I. Establishing the Development Communication Context in Kenya

This section of the report sets the scene for demographic parsing of the survey data by providing insight into popular perceptions of Kenya'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.

- **When survey respondents were asked about their level of trust in various institutions, government institutions trailed other types of institutions by wide margins**. Media and local NGOs received high trust ratings, which may be encouraging to development organizations that use frequently use media and NGOs as conduits for spreading development information.

- **When asked to rate the seriousness of a range of development topics, bread-and-butter issues such as jobs, poverty, general cost of living and corruption topped people's lists**. Food security was also widely cited as a serious issue, likely reflecting the harsh impact of a recent prolonged drought on the availability of food. However, political instability and interethnic disputes did not rank very high, despite recent events in Kenya.

- **Some prominent issues addressed by global development organizations (such as quality education or health care) were less frequently cited as serious problems**. Kenyans may consider such issues to be of secondary importance until more pressing challenges have been addressed. Far more rural than urban residents defined the availability of electricity and telecommunications as serious problems.

- **Media censorship did not register as a serious issue** among the general population or among most demographic subgroups (even among respondents in the North Eastern Region, where censorship was seen by independent observers as most problematic). This result comes despite recent government attempts to suppress some media coverage and add press restrictions.

- When asked about Kenya's recent progress toward the United Nations Millennium Development Goals, more than two-thirds of respondents said they perceived either "some" or "a lot of" progress in maternal health care and family planning, literacy, and primary education.

- **When asked about topics that attract their attention in traditional media (radio, TV and print), many respondents said they were eager to read stories about such topics as health, agriculture and the environment**, bolstering the chances that development groups involved in these areas will be able to engage target groups through the media. Rural residents said they pay a great deal of attention to news and information about agriculture.

II. Information Sources and Information Gathering

- **Among all media and ICT platforms that Kenyans have at their disposal, radio remains the most widely available**, reaching directly into more than 85 percent of Kenyan adults' homes. **Mobile phones are increasingly widespread but they have not yet reached the near-universal coverage of radio**. Fewer than half of all adults said they can watch TV in their homes, and other ICTs such as computers and MP3 players are available at home to only a tiny minority of Kenyans. Rural dwellers have significantly lower access than urban dwellers to most media and ICT platforms.

- **Many Kenyans are able to use media and ICTs even when these items are not available in their homes**—for example, by using those of friends or family living elsewhere, or by going to a public internet cafe or other public facility.

Word-of-Mouth Sources

- **Word-of-mouth sources (usually defined in the survey as either "friends and family" or "other people in the community") are roughly as important to survey respondents as are radio and television for staying informed**. **Though mobile phones have become more accessible for general use, they are not widely used for formal news collection via SMS news services**. Institutional sources, such as government officials or literature produced by public agencies, were also lower in the news and information rankings for the Kenyans surveyed.

- **Respondents in all demographic groups said they discussed news and information regularly with others, and their conversations cover a number of issues**. More than half of those surveyed said they discuss health, agriculture, and general news and information (including current events, and so on) with others on at least a monthly basis; discussion of financial issues lags slightly.

- **Information "hubs" or "opinion leaders" are more likely to be male and better educated, and to use media and ICT sources of information more frequently than other people do**. However, there was very little overlap between the respondents identified as opinion leaders in the various topics covered in the study (general news, health, agriculture and personal finance), suggesting that those who self-identified as opinion leaders were generally forthright about their areas of expertise.

- **Although most respondents said word-of-mouth sources are one of their most important and frequent sources of development information, they do not necessarily consider word-of-mouth sources to be particularly trustworthy providers of information**.

Rural-Urban Split

- **The survey highlighted a stark rural-urban split in access to/use of most media and ICTs**, which leaves rural dwellers more dependent on word-of-mouth sources as a regular ("weekly") news source. Rural access is limited by poor infrastructure and lower socioeconomic status (notably in terms of lower income and educational attainment), but not by lack of *interest* in getting news and information.

- **Controlling for education levels (that is, comparing only rural and urban respondents who have similar levels of education), many differences in urban and rural residents' frequency of media and ICT use narrow, or become statistically insignificant.**

- **Understanding Kenya's official languages of English and Kiswahili is key to using newspapers, government documents, the internet and SMS services, which are primarily available in those two languages**. While speaking and understanding Kiswahili is quite common, only 59 percent of rural respondents said they can speak and understand English, compared to 80 percent of those in urban areas.

