

# COMMUNICATION IN SIERRA LEONE: AN ANALYSIS OF MEDIA AND MOBILE AUDIENCES

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# Executive summary

Since the end of the war in 2002, the media and communication sector in Sierra Leone has significantly diversified and decentralised. This period has seen the growth of emerging communication platforms such as mobile phones and the internet, and a proliferation of radio and TV stations. In order to obtain up-to-date, accurate information about how adults use and access media and mobile phones, BBC Media Action conducted a nationally representative survey of 2,500 Sierra Leoneans in late 2015.<sup>1</sup>

The survey indicates that radio remains the most widely accessed broadcast platform in Sierra Leone. In all, eight out of 10 (81%) Sierra Leoneans have access to radio, and 47% listen to it daily. Radio listenership is fractured, however, with no single station able to reach a national audience. Around 50 radio stations are currently broadcasting, with many of these having limited, local broadcast reach. This is reflected in patterns of listenership, with different stations popular in different parts of the country. Overall in the country, no station reaches more than one-third of adult Sierra Leoneans. Reaching a national audience through radio, therefore, requires working with a large number of broadcast partners. In contrast to radio access, just under half of Sierra Leoneans (45%) can access TV or DVD content and 13% can access newspapers.

Access to mobile phones is high, now achieving a similar reach to radio: 83% of people report having access to a mobile phone. There is significant potential for leveraging this reach and the opportunity offered by 2G and 3G mobile phone platforms as a means of distributing media content to audiences. More than half of mobile phone owners (52%) have a basic feature phone

without internet or app capability. It should also be noted that a quarter of mobile phone users need help to operate it to make calls or send texts, especially women, older people or those from rural areas. Usage of mobile phones is often limited to basic tasks. Almost all mobile phone users (99%) say that they use their phones to make calls, but only around a third (33%) use them to send text messages and just 13% use social messaging services such as Facebook messenger and WhatsApp.

Use of social messaging in Sierra Leone is a growing phenomenon but still small – overall only 13% of those with phones report using them for social messaging. Social messaging use is also limited to specific demographic groups – notably young people (those aged 15–24) and those in Western Area. In contrast, young people are the group least likely to listen to the radio (39% of those aged 15–24 listen each day, compared to 47% of the population as a whole). Usage of Facebook Messenger was mentioned by 2% of the population, and the same proportion report using WhatsApp. Internet usage is only slightly higher than social messaging, at 16%, and is similarly dominated by young people and those in Western Area.

The two most widely accessed media platforms, radio and mobile phones, are almost equally used by men and women and by those in urban and rural areas. In contrast, TV, newspapers and the internet show striking differences in terms of gender – men have consistently higher access to media than women – and location – those in urban areas have higher access than those in rural areas.

# Introduction

Sierra Leone has seen notable changes to the mobile and media landscape, but accurate, up-to-date, nationally representative data about how people use and access media and mobile phones has not been publicly available for some years. BBC Media Action recognised the need for such data and the importance of this information to underpin any communication initiative targeting audiences in Sierra Leone. To improve our understanding of this landscape, BBC Media Action, funded by the Paul G. Allen Family Foundation, conducted a nationally representative survey in 2015.

This report is largely based on the results of the survey. It first gives an overview of access to various media and communication platforms, and the ways in which different groups use them, before giving an overview of information needs and describing some examples of audience profiles. Further data is also available in the tables included in Annex I.

# Chapter I

## Overview of traditional media in Sierra Leone

Access to traditional media – radio, TV and print – varies greatly in Sierra Leone: the proportion of adults with access to each platform is 81%, 45% and 13%, respectively. Access to media is also determined by geographic location and gender (see Figure 1).

The number of radio stations in the country has dramatically increased in recent times, from eight at the turn of the century (six of which were state-owned) to more than 90 stations in 2015. Despite the rapid growth in the sector, many stations face operational difficulties. Only about 50 of these stations are currently functioning and many operate with small transmitters and limited broadcast reach.

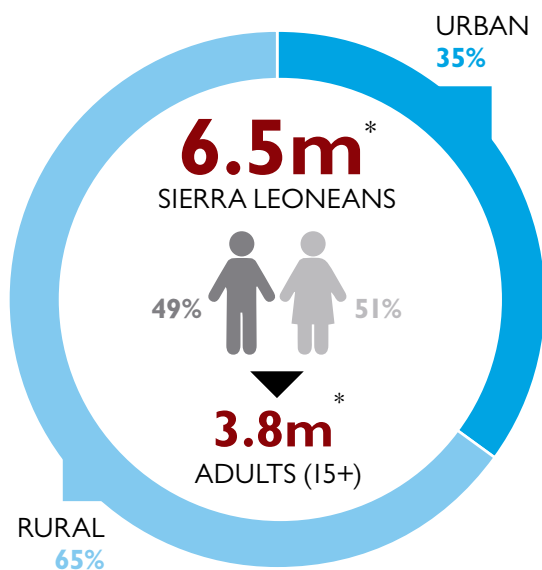
TV has been broadcast in Sierra Leone since 1963, with five local channels registered in 2015.<sup>2</sup> International satellite channels are also available on a subscription basis through Digital Satellite Television Service (DSTV) from South Africa, although the costs associated with this are high.<sup>3</sup>

There is a history of print journalism in Sierra Leone dating back more than 200 years, with the Sierra Leonean Gazette initially founded in 1801. Despite this, newspapers have not gained a mass audience. Readership is also mostly male – 71% of those who access newspapers are men – and urban – 82% of readers live in urban areas. This can partly be attributed to traditionally low levels of literacy among the population; in this survey 38% of respondents were literate. Newspapers are also not broadly distributed throughout the country and most of the 40 or so newspapers that are in print only have relatively small print runs, no higher than the thousands.<sup>4</sup>

Of the three traditional media platforms, radio has the largest reach and also the greatest potential to reach an equal number of women and people living in rural areas. TV reaches a smaller proportion of each of these groups than radio, and newspapers an even smaller proportion.

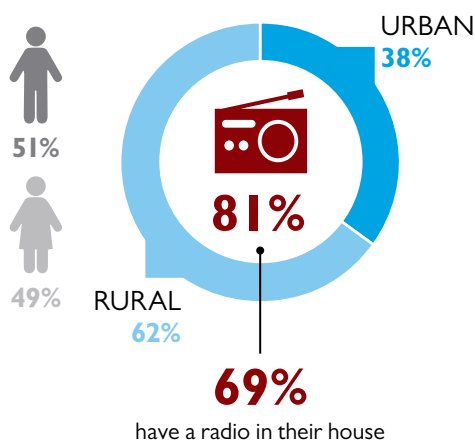
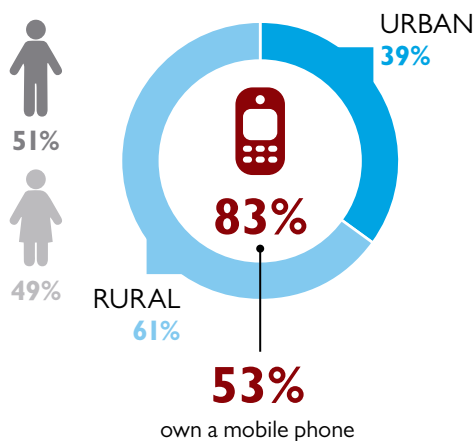
The remainder of this section looks in more detail at how the different traditional media platforms are accessed and used by different audiences.

Figure I: Overview of access and ownership figures for traditional and new media<sup>5</sup>

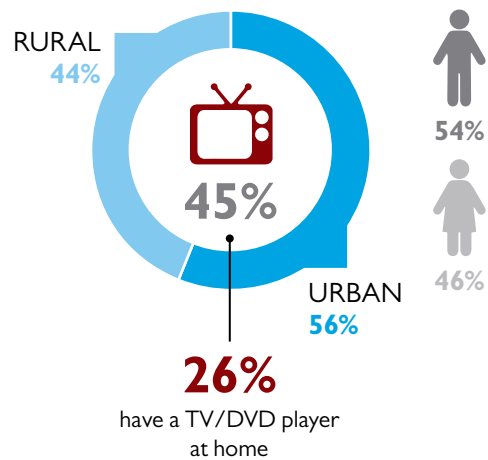


\*Source: Population Reference Bureau, 2015.

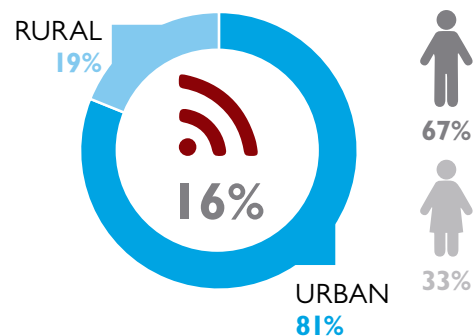
The majority of adults have access to mobile phones and radio



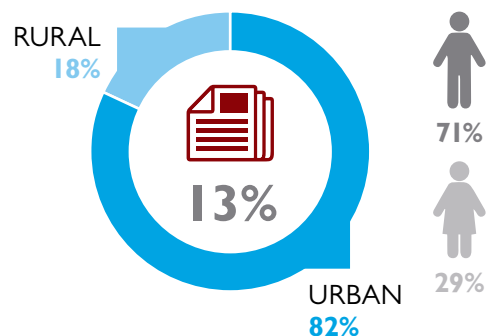
TV viewing is more widespread in urban than in rural areas



Social media and internet users are younger and mostly urban



Newspapers are read largely by men and people living in urban areas





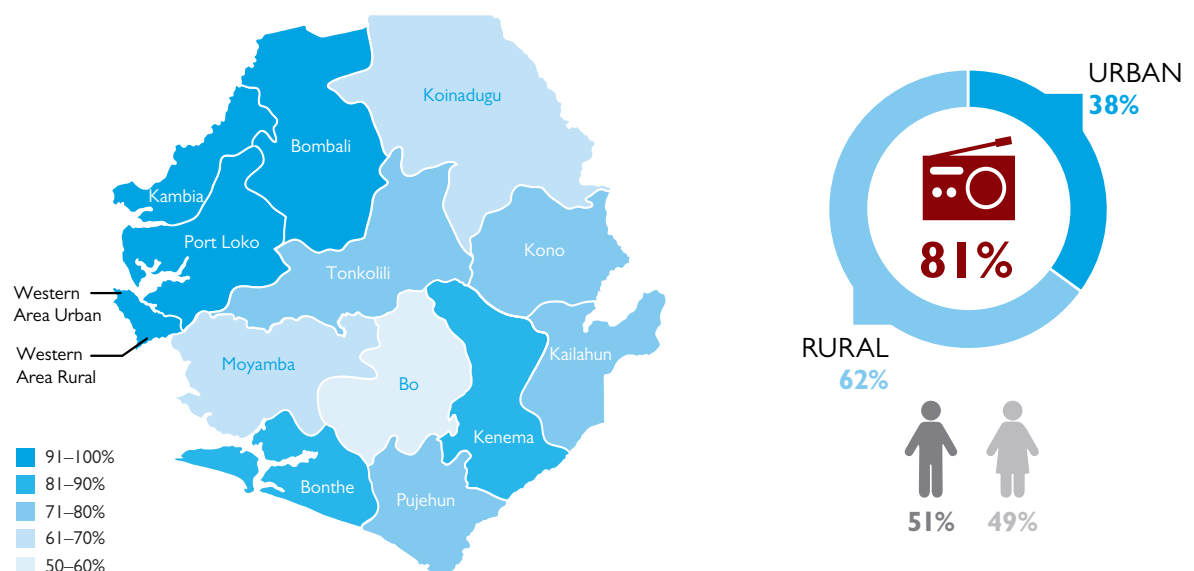
## Radio

### Radio continues to reach a wide audience

While the popularity of radio has been maintained, the radio landscape has changed notably. In 2000 only eight radio stations existed; this has since grown to about 90 radio stations registered with the Independent Media Commission in 2015, of which it is thought that over 50 operate on a regular basis.<sup>6</sup> Compared to 2000, when six of the eight stations were state-owned, of the 50 radio stations operating in 2015 some are associated with tertiary or religious institutions, some are commercially owned, some supported by non-governmental organisations and others are locally owned and led. The growth of radio stations in Sierra Leone has been supported partly by international non-governmental organisations that invested in community-based radio as part of the reconciliation and peace-building process.<sup>7</sup> The majority of stations operate with low-level transmitters, which limits them to broadcasting over a relatively small area.<sup>8</sup>

