least in terms of national averages, mobile phones are already as important a source of information as some traditional media sources.
- **Women in the survey are less likely than men to have household access to media outlets and ICTs, despite this survey being designed to adjust for this trend**. It may reflect women's assessments that they do not have access to a particular media outlet or ICT in their household if they do not use that particular item or are denied use of it.
- **Trust in SMS-delivered information is rather low and significantly trails trust in a number of other sources** such as radio, TV and friends/family. However, this partly reflects a lack of familiarity with SMS as a source of news, given that many people did not answer the question or said they do not use SMS news and information. Only 7 percent of respondents described SMS news as untrustworthy.
- **A principle obstacle to accessing various information and communication conduits in rural areas is lack of adequate and reliable electricity**. Rural survey respondents are four times more likely than urbanites to say their households have no electricity. **Another access obstacle for rural residents is the limited reaches of radio, TV and phone signals**.
- **Language diversity in Ghana is a critical factor in any development communication plan, particularly in rural areas. Only about 30 percent of rural respondents (and 55 percent of**

urban respondents) say they can easily read English, the official language of Ghana. When asked which language they speak most often, nearly one-fifth of rural respondents named a language other than English, French (spoken by some people in areas bordering neighboring Francophone countries) or the 10-most common indigenous Ghanaian languages.

Word-of-Mouth Communication

- **Nearly 40 percent of those surveyed said they discuss general news and information with other people in their community at least once a week; around three-quarters said they do so at least monthly**. Rural residents, in particular, said word-of-mouth sources provide trustworthy information. Rural residents also rely more heavily on word-of-mouth sources, such as friends/family and other people in the community for regular news.
- **Although word-of-mouth is an important source of information for both genders, men report much more frequent word-of-mouth information-sharing activity than women**, suggesting that reliance on this communication mode to inform or engage women in discussions may be more challenging than with men.

Traditional media trends

- **Nearly all radio listeners (defined as people who said they listened to the radio within the last year) say they tune to FM stations regularly (in the last week); other wavebands are far less popular**. A substantial minority say they have listened to the radio via mobile phone.
- **The radio market is active and diverse**. Respondents were asked to name up to three stations they listen to most often. Among the top 10 stations named, most were only mentioned by between 5 percent and 10 percent of respondents, reflecting a wide range of radio preferences.
- **The data suggest a limited selection of TV channels is available to most Ghanaians**. Virtually all respondents with a TV at home said they receive their signal through an antenna only and receive between one and six channels. Four channels dominated viewer frequency ratings: GTV, TV3, Metro TV and TV Africa. Urban and rural viewing habits showed notable differences.
- **A substantial majority of respondents express trust in news and information on TV**. Considering so few stations are available to most viewers, this likely reflects opinions of the big four stations.
- **Survey respondents connected to the main power grid for electricity are three times more likely to have a television at home and almost four times more likely to have a computer or internet access**. Electricity is a key determinant in respondents' access to a wide variety of information sources and communication tools.
- **Reach of newspapers is far smaller than for radio and TV—only about a fifth of those surveyed said they had read a newspaper in the last week**. These readers had a distinct profile—predominantly young, educated men in urban areas (particularly the capital, Accra) with

relatively higher incomes. Only four newspapers (the *Daily Graphic*, the *Junior Graphic*, the *Mirror* and the *Ghanaian Times*) were mentioned by at least 5 percent of respondents nationally as ones they read most often, once again reflecting a diverse media market