The Gender Gap in Access

- Women were more likely than men to say they have had no formal schooling (14 percent of women versus 8 percent of men), while women were half as likely as men to have earned a university degree.

- **In general, women reported lower access to ICTs than men did, even at the household level**. Since selection of the survey participants was randomized down to the individual level, one would not expect to see differences between men and women in terms of their household access. A possible explanation is that women did not report having an item at home if they did not have personal access to it or were not allowed to use it.

- **Women use word-of-mouth sources as much as men do**. **In fact, friends and family are women's most-cited sources for news and information "in the last week," narrowly beating radio**. Women were significantly less likely to have received news and information from newspapers, and only about half as likely as men to have received news and information from the internet in the last week. Thus, personal sources of information need to play a relatively larger role in any communication or outreach strategy aimed at women than in such a strategy aimed at men.

- However, it is not clear whether such personal sources will necessarily only be women speaking to women. **The survey data indicate that women are less active than men as *sources* of either news and information, or of advice and opinions**.

- **Women also reported that *fewer* people rely on them for opinions or advice on the news**: 9 percent say that no one does (compared to 7 percent of men); with another 71 percent saying fewer than five people look for their opinions (compared to 64 percent of men).

Traditional Media Use Trends

- **Traditional media (radio, television and print) remain more widely used for news and information than internet and mobile phone platforms**. However, in such a rapidly changing technological environment, this trend may not continue for long.

- **Nearly all Kenyans are radio listeners**, and nearly all of these listeners said they use this medium as a regular source of news and information (as opposed to listening strictly for entertainment): 89 percent of Kenyan adults get news and information from the radio on at least a weekly basis.

- **Radio was considered a very important source of information by more than half of radio listeners surveyed on every topic mentioned** (current events, health, agriculture, business/finance, education, and government). The news and information provided by radio were also deemed trustworthy by more than 95 percent of all respondents.

- **When asked to list their top three radio stations for news and information, notable demographic differences emerged**. For example, Easy/Nation (a private English-language station run by the Nation Media Group) was mentioned more often than Inooro (a private Kikuyu-language FM station run by media group Royal Media Services) by men, but Inooro was more popular than Easy/Nation among women. Youth (15 to 30) have preferences that are very different from those of their elders'.

- **Many of the stations' audiences are regionally focused**, reflecting both the reach of their broadcast signals and the appeal of their unique combinations of language and content.

- **Community radio stations were rarely mentioned** among top three stations used to access news and information.

- **Television sets are not ubiquitous in Kenya**. Even among the 1,152 respondents (58 percent of the sample) who said they had watched television in the last week, about a third said they do not have a TV at home. Of those who do have a TV at home, nearly all received six channels or fewer on their television set. Virtually all television owners reported using antennas.

- **When TV viewers were asked to list stations they watch most frequently, four stations dominated**, in descending order: Citizen TV, Kenya Broadcasting Corporation (KBC), Kenya Television Network (KTN) and Nation TV (NTV). Viewing rates and preferences vary widely across regions.

- **Of those who said they do not watch TV, 65 percent are female and 87 percent are rural**. Eighty-seven percent said it was because they do not own a TV, while nearly one quarter pointed to problems with electricity supply. (Respondents were able to choose more than one reason for not having watched TV in the last year.)

- **Fewer than half of all respondents said they receive power from the main national electricity grid**; even having a source of electricity at home does not guarantee a constant, reliable supply, however.

- **Viewers overwhelmingly expressed trust in the news and information they get from TV**, with fewer than 5 percent saying that TV reports are untrustworthy. Sixty-three percent of urban respondents said they watch TV on a daily basis, compared to only 25 percent of rural respondents; the daily figure is 87 percent for the Nairobi region alone.

- **Thirty-seven percent of respondents said they had not read a newspaper within the last year**; when asked why, many cited cost or the inability to read or understand newspapers. About one quarter of nonreaders said that they are simply not interested in getting news and information from print media. Newspapers are fairly widely read in the major urban centers

- Regular (weekly) newspaper readers in the survey were 64 percent male, 51 percent urban, 79 percent “middle income” and 99 percent with some form of formal education (of which 83 percent had some secondary school or more).

- The ranking of top newspapers, derived from the number of mentions of each paper in an open-ended survey question, place the ***Daily Nation***, the ***East Africa Standard*** and the ***Taifa Leo*** at the top. There was little demographic differentiation, but readership rates vary across regions.