In 2015 radio is still the most accessible broadcast platform in the country. Counting those who can listen to the radio outside their homes, eight out of 10 (81%) adult Sierra Leoneans have access to radio. Access rates vary, but are higher than 50% in all districts in the country (see Figure 2 for more detail). More than two-thirds of households (69%) also own their own radio.

Figure 2: Proportion of adults that can access radio by district; radio audience profile, showing access by gender and location



Nationally, the proportion of adults aged 15 and over who live in urban areas is 25% and 65% in rural areas. The proportion of males is 49% and proportion of females is 51%.



In Sierra Leone, 81% of adults have access to a radio. It is the only traditional media platform that achieves near-gender equity of access and effectively reaches rural audiences

In 2008, a survey commissioned by Fondation Hironnelle and Unicef found that 77% of the adult population in Sierra Leone listened to the radio.<sup>9</sup> A survey conducted by BBC Media Action in 2013 found that 81% of respondents could access the radio. In 2015, little has changed; radio remains a reliable platform on which to reach audiences. In 2008, about 49% of adult Sierra Leoneans reported having listened to the radio on the previous day<sup>10</sup> and in 2015, 47% report that they usually listen each day.

Radio is accessed by a diverse audience. A trend was observed in 2008 that older people listen to the radio more frequently, and this seems to hold true in 2015. Younger people are more likely to listen less frequently or not listen to radio at all than their older counterparts. In 2008, among the 18–25-year-olds interviewed across eight districts, two-thirds (66%) listened to the radio daily. Looking at the entire country in 2015, only 42% of 18–25-year-olds listen every day.<sup>11</sup> By comparison, in 2015, 56% of adults aged over 65 listen to the radio each day.

Radio is the only traditional media platform that almost achieves gender equity in access (51% of those with radio access are men, and 49% are women). For all other media, more men have access than women.<sup>12</sup> In 10 out of 13 districts<sup>13</sup> more than two-thirds of women have access to radio. In the remaining three, Kailahun (65%), Koinadugu (56%) and Bo (56%), still more than half of women have access to radio.

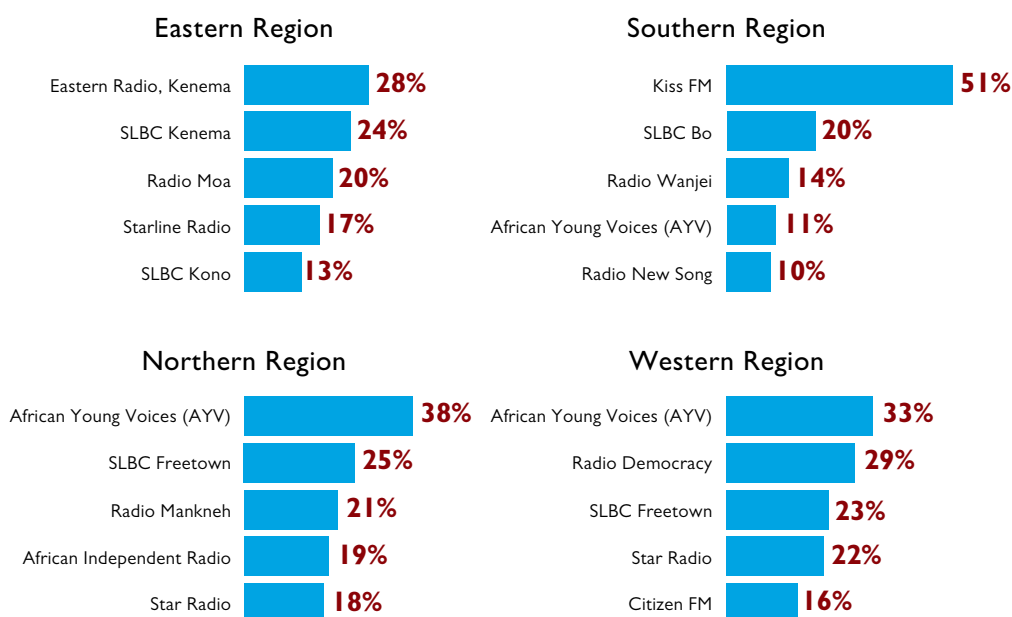
Radio is also the only effective media platform to reach rural audiences. Overall, of those who can access radio, 62% are in rural locations, which is comparable to the overall proportion of people in the sample who live in rural areas (65%).<sup>14</sup> In practice, this means that almost four in five rural dwellers (77%) can access radio. In contrast, only 31% of rural audiences can access TV or DVD content.

### There is greater diversification of radio stations and listenership

The radio landscape has diversified and become more localised throughout the last decade. Correspondingly, the listenership has become much more fractured: nationally, no single station reaches more than one-third of adult Sierra Leoneans. Even among stations operating at a regional level, only a few are followed by more than a third of adults in their region. The national broadcaster, Sierra Leone Broadcasting Corporation (SLBC), and African Young Voices (AYV) radio are the stations that are most popular cross-regionally, although stations such as Star Radio and Africa Independent Radio were also mentioned by participants in many districts.<sup>15</sup> Sierra Leoneans follow two radio stations on average.

As a result, to reach a national audience in contemporary Sierra Leone it is necessary to broadcast on several radio stations. Language differences further complicate this task: 18% of adult Sierra Leoneans speak one of 15 local languages, but neither Krio – the *lingua franca* of Sierra Leone – nor English.

Figure 3: Most popular radio stations in each region



Percentages refer to the proportion of respondents within each region who report that they listen to this station, so percentages add up to more than 100.

There is not a uniform picture as to whether local and district-level radio is typically more popular than the national broadcaster or bigger commercial stations. In some areas – for example Port Loko, Kambia, Western Area and districts in the Southern Province – the bigger, cross-district stations like AYV and Kiss FM, or even Star Radio and Radio Mankneh, are among the most listened to. In other parts of the country, such as Koinadugu and districts in the Eastern Province, district-based stations have higher reported listenership. The popularity of local and district-level stations demonstrates their importance to audiences, alongside the national broadcaster and larger commercial stations.

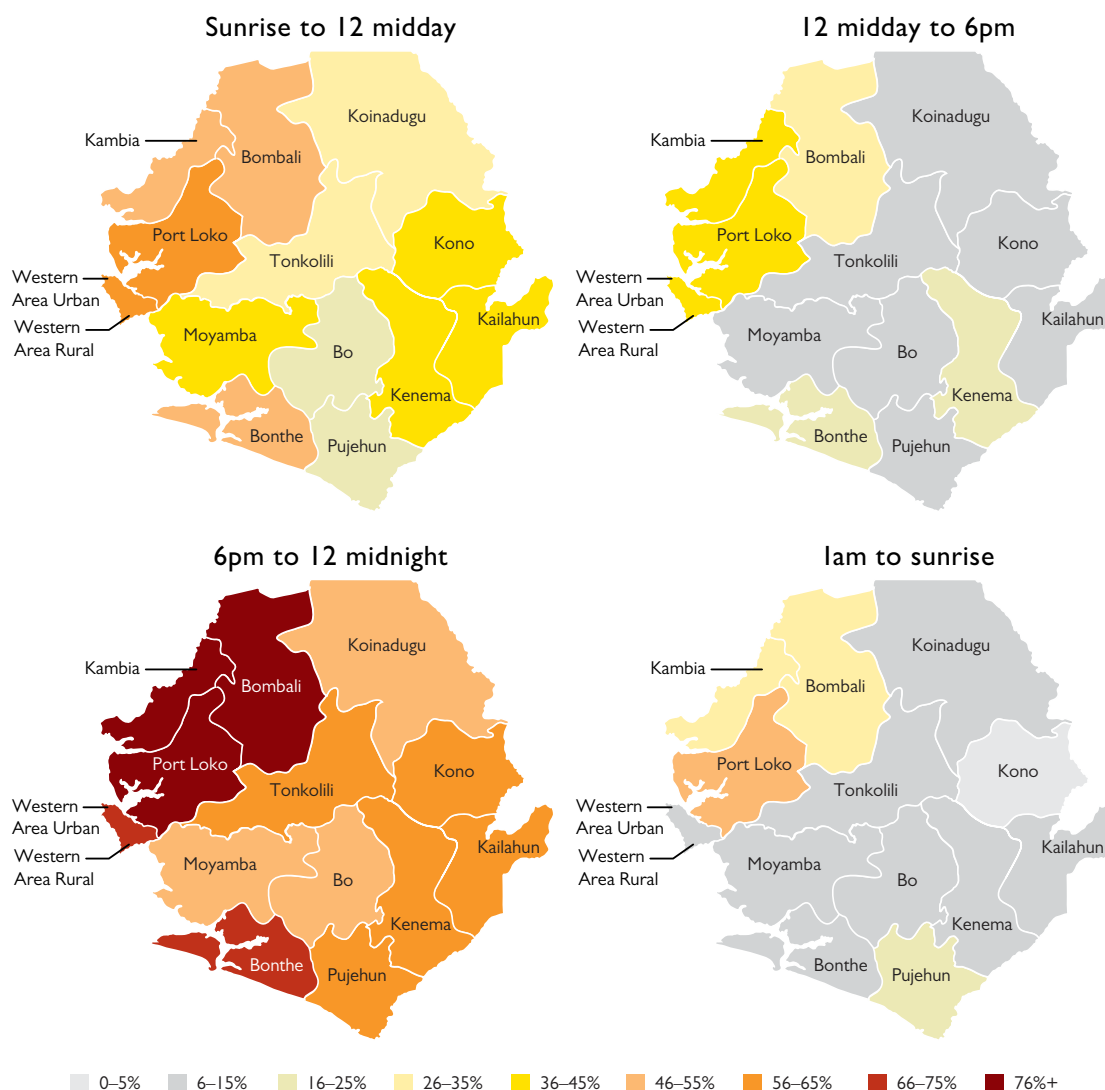
Depending on the district, from 50% to 89% of the population listens to the radio between 6pm and midnight.