Mobile phones and SMS text messaging

- **Mobile phone use is widespread, albeit in varying intensities. Three-quarters of respondents said they had used a mobile phone for some purpose in the last week; 88 percent had used a phone in the last year**. There was an urban-rural use gap, but use rates were still high in rural areas (85 percent of urban respondents had used a mobile in the last week, versus 70 percent of rural residents). Demographically, the most pronounced use-pattern differences were related to respondents' levels of education (which emerged as a proxy in the data for general socio-economic status).
- **Despite the broad reach of mobile phones, the survey indicates the predominant function for most people is voice calling**. Use of SMS services is clearly expanding, but may be running up against literacy walls among certain demographic segments; the survey data suggested that English literacy, in particular, is a key determinant of SMS use rates.
- **Use patterns differ markedly between mobile phone owners and non-owners, with the latter group lagging far behind in nearly all function categories**. This has implications for development efforts focused on mobile phones used in a shared environment (e.g. a community phone) as opposed to an owner-focused approach.
- **Among those who own mobile phones, most said they had not been owners for more than five years**, indicating this is a new technology to most Ghanaian adults. Most non-owners said they are able to borrow a phone when necessary.
- **Young adult (15-30) respondents are not significantly more likely to own phones than their older counterparts, even though young adults say they use mobiles more heavily**. Ownership rates are significantly different across regions, ranging from 47 percent of respondents in the Northern Region to 82 percent of respondents in Greater Accra.
- **Of the 12 percent of survey respondents who say they do not use mobile phones at all, the most commonly cited barriers are—not owning a phone (77 percent of nonusers); not having access to a phone (31 percent); the high cost of handsets (26 percent); and the high cost of calling credits (13 percent)**.
- **A large proportion of mobile phone "early adopters" (those who acquired their first phone more than five years ago) are men under 40 with higher-than-average incomes and educational attainment, and strong English-language skills**. Both male and female early adopters are far heavier daily users of various phone functions than people who bought their first phone more recently. This likely indicates that phone owners become more comfortable with, and dependent, on multiple mobile applications over time.

The internet

- **The internet has a narrow user base, though not as narrow as is portrayed in some ICT statistics based on raw "connections per 100 people" data**. Fifteen percent of respondents say they have been online for any purpose in the last year; seven percent say they have logged on in the last week.
- **Although a lack of telecommunications infrastructure and cost factors clearly impede internet access for many in Ghana, another major challenge appears to be lack of knowledge about the web itself**. A third of respondents say they do not know what the internet is; half say they do not know how to use it.
- **The survey's user demographics show the bulk of web surfers are young urban men who are highly educated and relatively wealthy**. Again, the ability to read English with ease comes to the fore in this profile.
- **Of those who said they have used the internet, fewer than half say they went online for more than the most basic purposes** (email, news gathering and search functions) on a regular basis.
- **Less than 10 percent of mobile phone users say they have accessed or currently access the internet via their mobile**.

III. Staying Informed About Key Development Issues

Health

- **Word-of-mouth exchanges about health information are very common**. Seventy percent of survey respondents say they discuss health issues with others; more than two-thirds say these discussions take place regularly ("often" or "very often") with friends and family. They are less likely to discuss health issues with doctors, work colleagues or fellow students.
- **However, when asked about the trustworthiness of health information provided by various sources, doctors rated highly along with more-frequently consulted friends and family members**.
- **Rural residents are far more likely than urbanites to discuss health issues regularly with community elders, and nearly twice as likely as urban residents to discuss health regularly with traditional healers**. The extreme poor (those who reported incomes equivalent to $1 per day or less) are particularly likely to discuss health with community elders.
- **That doctors are not the most widely used source of information about health may be because they are not available to or affordable for the average Ghanaian. However, 84 percent of respondents say they generally have access to a doctor or other healthcare worker when they are sick or injured**, implying it is more difficult for them to discuss health topics in general with medical professionals than it is to get spot treatment for a particular ailment.

- **When respondents were asked where they received messages about health topics, radio and TV ranked as the highest information sources**. Less than 1 percent of respondents mentioned SMS services or the internet as a source for any of the health topics covered in the survey (malaria, HIV/AIDS, TB, polio, family planning, maternal and infant health, and diarrhea).
- **Respondents are relatively satisfied with the health information they receive**; more than 80 percent of all respondents say they are “somewhat” or “very” satisfied. Rural residents expressed somewhat lower satisfaction rates than urbanites for information on all of the topics, except diarrhea.
- **The study identified health opinion leaders as demographically distinctive**—mostly male, relatively well-off and well educated, and young to middle aged. The rural cohort has a notably higher number of health opinion leaders in the 60-plus age category. This may reflect a rural bias toward traditional systems of authority, which attribute more value to knowledge gained by senior members of the community.
- **Opinion leadership on health issues does not necessarily correspond to outstanding health**. A smaller percentage of opinion leaders than other respondents describe their health as “good” or “excellent”; a larger share of opinion leaders describe their health as “very bad.”