- **Levels of trust in the information provided by print media were somewhat lower than trust in radio and television**.

Mobile Phones and SMS Text Messaging

- **The AudienceScapes survey results corroborate supply-side data showing widespread mobile phone use in Kenya**, even among relatively isolated or disadvantaged demographic groups and among those who do not own their own phones. **Ninety percent of those surveyed said they had used a mobile phone for some purpose within the last year**.

- **Despite widespread access to phones for basic uses such as voice calls, some of the more innovative uses of mobile phones have been less widely adopted**.

- **Few respondents said they used phones as a platform for getting news updates from SMS-based services**. Even among those who knew enough about SMS news services to offer an opinion, they expressed relatively low levels of trust in such services.

- **Literacy is a key obstacle to using SMS**. Although the majority of mobile phone users said that they can read English easily, those who cannot do so were much less likely to say they had used SMS recently.

- **Use of mobile phones for financial transactions has become routine (at least once a week) for about one quarter of mobile phone users in Kenya**. More than half of those surveyed said they had used a mobile phone for financial transactions at some time; of those who had, virtually all had sent or received money within Kenya, but fewer than 20 percent had paid bills, managed savings, or arranged loans or credits using a mobile phone.

- **Phone sharing is common, meaning that mobile phone use is not restricted to Kenyans who own them or have household access to one**. Half of all phone owners said they lend their phone to other people at least once a month.

- **The ownership rate, at 60 percent of those surveyed nationally, varies substantially by demographic group**. Personal phone ownership was claimed by 71 percent of urban respondents versus 55 percent of rural respondents. The gender breakdown showed 55 percent of women compared to 67 percent of men. Meanwhile, young adults (20 to 35) led ownership rates among various age categories. The most dramatic demographic dividing lines emerge among people with different levels of education, which serves as a convenient proxy in the data for income and other socioeconomic status indicators.

- **Three quarters of mobile phone owners surveyed said they purchased their first phone within the last five years**. "Early adopters"—those who purchased their first phone more than five years ago—tend to have stronger representation among males, those 30 to 49, the better educated, the wealthier and urbanites. Early adopters use their phones more intensively than those who bought phones more recently, and men on average use mobile phones more intensively than women do.

- **For the 10 percent of those surveyed who still are not using mobile phones, the most commonly cited reasons were not owning or having access to a phone**. About one quarter of nonusers said one reason they do not use mobile phones is that phones are too expensive.

- **Logically, respondents who own a phone tend to use every phone function much more intensively than do those who rely on others' phones**. Substantial differences in use trends suggest that ownership (rather than access of any kind) may be a more appropriate measure of the real development impact of cell phones.

- **While respondents gave mobiles high marks for ease of use and their utility in conducting business, price appears to be a concern, as does the ability to fix a phone when it does not function properly**. The implication is that mobile phone-based development initiatives should account for possible constraints imposed by the expense of owning one, weak phone signals in some locations and the challenge of fixing broken phones.

The Internet

- **Only about 20 percent of respondents said they had used the internet for any purpose in the last year, and even fewer said that they use the internet regularly** (14 percent of respondents said they had been online in the last week). Regular users are predominantly young, male, relatively wealthy and relatively well educated compared to the population as a whole.

- **Eleven percent of survey respondents said they have internet access of some kind at home, though only 5 percent said they have a working computer at home**. The statistical gap may reflect some internet users' ability to access the internet at home on mobile phones, given that many mobile phone users said they were able to do so.

- **Barriers to internet use mainly reflect limitations of Kenya's telecommunications infrastructure. However, lack of knowledge about the web also featured in survey responses**. More than half of those who said they had not used the internet in the last year attributed this to not knowing how to use it, while 41 percent of nonusers (representing about a third of all Kenyan adults) said they do not know what the internet is. That said, relatively high levels of internet awareness among younger respondents may bode well for the future internet use trend.

- Even if the internet is better understood by most people, many potential new users may run up against the same barriers that limit Kenyans' access to television: gaps in household technology ownership (of computers, in this case, rather than TV sets) and electricity supply constraints. Furthermore, literacy will play a key role in internet use.