### Most adults are frequent listeners to the radio, especially in the evening

Across the country, among all location, gender and age groups, most Sierra Leoneans listen to the radio at least once a week – only 6% of listeners listen less frequently than this.

While Sierra Leoneans listen frequently, they listen more during certain hours. Evenings are particularly popular times to listen to the radio. Depending on the district, from 50% to 89% of the population listens to the radio between 6pm and midnight. All age groups, and both men and women, listen to radio mostly in the evening and the morning.

Figure 4: Popular radio listening times



### Radio was an important source of information during the Ebola outbreak

The Ebola outbreak of 2014–16 highlighted the importance of radio as a key source of information for Sierra Leoneans. Radio – including both national and local broadcasts – was an important medium to support community-led efforts to contain the spread of Ebola. Four knowledge, attitude and practice (KAP) surveys conducted between August 2014 and July 2015 by Focus 1000 and partners suggested that radio was by a distance the leading source through which Sierra Leoneans received information on the Ebola virus. More than 90% of respondents in the second, third and fourth surveys said that they received Ebola information in this way.<sup>16</sup> Findings from the second KAP survey also showed that audiences overwhelmingly rated radio as their preferred method for receiving information about Ebola.





Access to TV in Sierra Leone includes terrestrial TV channels, as well as DVD and video content available at home or in local venues such as community cinemas

## Television

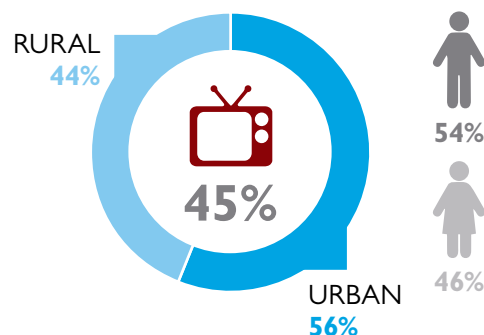
### The TV and DVD landscape is expanding

In all, a total of 45% of Sierra Leoneans can access TV inside or outside their home.<sup>17</sup> In Sierra Leone, watching TV may also include watching non-live content such as DVDs or videos, and the figures shown here refer to the proportion of Sierra Leoneans who use all TV and video platforms – both live and non-live.

Households might have TVs and DVD players at home, but might not necessarily have access to terrestrial TV or a satellite dish. Additionally, watching TV and non-live content in Sierra Leone is often a communal activity. In 2015, more than a quarter of Sierra Leonean households own a TV set or a device to play DVD content. The 2013 BBC Media Action survey found that 18% of households owned a TV, and the 2008 Fondation Hironnelle survey found that 16% said that they watched TV. These figures, however, do not account for households that potentially have screens that allow them to watch DVD content. It is therefore unclear exactly to what extent TV access has changed.

Sierra Leoneans with access to terrestrial TV can receive five local channels: the state provider SLBC, AYV, Star TV, Kedar Faith TV and Destiny Television.<sup>18</sup> International channels are available via satellite TV. People access satellite TV in two ways; via ‘freeview’ boxes, which require a one-off set-up cost of about US\$150, and carry around 20 mostly Ghanaian and Nigerian channels, and through the DSTV monthly subscription service, which is more expensive and offers access to hundreds of channels.

Figure 5: Access to TV and/or DVD and audience profile by gender and location



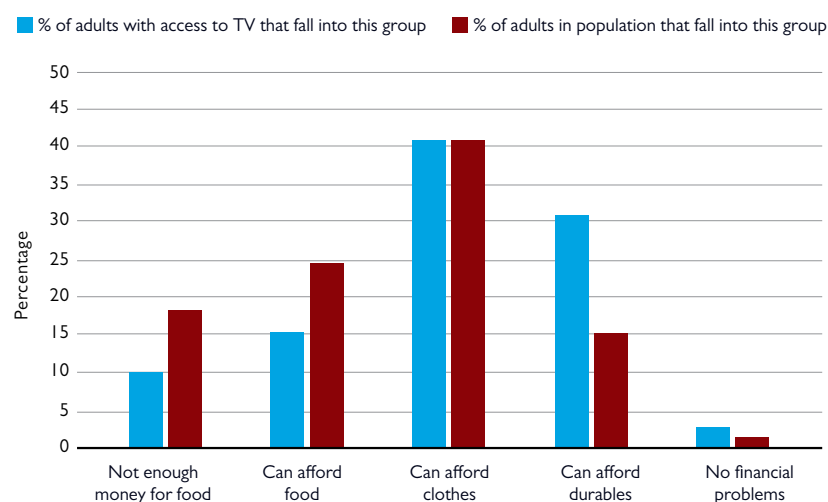
Nationally, the proportion of adults aged 15 and over who live in urban areas is 35%, and 65% for rural areas. The proportion of males is 49% and the proportion of females is 51%.

TV broadcasting began in Sierra Leone in 1963 with the state broadcaster SLBC – then known as the Sierra Leone Broadcasting Service (SLBS) – launching its first channel. The satellite TV provider DSTV started its operations across Africa in 1995. SLBC and DSTV have dominated the Sierra Leonean TV market since then. In 2011 Kedar Faith TV joined the market and more recently, in 2015, AYV and Star TV began broadcasting.

In 2013, BBC Media Action found that only 9% of people in Sierra Leone owned a satellite dish. Subscription packages with DSTV cost between US\$12 and US\$88 per month. With a *per capita* income of US\$58 per month,<sup>19</sup> subscription services are too expensive for the vast majority of Sierra Leoneans. It is therefore likely that only a minority of those with access to TV can afford to subscribe to DSTV. However, cheaper ‘freeview’ boxes open up satellite TV to a wider demographic.

Given the cost of TV sets and DVD players, it is not surprising that TV access differs among income groups (see Figure 6 below). Access to TV and DVDs is particularly widespread in Western Area, where the capital Freetown is located.

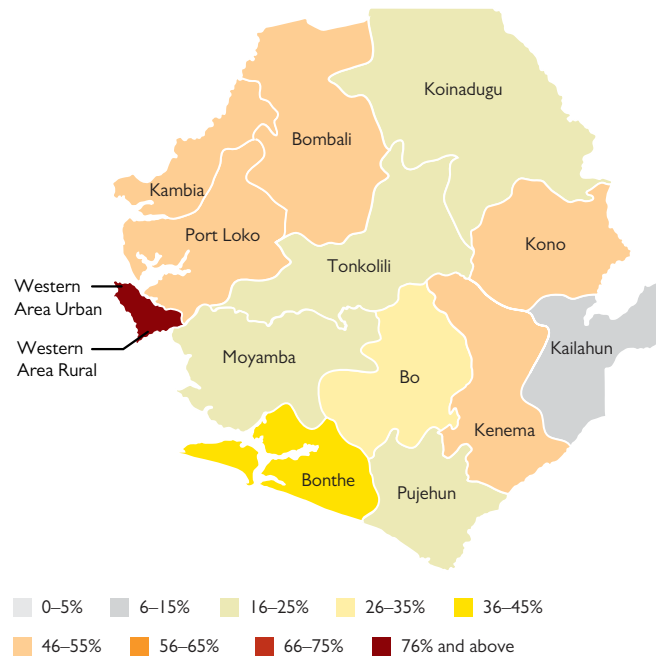
**Figure 6: Proportion of adults with access to TV and/or DVD compared to proportion of general population among different income groups**



TV is also only broadcast currently in urban centres, such as Freetown, Makeni and Bo. This further explains why residents of urban centres (74%) are more likely to have TV access than those living in rural areas (31%) (see Figure 7 for more detail). In addition, men are slightly more likely to have access than women to TV and DVD content – 50% of men compared to 42% of women.



Figure 7: TV access by district



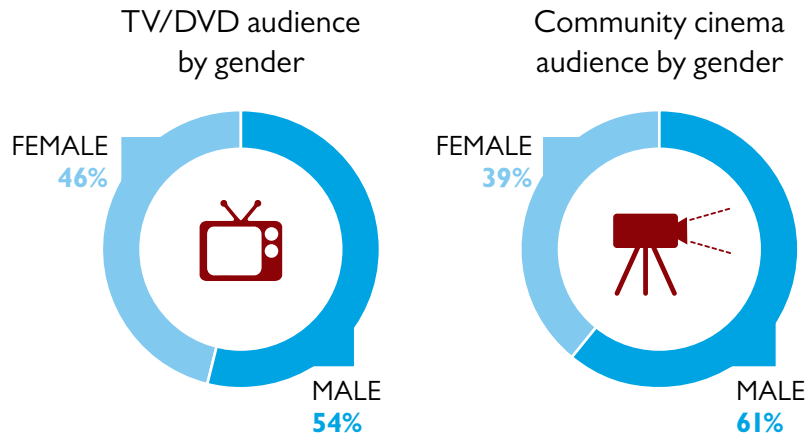
### Community cinemas are another space where young men in particular access media

Community cinemas – places where individuals can watch content with others in exchange for a small fee – are another common way for Sierra Leoneans to access TV broadcasts or DVD and other non-live content. Community cinemas are often still used by those who have TV or DVD access at home; 39% of those who can access TV in their own homes still use community cinemas.

Generally, those aged 15–34 are more likely to access and use community cinemas than older Sierra Leoneans. It is plausible that this age and gender profile is partly due to community cinemas commonly showing football matches, which are widely popular among young men.

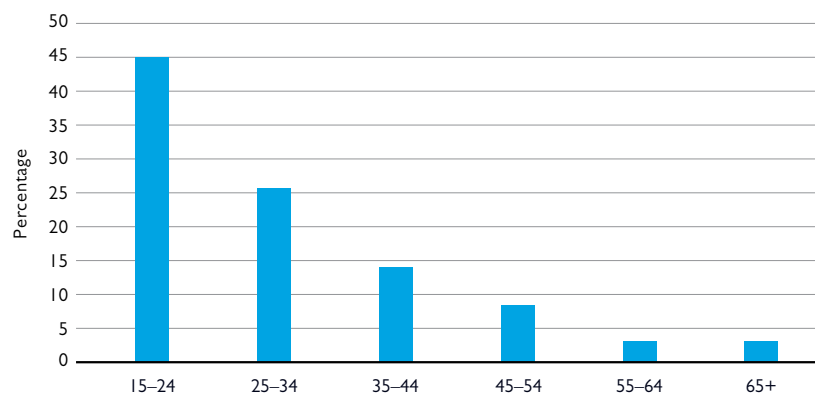
Community cinema access is even more weighted towards young men than TV and DVD access: 61% of those who use community cinemas are male, while only 39% of those who use community cinemas are female. Generally, those aged 15–34 are more likely to access and use community cinemas than older Sierra Leoneans. It is plausible that this age and gender profile is partly due to community cinemas commonly showing football matches, which are widely popular among young men.