Case study—maternal and infant health information for young rural females

- **The survey identified a clear health information gap for young rural females**—a quarter of this target group said they had not received any information on maternal and infant health in the last year. The pattern cut across geographic locations.
- **Less than 10 percent of young rural females expressed any level of dissatisfaction with the information currently available to them about maternal and infant health**. This raises the question of how best to share this critical health information when there does not seem to be a natural demand for it. In other words, development groups must generate interest and involvement among a target group that does not appear to believe it has a great need for such information.
- Those who do get maternal and infant health information identified radio and doctors as the most common sources, but even these sources were limited in reach. Only around a third of respondents in this target group say they discuss health topics of any kind with a doctor or medical professional.
- **To reach young rural women, the most effective conduit is likely to be radio, particularly the stations this target group tends to tune to**—Adom, Peace, Obuoba, Nhyira and Radio Savannah. Educational programs or call-in shows on these stations in one or more Akan languages would probably be accessible to a majority of the target group.
- **The survey data also support the need for more outreach programs by doctors** (or at least by some type of health care professionals) to build upon the belief that doctors are widely trusted, but not widely engaged by young rural women.
- **The data suggest that development groups promoting maternal and infant health should make better use of mobile phones and TV**. Fifty percent of young rural women say they have access to a TV at home, but only 25 percent have received information about maternal and infant health from this source. Sixty-eight percent say they have access to a mobile phone at home, but none have obtained health information by phone.
- **However, given the groups' low level of education on average, SMS may not be the most effective medium** (only 18 percent of this group say they use SMS information from a service provider or other source at least once a month). TV programs and toll-free call-in services would likely be more accessible.

Personal finance

- **The data shows pronounced regional differences in access to and use of financial services**, with respondents in the remote Upper East and Northern regions registering the lowest levels of access and use. However, even where financial services appear widely available, half or more of respondents say they have not saved or borrowed money from formal or informal institutions. Thus, access is not the only factor determining whether people use services.

- Based on the answers of the survey respondents, **information about personal financial topics is not widely disseminated in Ghana**. Although approximately half of all respondents say they pay a great deal of attention to news about business and the economy, many say they rarely receive information about specific financial topics, such as saving at a bank.

- **People who have not used particular financial services are also less likely to have received information about those services recently** (or at all), suggesting a link between the availability of information and use patterns.
- **For those who do receive information about personal finance issues, the most common sources are radio and TV, followed by word-of-mouth from friends and family, bankers and colleagues**. Thirty seven percent of respondents say they discuss personal finance with their friends or family on a regular basis (responses of "often" or "very often").
- **Less than 1 percent of respondents mentioned the internet and SMS text services as a source for any financial topic**.
- Regarding the financial information filtering through to most Ghanaians, respondents indicate they mostly receive information about bank accounts compared to other financial topics mentioned in the survey.
- **Many respondents had not received information about mobile money services**—a hot topic in African development since their rapid growth in Kenya and elsewhere. **However, the recent introduction of such services in Ghana may have changed the situation since then**.
- **Low exposure to information about financial topics is matched by low levels of trust in and satisfaction with the information available**. The lowest levels of satisfaction are for information about informal methods of borrowing and saving.
- **Significantly, financial information supplied by experts (specifically, bankers) does not get a better trust rating** than information provided by friends and family or media outlets.
- **Rural residents are less likely than urban residents to view either banks or the financial information they provide as trustworthy**. The same was true of people with no formal education compared with respondents with any formal education.
- **Opinion leaders on financial topics are heavily male and relatively high on the income and education scales**; they tend to have more personal experience using financial services of various kinds. Urban opinion leaders are mostly young; in rural areas, a significant minority is over 60—

similar to health opinion leaders. Opinion leaders are also no more likely than other respondents to use the internet or SMS as news sources.

- **Many of the respondents in lower socio-economic strata say they do not use financial services** and have limited access to either formal or informal banking. Women and youth—who might be assumed to be low-use groups—are only slightly less likely than the national average to have access to financial services.

- **Radio, TV and word-of-mouth are the best ways to reach the population who do not use banks, but these conduits are currently underutilized for financial information**. Bankers are an important source of information about formal financial services for people who use them.

Agriculture

- **Extension agents and friends and family stand out as key sources of information for farmers about "practical" issues** (such as fertilization techniques and seed varieties). Radio is clearly the dominant media source for this type of information; NGOs barely register as an information source.