III. Staying Informed About Key Development Issues

Health

- **The AudienceScapes survey assessed the reach of information about seven key public health issues (malaria, family planning, diarrhea, maternal and infant health, polio, HIV/AIDS, tuberculosis) by asking respondents when they last heard a message or received information about each health topic. Information about HIV/AIDS had reached almost 90 percent of respondents within the last month, while exposure to messages about maternal and infant health, diarrheal diseases and polio lagged the group.**

- **Rural residents were much less informed about every health issue, with the biggest gaps showing in information about family planning, maternal and infant health, and tuberculosis.**

- **Health topic messages seemed to be passing through a range of sources, with radio, word-of-mouth, doctors and television emerging as the most common sources**. Very few respondents said they obtained information about any of these topics from the internet or SMS services.

- **The level of use of various sources did not always correspond to each one's perceived reputation for delivering trustworthy information**. Notably, word-of-mouth information about health appeared to be heavily used but was not considered particularly trustworthy.

- **Medical doctors were defined as a highly trusted source for health information, but were not widely used for that purpose**. This may have been because medical doctors are not easily accessible for basic information gathering, though 86 percent of all those surveyed said they generally have access to a doctor or other health care worker when they are sick or injured (and 94 percent said they have access to a hospital, health center or health clinic).

- **Respondents' levels of satisfaction with the health information currently available to them varied by topic**, with information about HIV/AIDS and malaria being most satisfactory, and information about maternal and infant health being least satisfactory.

- **Seven percent of respondents identified themselves as health "opinion leaders"**. Their average demographic profile is quite similar to that of the entire sample, although rural opinion leaders are more likely to be male, and all opinion leaders are on average slightly better educated and wealthier than the whole sample.

- **Sixty-one percent of opinion leaders said they are in "excellent" or "very good" health, compared to 52 percent of the whole sample who chose these responses**. These health information elites were also more likely to say that they have the final word in their households about a variety of health decisions. They are also more active gatherers of information—for example, they use newspapers regularly at a much higher rate than did the whole sample.

- **Health opinion leaders also reported higher rates of word-of-mouth sourcing of news and information than the national average**, confirming their status as personal information hubs, but suggesting they may not always be introducing new information as much as they are helping to interpret information that is already being shared.

Case Study: Targeting Malaria Prevention Education to Rural Women Under 30

- **Demographically, young rural women are more likely than the average respondent to face poverty; 40 percent said their households struggle to buy basic necessities. They are also less likely to have gone beyond primary school and to be working. Thus, malaria-prevention messages should be designed to correspond to this group's limited education and resources**.
- About three quarters of the target group had heard news or information about malaria in the last month, mainly from radio, friends and family, and medical doctors. **Malaria information provided by doctors received the highest trust rating in comparison to other sources, but only a third of young rural women said they had received malaria information from doctors at any time in the past**.
- **Fewer than a fifth of young rural women said they make decisions about their families' health care on their own**. Malaria campaigns targeted at this group might need to include tips on talking to other household members about malaria prevention or might need to consider the broader family information environment.
- **Messages delivered in Kiswahili are likely to be understood by virtually all of the target group**. Radio stands out as the most efficient means of reaching a wide audience.

Case Study: Improving HIV/AIDS Education for Urban Men Under 30

- This target group is relatively well-off in terms of household income, educational opportunities and healthcare access. Though slightly fewer than half said they work (either part or full time), most of the rest said they are students. Virtually all understand both Kiswahili and English.
- **Eighty percent of this group said they received information about HIV/AIDS within the last week, and almost all said they were satisfied with the information available to them on this topic**. They also said they help to spread information about health topics to other people, mostly discussing health with friends and family, and with colleagues.
- **Very few young urban men are receiving messages about HIV/AIDS via SMS or online, even though a large number have regular access to these sources**. In addition, fewer than a fifth of the target group said they had received HIV/AIDS information from a doctor, although trust in doctors was high.

Case Study: Discussing Tuberculosis with the Urban Poor

- The urban poor present a communication challenge because they tend to be resource poor and to lack education. That said, about half of urban poor respondents can be described as "working poor," engaged in sales/retail jobs, agriculture (despite their urban homes), or service industries.

- **Although three quarters said they were satisfied with the information available to them about tuberculosis (TB) , about a third said they had not heard anything about TB in the last month**. The most common sources of information about TB were radio and friends and family; medical doctors were only cited by 18 percent of the target group—the same percent as those that receive TB information from TV.

- **This target group is receiving less information about TB than about other health topics mentioned in the survey**. Thus it may be useful to incorporate TB messages into successful existing health campaigns covering other topics. Workplace education is also a possible focus. Schools-based programs are less likely to start a discussion about TB among this target group.