Figure 8: TV/DVD and community cinema access by gender



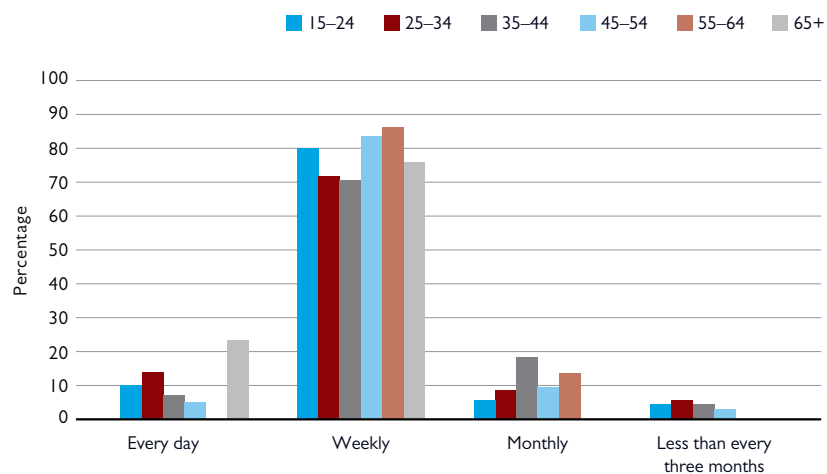
Nationally, the proportion of adults aged 15 and over who live in urban areas is 35%, and 65% for rural areas. The proportion of males is 49% and the proportion of females is 51%.

Figure 9: Community cinema use by age



In terms of frequency, those who use community cinemas have relatively similar habits; most visit them on a weekly basis.

Figure 10: Frequency of community cinema visits by age

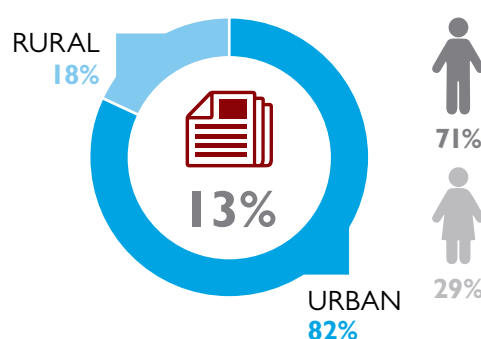


## Print media

### Newspapers remain niche: mostly men, urban, wealthier and more educated people access them

The first ever newspaper in West Africa, the Sierra Leone Gazette, was established in Sierra Leone in 1801. The number of available newspapers has grown steadily. In 2000 there were 10 newspapers in Sierra Leone, by 2005 this had grown to around 40 and by 2010 there were 58 registered papers, of which it is estimated that 40 or so are still in print. However, low circulation, high costs and low literacy levels are the likely reasons why, despite their long history, newspapers have never gained mass readership.<sup>20</sup> Only 13% of Sierra Leoneans have access to newspapers in 2015.

Figure 11: Access to newspapers and audience profile by gender and location

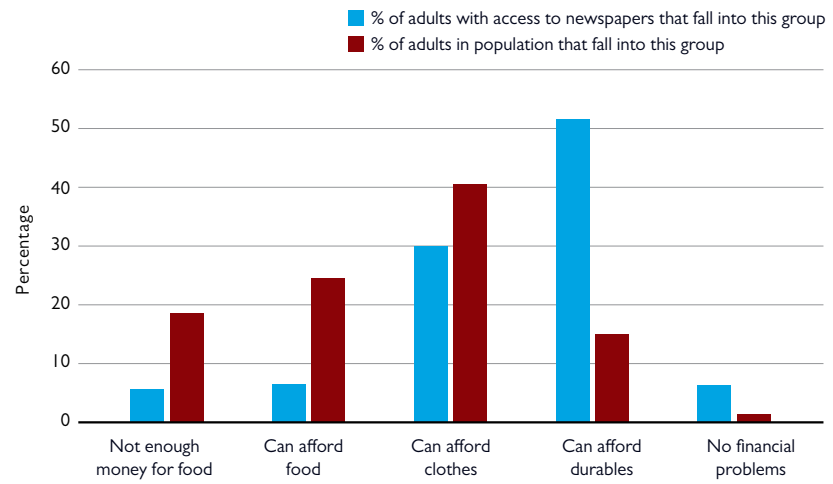


Nationally, the proportion of adults aged 15 and over who live in urban areas is 35%, and 65% for rural areas. The proportion of males is 49% and the proportion of females is 51%.

Literacy is a big barrier; only 38% of adult Sierra Leoneans reported that they can read. The proportion of women who reported this is even lower – 25%, compared to 51% of men. Another limiting factor is that all newspapers are printed in English, which only about a quarter of adult Sierra Leoneans speak. Also, some newspapers are only on sale occasionally, when funds for printing are available. Print runs of newspapers tend to stay within the thousands. Further, newspapers are expensive by local standards: on average they cost US\$0.35, which, for a population that mostly lives on less than US\$1.25 per day, is a substantial amount.

Access to newspapers is higher among men compared to women (71% versus 29%) and those living in urban areas compared to rural areas (82% versus 18%) (see Figure 11). They are accessed by people with higher educational attainments and incomes (see Figure 12); 44% of newspaper readers completed secondary school, while only 3% of Sierra Leoneans have attained an equivalent level of education. About half (52%) of newspaper readers can afford durables such as TVs or refrigerators; BBC Media Action's 2015 survey indicates that only 15% of households nationally can afford to make similar purchases.

Figure 12: Access to newspapers by income status



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In Sierra Leone, 13% of adults have access to newspapers.  
This represents a niche group; mostly male, urban, wealthier  
and more educated

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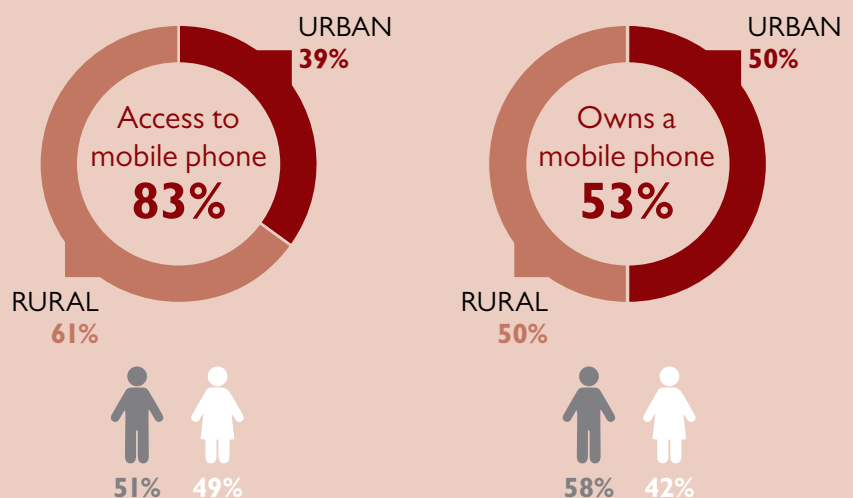
83% of adult Sierra Leoneans have access to a mobile phone, but most have access to basic phones without an internet connection or app capability

## Chapter 2

# The emergence of mobile phones

While radio is likely to continue to dominate the traditional media sector in Sierra Leone, the popularity of mobile phones suggests increased opportunities to use these as a platform to reach and engage with audiences. Access and usage patterns suggest that more young people could be reached via mobile phones than other media. For instance, although 39% of Sierra Leonean radio listeners aged 15–24 still listen to the radio daily, 42% of the same age group do not listen to radio at all.<sup>21</sup> In contrast, 79% of 15–24-year-old mobile phone users use mobile phones on a daily basis and only 12% of this age group never use a mobile phone.

Figure 13: Access to versus ownership of mobile phones: audience profiles for those who access or own mobile phones by gender and location



Nationally, the proportion of adults aged 15 and over who live in urban areas is 35%, and 65% for rural areas. The proportion of males is 49% and the proportion of females is 51%.

The Demographic and Health Survey (2013)<sup>22</sup> found that household ownership of mobile phones increased from 28% to 55% between 2008 and 2013. BBC Media Action's 2015 survey shows that 83% can access one through a household member and 53% of adult Sierra Leonean individuals own a mobile phone. This makes mobile phones the medium with the most rapid expansion and great potential to reach a large number of people in Sierra Leone.

## Access and ownership of mobile phones is widespread, also in rural areas and among women

Compared to any other media platform, mobile phones are accessed by the greatest number of people in Sierra Leone. Eighty-seven per cent of men and 80% of women have access to mobile phones. Importantly, ownership figures are also high for women (44%). Almost half of these users (49%) are women.

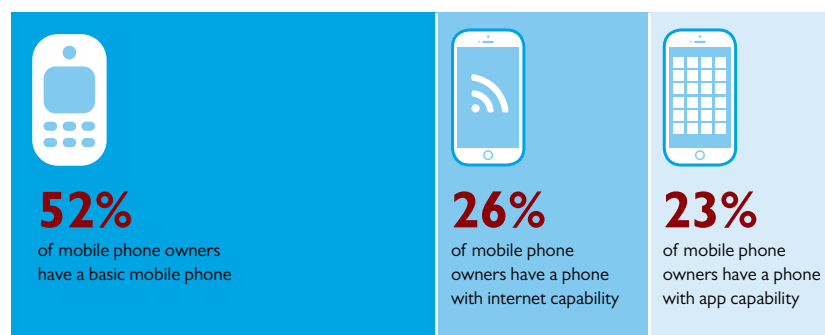
49% of adult Sierra Leoneans never attended school. Only 5% of people without education use text messages, while 51% of people with an education use them.

Mobile phones also reach many people in rural areas: 78% of rural dwellers have access to mobile phones, while only 31% of them have access to TV and a mere 4% have access to newspapers or the internet. Mobile phone access is therefore comparable to the proportion of people in rural areas who have access to the radio (77%). Women and people living in rural areas are more likely to have access to a mobile phone than to TV, internet or newspapers.

## Most people own basic phones without internet or apps

Although mobile phone access is high, this does not yet mean high levels of smartphone penetration. More than half (52%) of adult Sierra Leonean mobile phone owners own basic mobile phones. These might have a camera (29%) or a radio (15%), but cannot connect to the internet or operate apps (see Figure 14).