- Although information about practical farming issues appears to be readily available to most farmers, **many farmers say they are not getting any information about important "business" issues, such as market prices, crop subsidies and land property rights**. Survey respondents also expressed low levels of satisfaction for the amount of business information they receive.

- **The view of extension agents was varied in the survey**. Although they are cited as information sources by many farmers, the information they provide is not rated as any more trustworthy than information from other prominent sources. Even so, extension agents emerged as a possibly efficient conduit for connecting farmers with information sources about business issues.

- **Although information services for farmers based on mobile phones are a key element of current development work, the AudienceScapes survey results suggest (at least for the time being) the reach of such services is minimal**. Even though 64 percent of farmers say they have household access to a mobile phone, only four respondents said they have obtained information about agricultural topics in the survey from SMS. Only one respondent said he had learned about markets or prices in this way.

- **Respondents cite radio more frequently than any other media as a source of information about farming business issues. However, less than half of farmers say they have received information about business issues (such as markets, prices, legal issues or financing) from radio**. This suggests that radio programming aimed at giving farmers up-to-date business information, particularly in a call-in show format, would help fill this information gap.

- **Farming opinion leaders are a very small percentage of the total farming sample, although they appear to be well-informed individuals**. For example, opinion leaders are more than twice as likely as the general population to use newspapers and government officials to gather general news and information. Opinion leaders are also significantly more likely to mention extension agents, other farmers and farming supply vendors as sources of farming information.

Case study: Ghana's cocoa farmers

- **About a fifth of the farmers who participated in the AudienceScapes survey say they cultivate cocoa, Ghana's primary cash crop**.
- **These cocoa farmers appear to have better access to information on the whole than other types of crop farmers**. In particular, cocoa farmers are clearly better informed about agricultural markets, commodity prices, financial issues and legal issues.
- **Although cocoa farmers are on average less reliant on word-of-mouth as a source of general news, they are twice as likely as other farmers to say people come to them very often for news and information about farming (13 percent of cocoa farmers, compared to 6 percent of other farmers)**.
- **Cocoa farmers are significantly more likely than other crop farmers to say they have received information about business issues**, which likely reflects cocoa's status as a particularly active cash crop.
- **Cocoa farmers are also more likely to be satisfied with the information available to them about business topics**.

For more information, contact us at audiencescapes@intermedia.org.