- **SMS messaging also has untapped potential**—not just for providing education about TB, but also for providing an opportunity for the urban poor to ask questions or receive reminders and tips for adhering to a TB treatment regimen.

Personal Finance

- **It is perhaps not surprising that Kenyans seem to be most exposed to information about mobile money services in comparison to other financial topics covered in the survey** (money transfers, bank accounts, formal saving and borrowing, informal saving and borrowing, government subsidies, or pensions).

- **Low levels of satisfaction with information available on most finance topics indicates a quality or quantity gap** between the information they would like to get on these topics and the information they currently access, and highlights a potential area for intervention by development organizations and financial product vendors to close this gap.

- **Fewer than 10 percent of those surveyed said they had received information on a financial topic via mobile phone** (specifically, via SMS services), including information about mobile financial services. Presumably, many mobile phone users would be reachable via SMS—though they might not be willing to pay for information to be delivered that way.

- **While radio is by far the most common source of general information about personal finance topics, word-of-mouth also plays a prominent role and should be integrated into any financial communication program**. More specifically, word-of-mouth sources were dominated by friends and family members more than by financial experts.

- **Trust in various sources of financial information varied widely**; the majority of respondents characterized financial information provided by friends and family as only somewhat trustworthy, yet they are the most widely cited source of information about informal savings/borrowing and the second-most-widely cited source for other financial topics. Development organizations might try to improve the situation by communicating directly with opinion leaders to ensure that those hubs of word-of-mouth information are providing the same information as are more-trusted sources such as radio, TV and financial experts.

- **The survey data also point to a correlation between the degree of information gathering on financial topics and the degree of use of financial services**. For example, those who recently had obtained information about bank accounts were far more likely to have a bank account of their own compared to those who had last obtained information less recently or not at all.

- **A small group of respondents (106) identified themselves as hubs of communication for information on finance**. These opinion leaders tend to have significantly higher average levels of education than does the total sample. Given that financial professionals are not common sources of financial information, these people may be filling the knowledge gap by turning to experienced local financial consumers.

Case Study: Who is Using Mobile Money?

- **The snapshot taken in the AudienceScapes survey provides reasons for optimism in the development community about reaching the unbanked through mobile money services: many of the survey respondents who said they use mobile money are the relatively poor, rural dwellers or otherwise outside typical centers of formal banking**.

- **Slightly more than half of all respondents said they had used a mobile phone at some point for money or financial business** (e.g., to send or receive money, pay bills and so on). Most, however, use mobile money for a single reason: to send or receive money transfers.

- **Slightly more than half of self-identified mobile money users in the survey live in rural areas, with users in every region of Kenya**. The vast majority of those who had used mobile money also said they have a mobile phone available in their household.

- Fifty-seven percent of mobile money users described their economic status as having some disposable income ("enough money for food and clothes and can save a bit"), with roughly equal numbers above and below that economic level.

- **Seven percent of mobile money users said their family did not have enough money even for food**: all of them had sent or (more likely) received money transfers, but a handful reported having managed savings by mobile device.

- **Users of mobile money services are, on average, more educated than nonusers**: 71 percent of users have at least some secondary schooling, 26 percent have primary schooling, and 3 percent have no formal education. **Eighty-two percent of mobile money users said they speak and understand English—far more than the 48 percent of other respondents**.
- **Among nonusers of mobile money services, about one-third said they do not have access to a phone, one quarter said they do not need to use these services and one quarter said they prefer to conduct such transactions in person**.
- **There are sharply different mobile money take-up rates among different demographic segments**, particularly among people with different levels of education or people living in different regions. The mobile money use gap between men and women is statistically significant but not large.
- **Mobile money take-up rose substantially alongside income**. More noteworthy—and perhaps encouraging to those who hope mobile money will provide new opportunities to the poor—is that 35 percent of people in the survey who said they were living on less than the equivalent of $1 per day reported using mobile money services at some time.
- **Forty-two percent of the respondents without access to a bank, a banking cooperative or a savings and credit cooperative (sacco) said that they had used a mobile phone for financial transactions**. However, these people typically have only used phones for sending or receiving money transfers; fewer than 10 percent reported using any other mobile financial service.