Figure 14: Breakdown of types of phones owned by adult Sierra Leoneans



The vast majority of mobile phone owners (87%) own one handset but 34% use more than one Sim card. This is likely driven by higher costs associated with calling between networks. Instead of incurring higher



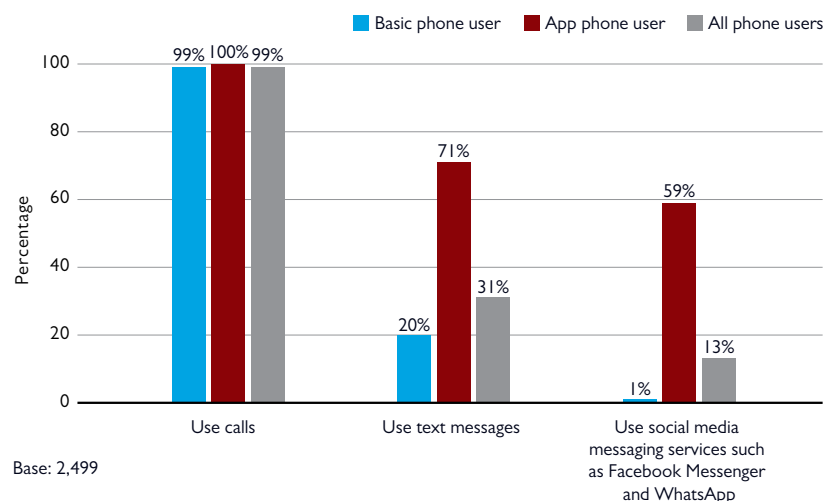
costs, mobile phone users may switch Sim cards if they want to call someone on a different network. Considerable numbers of people own handsets produced by firms like Nokia (39%) and iTel (33%), which offer several models that allow dual Sim card use. Most mobile phone users do not incur extra running costs if they own more than one Sim card at a time because they pay per usage rather than on a monthly basis: 97% use scratch cards and vouchers from retailers. Vouchers are credit transfers from salesmen: the client provides the amount they want to top up in cash and their number to the seller, who then transfers the sum on to the client's phone. Three per cent of respondents were not aware of the mechanism that is used to top up their phone. Only a tiny minority (0.3%) receive credit via transfers from contacts. None of the respondents interviewed used post-paid lines.

## Calls and voice-based services are best suited to reaching a wide audience through mobile phones

Although literacy is low in Sierra Leone, this does not prevent people from using mobile phones. However, users are much more likely to use phones to make calls (99% of mobile phone users do this) than to send text messages (33%) or use social media messaging (13%) (see Figure 15).

Usage of social messaging services is also more common among young urban males. Eighty-three per cent of social messaging services users live in urban areas and only 17% in rural ones. Only a third of social messaging users in Sierra Leone are women. Use of social messaging services is most common among the youngest age group and less common among older respondents. For instance, while 19% of all 15–24-year-olds use their phones for social messaging, only 9% of 35–44-year-olds do so. Calls and voice-based services are therefore best suited to reaching a wide audience, including more marginalised populations.

Figure 15: Mobile phone type and use



The majority of mobile phone users (74%) say they do not require any help to make calls and receive texts, but 26% are learning how to use this technology; they mostly do not operate their phone on their own, but ask for help. Around a quarter of respondents also note that they require some help to use their mobile phone. Women, older people and people living in rural areas are more likely to need assistance with calling and texting. Those who need assistance to use a basic phone are more likely to be less educated. They are also more likely to suffer from a disability. Of those who do not operate the phone on their own, the majority ask for help to make calls (81%), rather than for texting or using social media.

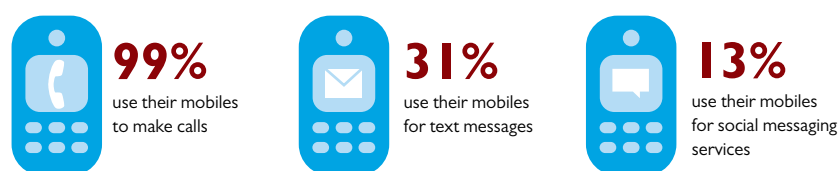
## Mobile phone usage is focused on dealing with urgent matters through calls

Calls are ubiquitously used in Sierra Leone; 99% of people with mobile phone access use their phones to make calls, while 31% use texts and 13% use social messaging functions.

For 85% of Sierra Leoneans, the main reason to use their phone is to deal with urgent tasks and chores. Seventy-four per cent use calls for this, 28% of them also use texts and 9% use social messaging services. Mobile phones are also used for entertainment. About four out of 10 mobile phone users engage in more casual chatting, whenever they have free time, using calls to do so. Social messaging services are the second most common function that mobile phones are used for (20% of users report using these). Fifteen per cent use text messages for chatting.

About a quarter of people (26%) use a phone to listen to MP3s and 21% to the radio.<sup>23</sup> Somewhat fewer adults (14%) commonly use their phone for watching videos; 80% of those who watch videos with their phones own a phone that has internet or app capability.

Figure 16: Purposes of mobile phone use



A tenth of Sierra Leoneans use a mobile phone to get information. A little more of these users (95%) simply call other people in such instances. Only a tiny fraction of people use call-in or text-based services (3%) or the internet (2%).

## Choice of network and perceptions of network quality: many customers circumvent charges but most face problems with signal quality

The mobile phone market in Sierra Leone is dominated by two network providers: Airtel, an Indian-owned provider that also operates in several West, East and Central African countries,<sup>24</sup> and Africell, a subsidiary of Lebanon-based Lintel Holding.<sup>25</sup> Of those who own a phone, 53% of respondents say that they mostly use Africell, while 46% mostly use Airtel. As mentioned earlier, more than a third of people with access to a mobile phone own two Sim cards. Almost all of them (92%) own a Sim card for both major networks, which enables them to switch between networks while avoiding the higher fees for cross-calling between networks. The other two competitors – SMART Mobile, a Russian-owned provider registered in Cyprus,<sup>26</sup> and national provider Sierratel – hold a very small market share (1.1% and 0.4%, respectively).

In urban areas, 9% use mobile money services compared to 1% in rural areas. 75% of mobile money users are smartphone users.

Those who use Africell as their primary network are significantly more likely to live in urban areas, are younger, better educated and relatively better off. Airtel users were more likely to live in the Eastern and Southern provinces.

Network quality is still a challenge for communication in Sierra Leone; 51% of adult Sierra Leoneans who use mobile phones judge their network quality to be of mixed or bad quality. This percentage is significantly higher (62%) in rural areas.

## Top-up methods, frequency and estimated spend: phone credit salesmen facilitate frequent top-ups

The vast majority of adult Sierra Leoneans (83%) top up their mobile phone credit at least once per week. Around two-thirds use 'vouchers' to transfer credit to their phones. This method is significantly more popular than scratch cards, which are used by 32% of people.

When asked about their expenditure, respondents struggled to determine how much money they spent on each top-up and how often they buy credit. While some stated lower figures, BBC Media Action assumed a minimum amount of SLL1,000 (about US\$0.24<sup>27</sup>), which is the smallest amount network providers allow users to spend on top-ups. On average, users spent between SLL3,000 (about US\$0.74) and SLL4,000 (about US\$0.96). There is little variation in amounts

spent by those who top up daily compared to those who buy credit less frequently, but this might be due to a reporting bias caused by the large number of respondents who had trouble recalling the amount and frequency of purchasing calling credit. Cost of calls per minute can range from SLL350 (US\$0.084) to SLL697 (US\$0.17), depending on mobile network provider and tariffs.<sup>28</sup>

# Chapter 3

## Internet and social messaging services

Sixteen per cent of adults in Sierra Leone can access the internet, with access anticipated to increase. The planned expansion of fibre optic cable across districts in Sierra Leone is set to increase access to faster, more powerful internet.<sup>29</sup> Several telecommunication companies also provide internet access via modems. Almost everyone who has access to internet also owns a mobile phone (92%). For 88% of those who have access to the internet, their mobile phone can be used to connect to the internet and to use internet-based social media such as Facebook and WhatsApp. Modems and fixed connections are more expensive and often slower than mobile internet connections.<sup>30</sup> It is therefore likely that most Sierra Leoneans access the internet via their mobile phones.

Only 5% of teenage girls and 25% of teenage boys living in rural areas have access to the internet. Rural and urban teenagers have greater access to the internet than newspapers.

Using phones for social messaging is still limited in Sierra Leone. According to BBC Media Action's 2015 national survey, 2% of adult Sierra Leoneans use Facebook Messenger from their phone. The only other social messaging platform accessed from a phone and used by more than 1% of the population is WhatsApp, which is used by 2% of adults. Whilst some other social messaging platforms are available for use in Sierra Leone,<sup>31</sup> less than 1% of the population reports using their phones for this. In addition to social messaging services, some adults have social media profiles; according to Facebook Audience Insights, around 250,000–300,000 Facebook profiles are currently active in Sierra Leone, which corresponds to about 7% of the adult population.<sup>32</sup>

# Chapter 4

## Understanding Sierra Leone's media users

As noted in the previous section, the vast majority of Sierra Leoneans can access radio (81%) and mobile phones (83%), and those who can access both media do so frequently: 47% listen to the radio every day and 52% use their phone on a daily basis.<sup>33</sup>

But there are some differences between rural and urban areas, genders and user types that need to be taken into account to understand which audiences can be reached through which platforms. This section outlines these main differences and provides audience profiles to illustrate ways in which communication can reach different audiences for various purposes.

### Rural audiences access fewer types of media, and do so less often

Rural audiences generally have less access to media than those living in urban areas. In urban areas the majority have access to mobile phones (94%), radio (89%) and TV (74%). While in rural areas the majority only access mobile phones (78%) and radio (77%), with TV access at only 31%. Rural audiences, however, use their mobile phones less frequently and are less likely than urban audiences to listen to the radio daily.

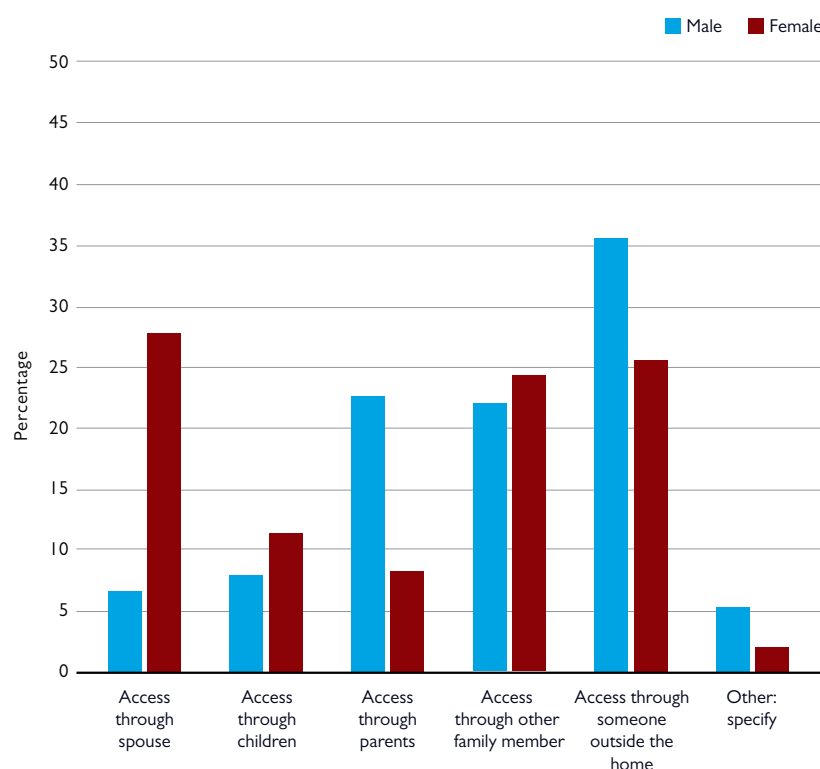
### Women have less direct access to media

Women in low-income countries tend to have less access to media than men<sup>34</sup> and Sierra Leone is no exception. In all, 9% of people in Sierra Leone report that they cannot access any of the media asked about. More than half (58%) of the 'media dark' category – those who lack access to all forms of media – are women. Women are less likely than men to access a TV or radio within their homes. Forty-two per cent of Sierra Leonean women can access TV and 78% can access radio, compared to 50% and 84% of men, respectively. Women are also less likely to own a phone (44% of women versus 62% of men). They use phones and listen to the radio slightly less frequently than men.