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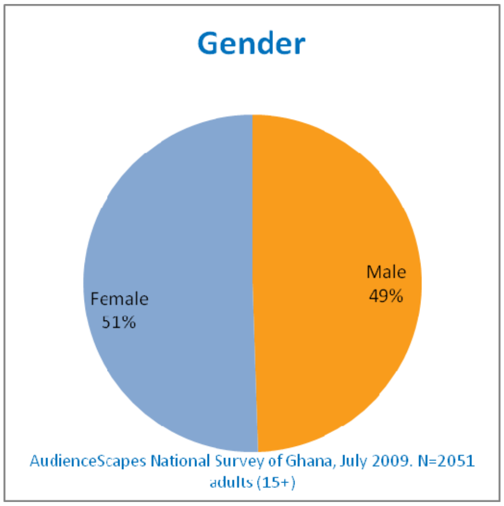
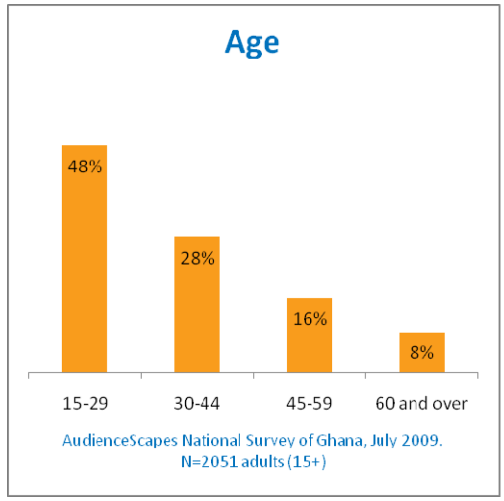
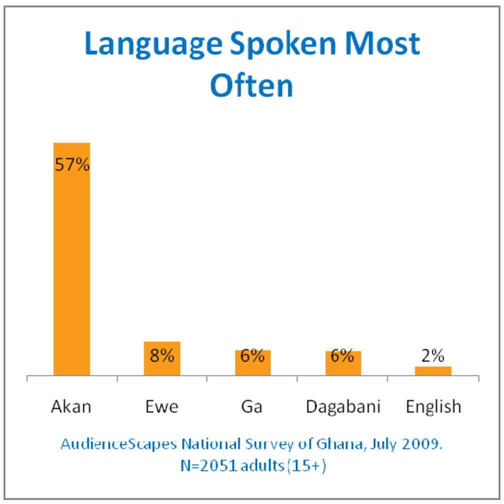
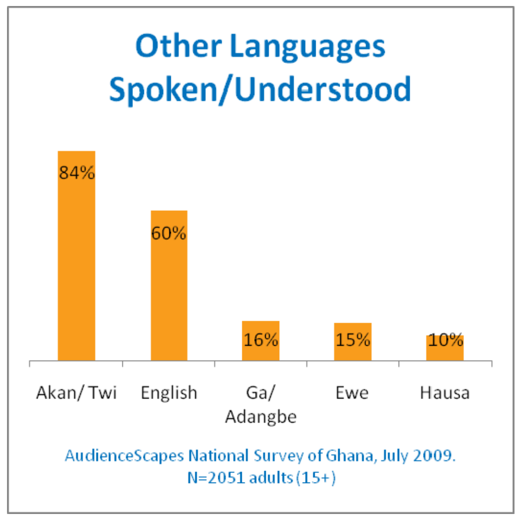
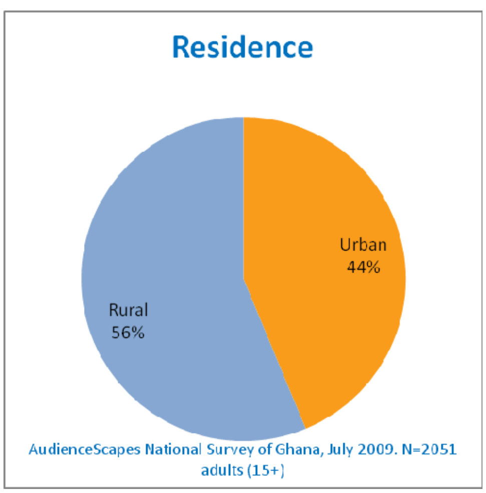
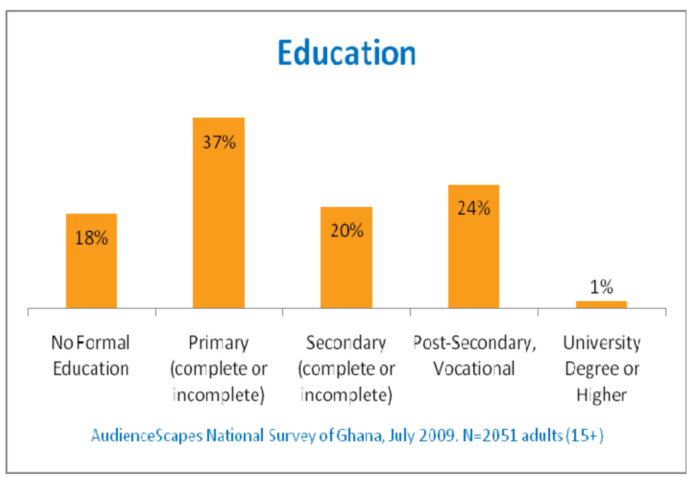

Gender
Male 49%
Female 51%
AudienceScapes National Survey of Ghana, July 2009. N=2051 adults (15+)

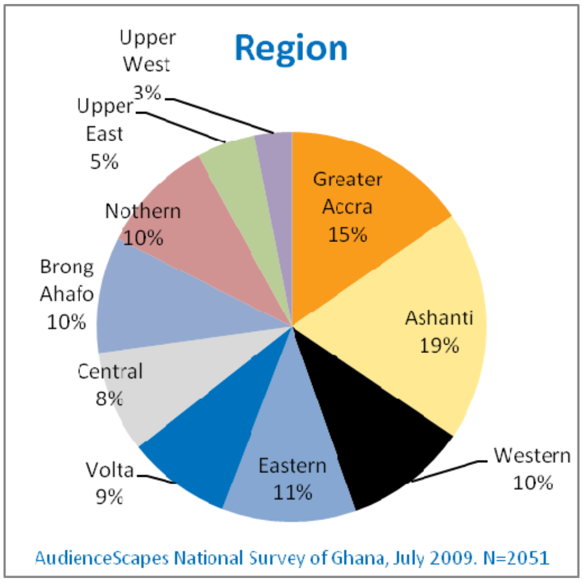

Age
48%
28%
16%
8%
15-29
30-44
45-59
60 and over
AudienceScapes National Survey of Ghana, July 2009. N=2051 adults (15+)