Agriculture

- **The survey data indicate a need to bolster efforts to get more farming "business" information into the hands of the Kenyan farmers**. Information about the business side of agriculture (market information, farm loans, subsidies, legal issues) appears to be largely unsatisfactory in quantity, quality or both.
- **SMS services and the internet did not register as a source of either "practical" (irrigation, fertilizers, and so on) or business information on *any* topic for more than 1 percent of farmers surveyed**. The bulk of their practical information comes via radio, word-of-mouth sources (specifically, friends, family and other farmers) and agricultural extension agents.
- **Mobile-based farm information services are thus starting from a very low user base and a broad lack of familiarity with the concept**; other potential conduits for the delivery and sharing of agricultural information may be more effective in the near term, and should not be given short shrift in the drive to use newer ICTs.

- **The data indicate stark regional differences in the way crop farmers currently obtain essential practical information**. For example, radio is the top source for fertilizer information across the country, but the range of other top sources for fertilizer varied substantially by region. Meanwhile, practical information about livestock farming appears to travel through somewhat different channels than information about crops, with veterinarians and NGOs playing more-prominent roles.

- **When asked in the survey whether they were satisfied with existing information about the business aspects of agriculture, many respondents simply said that they cannot judge because they receive no information about these topics at all**. Development groups thus face the dual challenge of making such information readily available and making it clear to farmers why they are making it available and how it might be beneficial, even though the farmers may not perceive a need for it.

- **Based on trust questions about sources of farm information, it appears that messages to rural populations about farming issues are likely to be delivered most credibly via radio, trusted networks of farmers, local agricultural extension agents and local farmers' organizations**. Conversely, TV, print media, the internet, SMS services, and posters and billboards appear to be weaker information conduits when viewed through the trust lens.

- **Relatively low levels of expressed trust in SMS services stand out in the survey**, though they may understate trust in such information, given that the majority of respondents answered "Don't know" to this particular trust question.

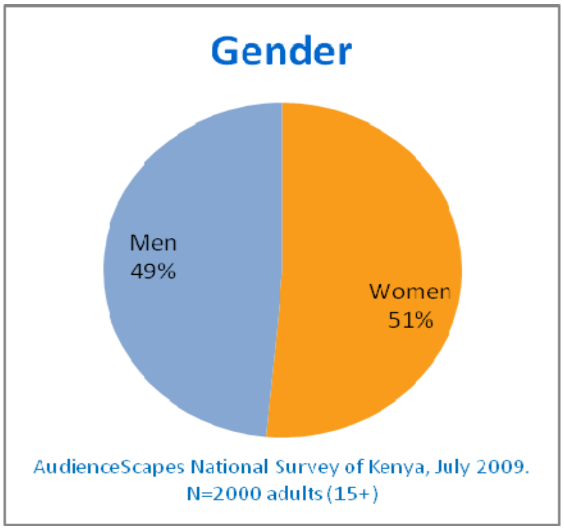
- **Development organizations seeking agricultural opinion leaders as implementing partners may be hard-pressed to find them**; only 89 respondents, or 4 percent of the whole weighted sample, matched this description. That said, they seem to be particularly well-informed individuals and are thus well placed to be hubs of information for their communities.

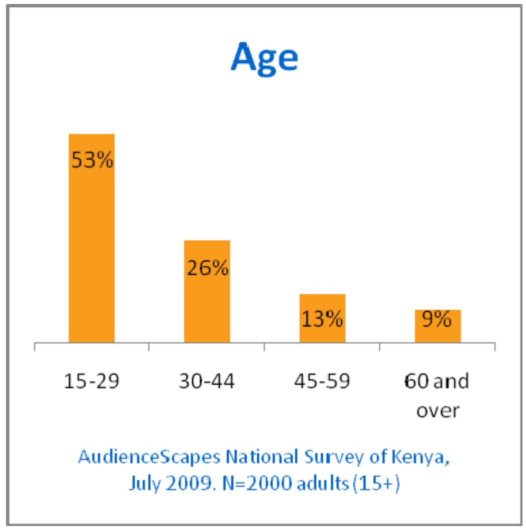
Case Study: Livestock Information on the Airwaves for Cattle Owners