While mobile ownership among men is slightly higher than for women, around two-thirds (62%) of men who do not own a mobile phone also access one through other people.

Women are more likely than men to have access to mobile phones only through other people. A substantial amount of women's mobile phone use is mediated by men. About two-thirds (65%) of women who do not own a mobile phone have access to one. Almost one in three women access a phone through their spouses (28%). While mobile ownership among men is slightly higher than for women, around two-thirds (62%) of men who do not own a mobile phone also access one through other people. However, unlike women, far fewer men depend on their spouses. Younger men are more likely to access mobile phones through their parents, while older men tend to rely on other family members or outsiders.

Figure 17: Proportion of men and women who access a mobile phone through someone else and do not own a mobile phone themselves



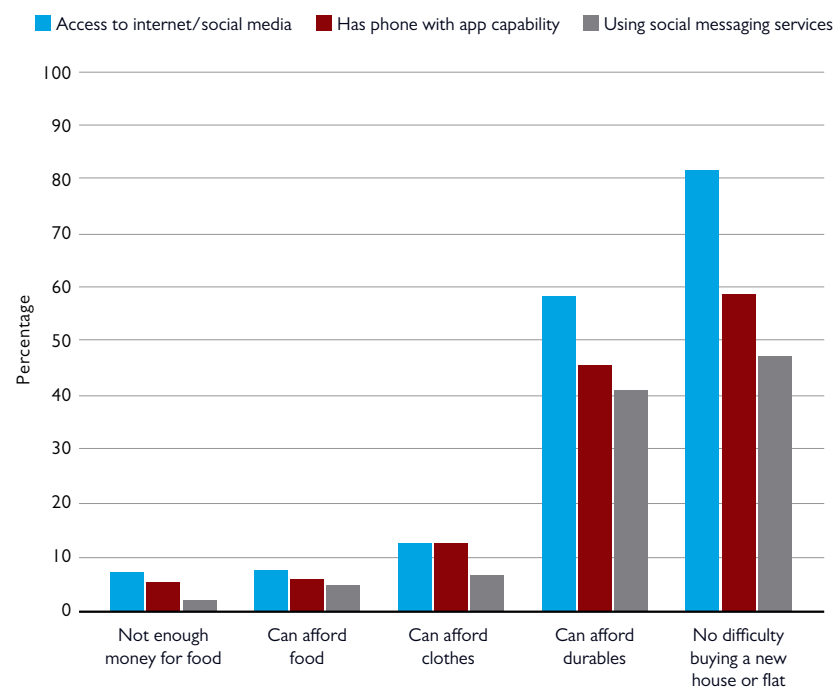
Some forms of media – particularly newspapers and social messaging services – are predominantly accessed by men (as noted in sections 3 and 5). Research on media access across the African continent has suggested that gender imbalances in media access mainly derive from women's lower educational, income and occupational status compared to men<sup>35</sup> as good education and high income, particularly, provide more opportunity to access media.<sup>36</sup> Some studies in Eritrea<sup>37</sup> and India<sup>38</sup> in addition find negative effects of gender stereotypes and educational

systems that encourage men more than women to adopt new technologies. Rural areas are at a natural disadvantage to urban areas since they usually have worse electricity supply and sometimes lack the necessary infrastructure to receive signal.

## Social media is an elite form of communication

Sierra Leonean people who use social media on their phone are very different from those who only use their phones for texts or calls. Those who only use their phone to call and text mostly live in rural areas (67%). Eighty-three per cent of social messaging<sup>39</sup> users live in urban areas; 69% of social media users live in Western Area Urban or Rural. Social media users are also wealthier; 47% of them say that they are wealthy enough to afford to buy a house or flat. This group comprises only 2% of the adult Sierra Leonean population.

Figure 18: Use of internet, apps and social media messaging services by income type



## People showed a high level of demand for more information on a wide range of topics

There was a high level of interest from audiences in gaining access to further information in a range of areas. All respondents are interested

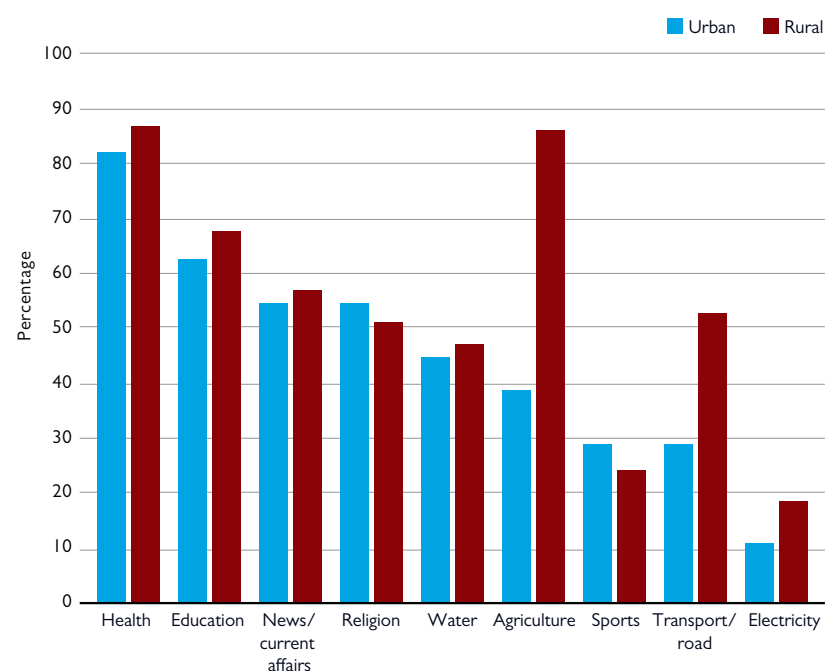


in receiving information about at least one subject. Overall, the most commonly mentioned topics are health (85%) and agriculture (70%).

Greater interest among rural dwellers in service delivery related to roads and transport reflects differences in access to infrastructure – access to electricity, good roads and health services is worse in rural areas.<sup>40</sup> Greater demand for information in rural areas may also be linked to significant demographic differences: Sierra Leone's rural population is poorer, less educated and older than people living in urban areas. Rural respondents are also overall more likely than urban people to say that they want information on a topic but that they had not received any in the last three months (13% compared to 8%).

Rural respondents also note specific areas of interest both in relation to agriculture and health. The type of agriculture information that they are most interested in are technical farming skills (58%), pest and disease control (50%) and the latest agricultural news (47%). In terms of information about health, rural respondents are most likely to mention that they want to hear more about malaria or typhoid (32%) followed by Ebola (21%) and making water safe to drink (15%).

Figure 19: Interest in receiving more information by topic: rural versus urban



## Audience profiles

Based on analysis of the 2015 survey data, BBC Media Action has developed a range of audience profiles. These are designed to illustrate some of the typical ways that different types of audiences use and engage with media and mobile platforms in Sierra Leone.



### Alpha

Secondary school student living in Freetown | Male, aged 15–18



Alpha owns a Samsung smartphone, which is his most treasured possession. He loves using it to take pictures of himself with friends. He also uses the radio on the phone to tune into his favourite radio stations AYV and Star Radio. He uses his phone several times every day to make calls about matters that are important to him. Alpha is interested in education and football. Apart from his family, he chats with his friends whenever he has free time. Social messaging is still expensive, so he tops up most days, spending about SLL2,000 (US\$0.48) at a time. Thankfully, he gets extra money for phone credit running errands for neighbours. When he is not on his mobile, Alpha sometimes watches TV with his family or reads a newspaper article that his older brother recommends to him.



### Isatu

Secondary school student in village close to a district centre | Female, aged 15–18



At home, Isatu listens to the radio about once a week. Otherwise, days are busy with going to school and doing household chores. Isatu's brother owns a mobile phone that she sometimes uses to call her cousins, her auntie or her friends. Mostly she only calls to deal with things that are urgent. Once a week, Isatu travels to the local district centre to visit a community cinema with her school friends in order to watch the latest movies from Nigeria or Sierra Leone. She is also a fan of TV soap operas from Mexico, but doesn't get as much chance to see these as she would like to.



### Zeinab

Saleswoman living in a town | Female, aged 20–30



Zeinab loves listening to the radio and at home she enjoys watching TV too. Her most cherished possession is her phone. It is relatively basic but she can call and text. Sometimes she also uses the phone to take pictures of her friends or tune into her favourite radio show, so as not to miss it. A few times a week, Zeinab phones her family members and her boyfriend to discuss urgent matters or just to chat.



### Mariatu

Rural farmer | Female, aged 30–40



Mariatu works as a farmer on rice fields, not far from her house. When she comes back home in the evenings, she listens to the radio. She usually does it 2–3 times per week. She specifically likes programmes on agriculture and health. She always tells her children to listen to them to learn how they can protect themselves from diseases like malaria and typhoid. The radio is the main medium for Mariatu. Her husband has a basic phone, but she only uses it to arrange family gatherings with her sister who lives in a village in the same district. If there is credit, Mariatu also calls her cousin in Freetown every week but sometimes she has to wait a while until her husband can charge the phone again. Mariatu only makes calls and does not use texts. She finds the phone a bit confusing to operate, but her husband is always willing to help her make calls with the phone.



### Barry

Rural farmer | Male, aged 40–45



Barry is a farmer and the radio is his main source of information. Barry listens to the radio almost every day, and he is especially interested in the news and in programmes on agriculture. To coordinate working on his farm and trips to the market with his brother and cousins, Barry uses his basic mobile phone. Barry makes several calls a day to family members and friends, to make arrangements for both family and work.

# Chapter 5

## Conclusions

The media landscape in Sierra Leone has changed significantly in recent years, with the expansion of the number of radio and TV stations, and the growth of new media such as mobile phones and the internet.