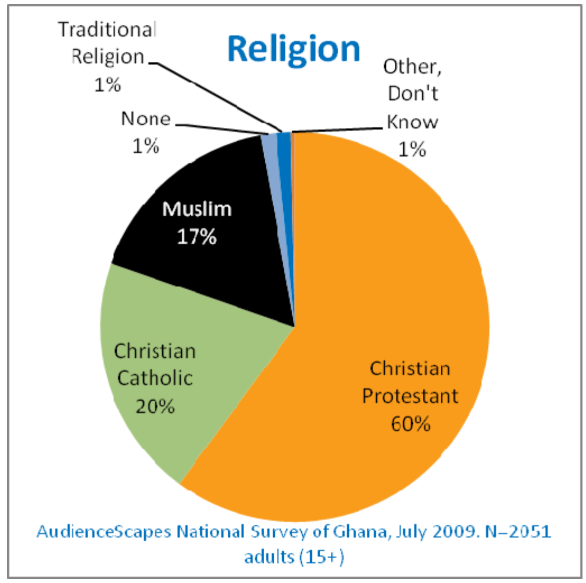

Language Spoken Most Often
57%
8%
6%
6%
2%
Akan
Ewe
Ga
Dagabani
English
AudienceScapes National Survey of Ghana, July 2009. N=2051 adults (15+)

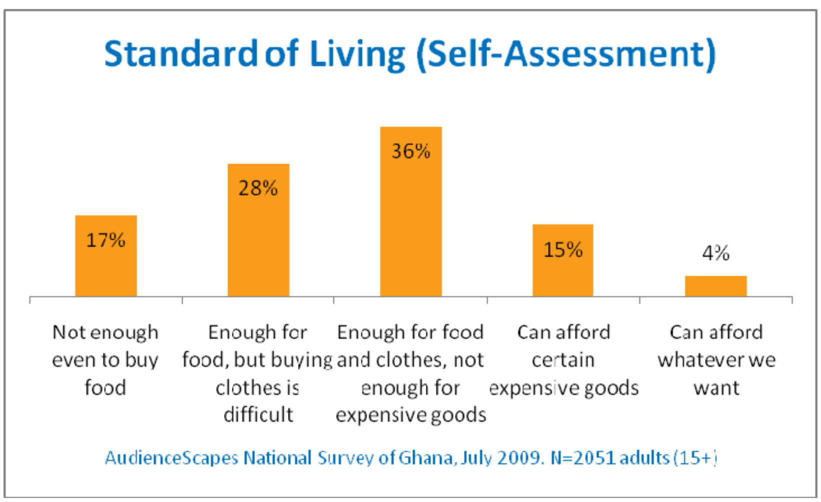

Other Languages Spoken/Understood
84%
60%
16%
15%
10%
Akan/ Twi
English
Ga/ Adangbe
Ewe
Hausa
AudienceScapes National Survey of Ghana, July 2009. N=2051 adults (15+)


Residence
Urban 44%
Rural 56%
AudienceScapes National Survey of Ghana, July 2009. N=2051 adults (15+)


Education
18%
37%
20%
24%
1%
No Formal Education
Primary (complete or incomplete)
Secondary (complete or incomplete)
Post-Secondary, Vocational
University Degree or Higher
AudienceScapes National Survey of Ghana, July 2009. N=2051 adults (15+)







(Note: The "Standard of Living—Self-Assessed" measure is designed to capture the relative economic well-being of households, based on their ability to afford basic and luxury goods. It was developed by InterMedia to address the concern that many survey respondents are hesitant or unable to provide accurate income measures. Respondents' self-descriptions of household status and wealth also reflect local living standards, whereas dollar-equivalent incomes can represent vastly different social status in different countries.)