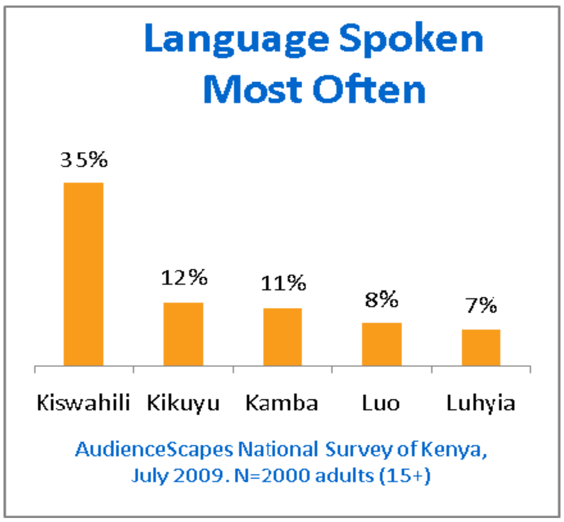
- **Seventy-two percent of livestock owners (representing 38 percent of all respondents) said they own cattle**. Most of these cattle farmers appear to operate at a very small scale—almost 90 percent had 10 animals or fewer (the median cattle farmer owned three cows).

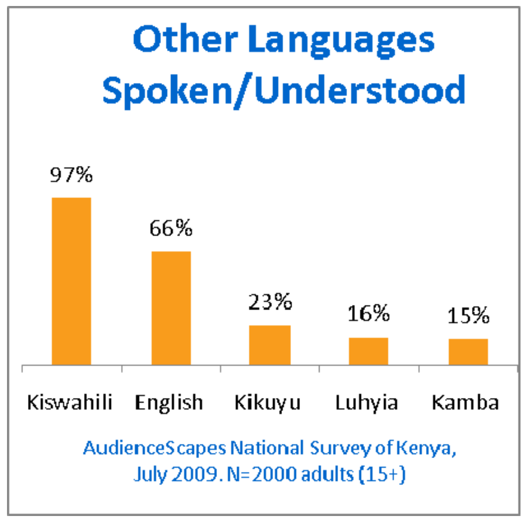
- **Cattle farmers' most widely cited sources of livestock information are radio, veterinarians, and friends or family. NGOs and extension agents also reach about a fifth of cattle owners with information about these topics**. Concerning radio, programming aimed at cattle farmers nationally would stand a better chance of reaching its audience using Radio Citizen, KBC Kiswahili and Kass FM than by using other stations.

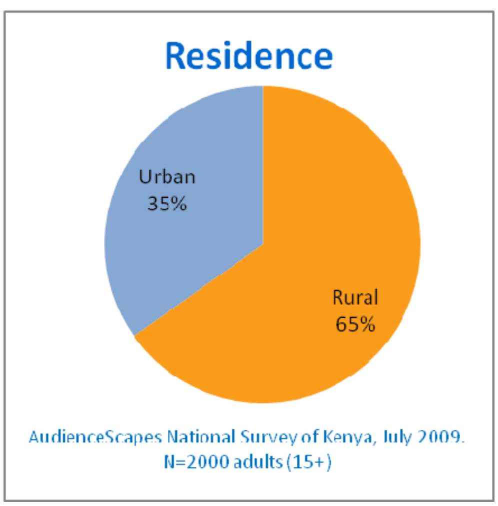
Demographic Profile of Survey Respondents