- **Radio continues to be the most effective platform for reaching a wide audience** – with a greater level of access than either TV or the internet.
- The number of radio stations has increased, particularly the number of local stations. As a result, **radio listenership has become much more fractured** – and no single station has the capability to reach a national audience on its own. Reaching a national audience by radio, therefore, requires working with a large number of stations.
- Gender, location, education and income level continue to be determinants of access to media in Sierra Leone, with urban, male, well-educated and better-off audiences able to access more media platforms and do so more frequently. **Radio and mobile phones, however, are the two media where access is most even across demographic groups and are the platforms through which it is easiest to reach women and rural audiences.** In contrast, newspapers and the internet remain primarily urban media and are more heavily accessed by men.
- There has been rapid growth in access to mobile phones in recent years, and they are now widespread across Sierra Leone. **Mobile phones provide a new opportunity for reaching audiences, and potentially a way of communicating with people directly and individually.** There are caveats, however, both to distributing and receiving content by mobile phone. A notable factor is the comparatively low use of any phone features other than making calls. This is compounded by low literacy – particularly in rural and older audiences. Mass distribution of written content to mobile phones, therefore, would be a limited means of taking advantage of the access they offer.

- **Social messaging services is a small but growing phenomenon** that is most observable among younger audiences in Freetown. Usage is also linked to smartphone ownership, and less than a quarter of all phones owned in Sierra Leone have this capability. BBC Media Action observations in other countries suggest that young audiences in major cities are often early adopters of trends, and so use by this group may be a sign that social messaging services access could be expected to expand. At the time of writing, however, social messaging services' offers access to only a limited proportion of the population.

Overall, radio continues to be a dominant media platform in Sierra Leone but it has become increasingly fragmented. Access to mobile phones has increased and reaches a similarly high number of people. There is therefore significant potential in leveraging this reach and further exploring this opportunity to engage adults in Sierra Leone. It is important to take into account, however, that more than half of mobile phone owners have a basic feature phone without internet or app capability, and that a quarter of mobile phone users need help to operate their phones. Social media is a growing phenomenon but is still limited to specific demographic groups, as is access to TV and print media.

# Annex I

## Further data tables

This annex includes data tables that show how different demographics answered some key questions from the nationally-representative survey conducted in late 2015.

The figures shown in the tables indicate the proportion of people from each group who gave a particular answer. For example, a figure of 10% in the column marked 'Male', means that 10% of males gave the corresponding answer to that question.

### i) Access by media type (includes access in and/or out of the home) – by gender, age, location and province

	Gender			Age					
	Overall	Male	Female	15–24	25–34	35–44	45–54	55–64	65+
Base <sup>41</sup>	2,499	1,232	1,267	813	609	445	259	181	192
Access to TV	45.4%	49.8%	42.0%	50.6%	46.4%	44.6%	44.7%	38.7%	35.3%
Access to radio	81.0%	84.3%	77.9%	81.4%	81.3%	81.5%	82.7%	76.1%	80.1%
Access to community cinema	32.3%	39.9%	24.9%	36.9%	33.7%	28.1%	34.0%	24.9%	22.9%
Access to mobile	83.5%	86.9%	80.3%	82.5%	84.4%	86.7%	86.9%	79.0%	76.8%
Access to newspapers	12.7%	18.1%	7.4%	15.2%	13.9%	10.5%	12.1%	7.3%	8.3%
Access to internet	15.6%	20.6%	10.4%	23.0%	17.2%	9.9%	9.7%	7.2%	6.0%

### Continued

	Location		Province			
	Urban	Rural	North	East	South	West
Base <sup>41</sup>	864	1,636	884	599	542	474
Access to TV	73.6%	31.0%	40.4%	39.7%	24.2%	87.6%
Access to radio	88.5%	77.1%	83.1%	79.8%	68.4%	93.0%
Access to community cinema	47.5%	24.3%	31.2%	43.0%	18.1%	36.9%
Access to mobile	94.4%	77.7%	86.9%	81.6%	67.0%	98.3%
Access to newspapers	29.7%	3.5%	4.1%	8.8%	5.9%	40.6%
Access to internet	35.6%	4.2%	5.9%	9.0%	7.7%	48.0%

ii) Access by media type (includes access in and/or out of the home) – by district

	District							
	Overall	Bo	Bombali	Bonthe	Kailahun	Kambia	Kenema	Koinadugu
Base	2,499	228	206	71	181	135	249	230
Access to TV	45.4%	27.0%	54.4%	36.6%	13.9%	55.2%	50.0%	19.4%
Access to radio	81.0%	59.9%	94.2%	82.9%	70.7%	91.9%	86.7%	63.0%
Access to community cinema	32.3%	17.1%	32.0%	19.7%	28.7%	24.6%	42.3%	25.7%
Access to mobile	83.5%	59.2%	93.7%	88.7%	76.2%	99.3%	81.5%	71.7%
Access to newspapers	12.7%	9.5%	7.7%	6.0%	1.8%	3.0%	11.8%	1.3%
Access to internet	15.6%	11.4%	8.7%	4.4%	1.5%	9.0%	9.9%	1.8%

Continued

	District					
	Kono	Moyamba	Port Loko	Pujehun	Tonkolili	Western Area
Base	169	112	176	131	137	474
Access to TV	52.7%	19.6%	53.4%	16.7%	22.2%	87.6%
Access to radio	79.3%	67.9%	98.3%	75.8%	73.0%	93.0%
Access to community cinema	59.2%	13.3%	40.3%	22.1%	34.3%	36.9%
Access to mobile	87.6%	57.1%	99.4%	77.1%	73.5%	98.3%
Access to newspapers	10.8%	3.5%	6.9%	1.5%	1.5%	40.6%
Access to internet	13.8%	1.3%	8.3%	8.0%	3.0%	48.0%

iii) How often do you usually listen to radio? – by gender, age, location and province

	Gender			Age					
	Overall	Male	Female	15–24	25–34	35–44	45–54	55–64	65+
Base	2,024	1,038	986	662	495	362	214	138	154
Every day	47.2%	52.1%	42.0%	39.1%	47.1%	54.4%	50.9%	51.4%	56.5%
At least 2–3 times a week	26.0%	26.9%	25.1%	29.3%	29.1%	23.2%	24.3%	21.0%	14.9%
At least once a week	10.5%	8.9%	12.4%	11.9%	9.3%	9.4%	8.4%	14.5%	10.4%
Less than once a week	5.9%	3.9%	7.9%	6.2%	5.9%	4.7%	6.1%	5.1%	7.8%
Does not currently listen	10.4%	8.2%	12.7%	13.4%	8.7%	8.3%	10.3%	8.0%	10.4%

Continued

	Location		Province			
	Urban	Rural	North	East	South	West
Base	765	1,259	736	477	370	441
Every day	54.5%	42.7%	45.1%	44.4%	43.0%	57.4%
At least 2–3 times a week	25.8%	26.1%	24.3%	29.4%	23.5%	27.2%
At least once a week	8.0%	12.2%	11.3%	10.1%	13.5%	7.3%
Less than once a week	4.7%	6.6%	6.5%	5.9%	7.6%	3.4%
Does not currently listen	7.1%	12.4%	12.8%	10.3%	12.4%	4.8%

iv) How often do you usually listen to radio? – by district

	District						
	Overall	Bo	Bombali	Bonthe	Kailahun	Kambia	Kenema
Base	2,024	136	195	59	129	123	215
Every day	47.2%	39.0%	48.7%	45.8%	46.5%	56.1%	41.9%
At least 2–3 times a week	26.0%	23.5%	26.7%	23.7%	27.9%	20.3%	34.0%
At least once a week	10.6%	17.6%	6.7%	11.9%	14.7%	13.0%	6.0%
Less than once a week	5.9%	5.1%	6.2%	11.9%	3.1%	3.3%	7.9%
Does not currently listen	10.4%	14.7%	11.8%	6.8%	7.8%	7.3%	10.2%

Continued

	District						
	Koinadugu	Kono	Moyamba	Port Loko	Pujehun	Tonkolili	Western Area
Base	144	133	76	172	100	101	441
Every day	27.8%	46.6%	43.4%	57.6%	46.0%	28.7%	57.4%
At least 2–3 times a week	30.6%	23.3%	32.9%	16.9%	17.0%	28.7%	27.2%
At least once a week	16.0%	12.0%	13.2%	11.6%	9.0%	9.9%	7.3%
Less than once a week	8.3%	5.3%	2.6%	4.1%	12.0%	12.9%	3.4%
Does not currently listen	17.4%	12.8%	7.9%	9.9%	16.0%	19.8%	4.8%

v) When do you usually listen to the radio? – by gender, age, location and province

	Gender			Age					
	Overall	Male	Female	15–24	25–34	35–44	45–54	55–64	65+
Base	2,499	1,232	1,267	813	609	445	259	181	192
Morning (sunrise–midday)	43.5%	51.1%	36.0%	37.5%	45.8%	46.7%	48.5%	41.4%	48.7%
Lunchtime (midday–2pm)	11.5%	11.4%	11.5%	7.6%	12.3%	14.6%	13.5%	12.7%	14.1%
Afternoon (2pm–6pm)	20.1%	21.4%	18.8%	17.3%	19.7%	22.5%	20.5%	20.4%	27.1%
Evening (6pm–midnight)	66.1%	70.1%	62.3%	62.7%	68.8%	67.9%	68.5%	63.2%	67.7%
Night-time (1am–sunrise)	16.3%	17.0%	15.6%	11.9%	15.8%	25.2%	17.0%	19.3%	11.5%

Continued

	Location		Province			
	Urban	Rural	North	East	South	West
Base	864	1,635	884	600	542	474
Morning (sunrise–midday)	57.2%	36.2%	41.3%	43.4%	28.7%	64.3%
Lunchtime (midday–2pm)	18.8%	7.6%	10.1%	7.2%	7.4%	24.1%
Afternoon (2pm–6pm)	29.5%	15.2%	21.7%	12.0%	10.9%	38.0%
Evening (6pm–midnight)	68.4%	65.0%	72.1%	59.2%	56.6%	74.9%
Night-time (1am–sunrise)	13.9%	17.5%	26.2%	9.2%	12.4%	11.2%

vi) When do you usually listen to the radio? – by district

	District						
	Overall	Bo	Bombali	Bonthe	Kailahun	Kambia	Kenema
Base	2,499	228	206	71	181	135	249
Morning (sunrise–midday)	43.5%	18.4%	47.8%	52.1%	43.6%	52.6%	42.6%
Lunchtime (midday–2pm)	11.5%	7.0%	10.7%	14.1%	3.9%	15.6%	6.4%
Afternoon (2pm–6pm)	20.1%	9.2%	24.6%	15.5%	10.5%	32.6%	13.3%
Evening (6pm–midnight)	66.1%	49.6%	84.0%	71.8%	56.6%	81.5%	62.2%
Night-time (1am–sunrise)	16.3%	8.8%	25.6%	11.3%	9.4%	31.9%	12.5%



Continued

	District						
	Koinadugu	Kono	Moyamba	Port Loko	Pujehun	Tonkolili	Western Area
Base	230	169	112	176	131	137	474
Morning (sunrise–midday)	25.7%	44.4%	42.0%	56.8%	22.1%	26.3%	64.3%
Lunchtime (midday–2pm)	7.4%	11.2%	6.2%	11.9%	6.1%	5.8%	24.1%
Afternoon (2pm–6pm)	10.4%	11.8%	9.8%	34.9%	12.1%	8.8%	38.0%
Evening (6pm–midnight)	50.4%	57.4%	54.0%	89.2%	62.6%	59.1%	74.9%
Night-time (1am–sunrise)	11.7%	3.6%	13.4%	55.4%	17.6%	8.0%	11.2%

vii) Which of the following purposes do you usually use the mobile phone for?  
– by gender, age, location and province