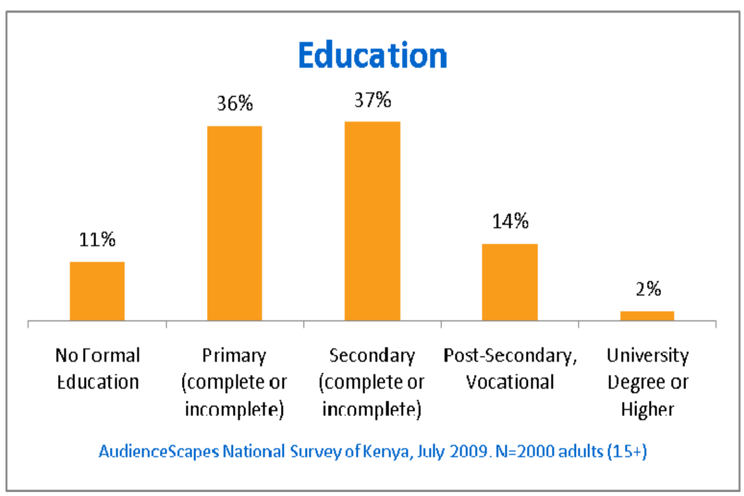












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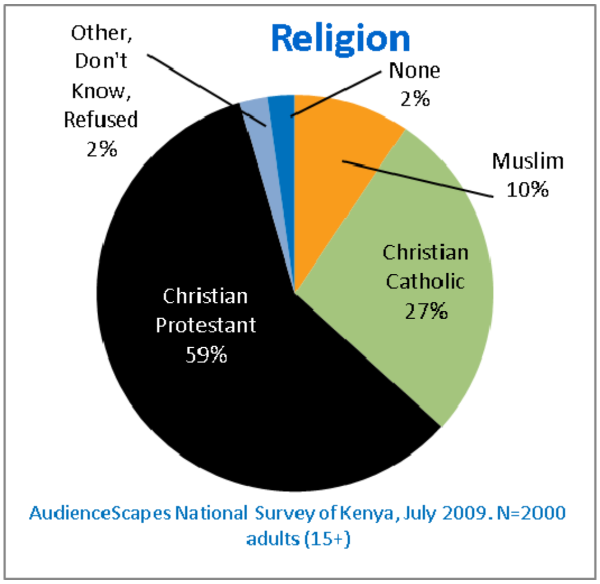

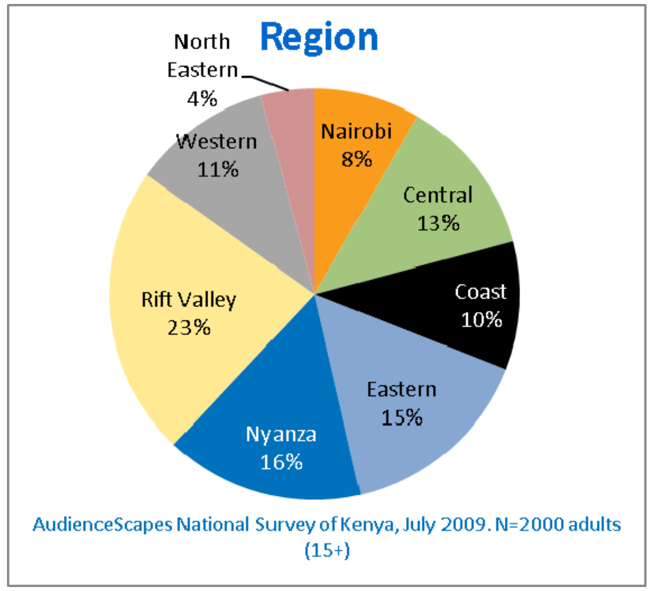

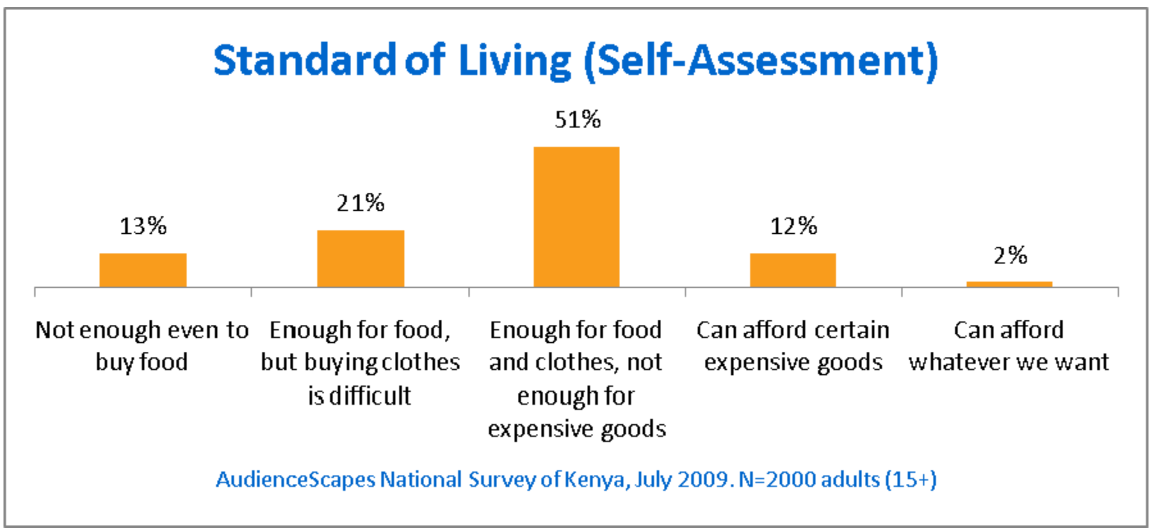

(Note: The "Standard of Living—Self-Assessed" measure is designed to capture the relative economic well-being of households, based on their ability to afford basic and luxury goods. It was developed by InterMedia to address the concern that many survey respondents are hesitant or unable to provide accurate 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.)

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