	Gender			Age					
	Overall	Male	Female	15–24	25–34	35–44	45–54	55–64	65+
Base	2,080	1,069	1,011	670	513	385	226	140	146
Usually use phone for calls <sup>42</sup>	98.9%	99.0%	98.8%	97.8%	100%	99.0%	99.6%	99.3%	98.6%
Usually use phone for SMS <sup>43</sup>	31.2%	38.8%	23.0%	45.4%	32.2%	23.1%	21.3%	17.1%	12.2%
Usually use phone for social messaging <sup>44</sup>	12.8%	17.3%	8.0%	19.0%	16.3%	8.8%	6.7%	2.9%	1.4%

Continued

	Location		Province			
	Urban	Rural	North	East	South	West
Base	815	1,265	764	489	361	466
Usually use phone for calls <sup>42</sup>	98.8%	99.0%	99.3%	98.4%	99.4%	98.3%
Usually use phone for SMS <sup>43</sup>	48.0%	20.3%	22.1%	24.0%	26.9%	56.7%
Usually use phone for social messaging <sup>44</sup>	27.0%	3.6%	3.8%	5.9%	6.4%	39.5%

viii) Which of the following purposes do you usually use the mobile phone for? – by district

	District						
	Overall	Bo	Bombali	Bonthe	Kailahun	Kambia	Kenema
Base	2,080	135	193	63	137	134	203
Usually use phone for calls <sup>45</sup>	98.9%	100.0%	100.0%	96.8%	97.1%	99.3%	99.0%
Usually use phone for SMS <sup>46</sup>	31.2%	30.4%	20.7%	41.3%	20.4%	25.4%	20.6%
Usually use phone for social messaging <sup>47</sup>	12.8%	11.1%	4.7%	4.8%	1.5%	5.2%	4.9%

Continued

	District						
	Koinadugu	Kono	Moyamba	Port Loko	Pujehun	Tonkolili	Western Area
Base	165	148	62	176	101	97	466
Usually use phone for calls <sup>45</sup>	100.0%	98.6%	100.0%	98.3%	100.0%	99.0%	98.3%
Usually use phone for SMS <sup>46</sup>	27.9%	32.4%	35.5%	17.7%	8.8%	18.6%	56.7%
Usually use phone for social messaging <sup>47</sup>	3.0%	11.5%	0.0%	3.4%	5.0%	2.0%	39.5%

ix) Mobile literacy<sup>48</sup> – by gender, age, location and province

	Gender			Age					
	Overall	Male	Female	15–24	25–34	35–44	45–54	55–64	65+
Base	1,985	1,027	958	648	483	369	215	135	135
Struggling	0.4%	0.1%	0.6%	0.3%	0.2%	0.3%	0.5%	0.0%	1.5%
Learning	25.5%	16.6%	35.2%	16.2%	21.9%	27.1%	31.2%	40.7%	54.8%
Basic literacy	74.1%	83.3%	64.2%	83.5%	77.8%	72.6%	68.4%	59.3%	43.7%

Continued

	Location		Province			
	Urban	Rural	North	East	South	West
Base	792	1,192	754	452	326	452
Struggling	0.3%	0.4%	0.1%	0.4%	0.6%	0.4%
Learning	16.5%	31.5%	28.5%	31.0%	30.7%	11.3%
Basic literacy	83.2%	68.1%	71.4%	68.6%	68.7%	88.3%

x) Mobile literacy – by district

	District						
	Overall	Bo	Bombali	Bonthe	Kailahun	Kambia	Kenema
Base	1,985	129	190	48	109	134	194
Struggling	0.4%	0.8%	0.0%	0.0%	0.0%	0.0%	1.0%
Learning	25.5%	23.3%	22.1%	31.2%	31.2%	26.1%	30.9%
Basic literacy	74.1%	76.0%	77.9%	68.8%	68.8%	73.9%	68.0%

Continued

	District						
	Koinadugu	Kono	Moyamba	Port Loko	Pujehun	Tonkolili	Western Area
Base	162	148	49	175	99	94	452
Struggling	0.0%	0.0%	0.0%	0.6%	1.0%	0.0%	0.4%
Learning	38.3%	30.4%	46.9%	24.6%	31.3%	36.2%	11.3%
Basic literacy	61.7%	69.6%	53.1%	74.9%	67.7%	63.8%	88.3%

xi) Please tell me what types of information you would like to get for you and your family.  
– by gender, age, location and province

	Gender			Age					
	Overall	Male	Female	15–24	25–34	35–44	45–54	55–64	65+
Base	2,499	1,232	1,268	813	609	445	260	181	192
Agriculture	69.8%	70.2%	69.3%	64.0%	70.8%	70.1%	78.5%	72.9%	76.0%
Health	85.5%	83.5%	87.5%	82.8%	86.0%	86.3%	89.2%	84.5%	89.6%
Sports	25.9%	32.5%	19.5%	30.9%	29.9%	24.0%	19.2%	12.6%	18.2%
News/current affairs	43.7%	46.6%	40.9%	42.3%	46.0%	42.5%	48.1%	37.9%	45.8%
Education	65.8%	66.9%	64.6%	68.9%	65.5%	64.7%	71.5%	54.7%	58.0%
Electricity	29.7%	30.4%	28.9%	30.3%	30.1%	31.2%	31.3%	21.0%	27.6%
Water	46.3%	45.4%	47.3%	44.3%	49.4%	47.4%	46.2%	41.4%	47.4%
Road/transportation	44.4%	44.1%	44.8%	43.2%	45.0%	48.5%	48.3%	38.1%	38.5%
Religious information	47.6%	48.3%	46.9%	45.4%	47.1%	46.7%	52.3%	45.6%	55.7%

Continued

	Location		Province			
	Urban	Rural	North	East	South	West
Base	864	1,636	883	600	542	474
Agriculture	38.8%	86.1%	89.6%	71.3%	78.0%	21.5%
Health	82.4%	87.1%	90.2%	88.3%	78.1%	81.6%
Sports	29.1%	24.2%	33.4%	23.9%	8.5%	34.4%
News/current affairs	45.3%	42.9%	46.8%	47.6%	33.0%	45.1%
Education	62.5%	67.5%	76.0%	64.6%	58.7%	56.3%
Electricity	31.2%	28.8%	28.3%	39.6%	21.2%	29.5%
Water	44.7%	47.2%	52.4%	50.9%	31.1%	46.8%
Road/transportation	28.9%	52.6%	52.7%	53.3%	40.0%	22.6%
Religious information	45.4%	48.7%	54.1%	50.1%	36.5%	44.9%

xii) Please tell me what types of information you would like to get for you and your family? – by district

	District						
	Overall	Bo	Bombali	Bonthe	Kailahun	Kambia	Kenema
Base	2,499	228	206	71	181	135	249
Agriculture	69.8%	74.1%	88.4%	72.9%	87.8%	85.2%	70.7%
Health	85.5%	66.2%	97.1%	87.3%	95.1%	95.6%	89.1%
Sports	25.9%	8.3%	45.4%	4.2%	15.5%	28.9%	23.7%
News/current affairs	43.7%	34.2%	59.2%	4.2%	34.8%	52.6%	50.8%
Education	65.8%	53.5%	78.6%	66.2%	64.6%	66.7%	65.5%
Electricity	29.7%	18.9%	47.3%	16.9%	35.7%	3.0%	39.4%
Water	46.3%	18.9%	65.0%	39.4%	54.7%	25.2%	47.4%
Road/transportation	44.4%	27.6%	69.9%	62.0%	59.1%	16.3%	52.2%
Religious information	47.6%	23.2%	64.1%	32.4%	46.7%	50.0%	50.6%

Continued

	District						
	Koinadugu	Kono	Moyamba	Port Loko	Pujehun	Tonkolili	Western Area
Base	230	169	112	176	131	137	474
Agriculture	87.4%	55.0%	75.9%	95.4%	89.3%	91.2%	21.5%
Health	76.5%	79.9%	71.4%	97.7%	100.0%	87.6%	81.6%
Sports	16.5%	33.1%	3.5%	37.5%	16.0%	42.3%	34.4%
News/current affairs	14.3%	56.8%	6.2%	70.9%	70.2%	46.7%	45.1%
Education	78.7%	62.9%	52.2%	71.0%	68.7%	83.2%	56.3%
Electricity	18.7%	43.8%	24.1%	20.0%	25.2%	51.1%	29.5%
Water	51.3%	52.1%	43.8%	39.2%	36.6%	79.0%	46.8%
Road/transportation	57.0%	48.8%	44.6%	40.9%	45.0%	70.8%	22.6%
Religious information	36.1%	53.3%	31.2%	65.1%	65.6%	59.1%	44.9%

### xiii) Most popular radio stations by district

<b>Western Area (Base: 474)</b>	
Station	% of respondents who reported listening to this station
African Young Voices (AYV)	33.3
Radio Democracy	29.2
SLBC Freetown	23.0
Star Radio	22.2
Citizen FM	16.5
BBC Freetown	15.6
Culture FM	13.8
Radio Mount Aureol	10.4
Radio Tumac	10.3
Africa Independent Radio	9.9

<b>Bo (Base: 228)</b>	
Station	% of respondents who reported listening to this station
Kiss FM	53.1
SLBC Bo	26.8
Radio New Song	17.1
Star Radio	7
Africa Independent Radio	5.3
BBC Bo	3.9

<b>Bombali (Base: 206)</b>	
Station	% of respondents who reported listening to this station
Radio Mankneh	53.4
Radio Maria	42.2
African Young Voices (AYV)	34.5
SLBC Makeni	28.2
Africa Independent Radio	27.1
SLBC Freetown	24.3
Star Radio	21.8
Radio Sella	15.5
Radio Democracy	12.1
Skyy FM	11.7
Culture FM	11.7

<b>Bonthe (Base: 71)</b>	
Station	% of respondents who reported listening to this station
Kiss FM	73.2
SLBC Bo	28.2
Voice of Women Radio	26.8
BBC Bo	22.5
Radio MODCAR	14.1
African Young Voices (AYV)	12.9
Radio Bontico	9.9

<b>Kailahun (Base: 181)</b>	
Station	% of respondents who reported listening to this station
Radio Moa	37.0
SLBC Kailahun	36.5
Eastern Radio Kenema	22.1
SLBC Kenema	21.0
Star Radio	6.6
SLBC Freetown	6.1
Starline Radio	6.1
Kiss FM	4.4

<b>Kambia (Base: 135)</b>	
Station	% of respondents who reported listening to this station
African Young Voices (AYV)	68.1
Radio Kolenten	62.2
SLBC Freetown	33.6
Radio Democracy	33.3
Radio Barming	32.1
Culture FM	23.1
Sky FM	14.8
Star Radio	14.8
BBC Freetown	13.3
Radio Maria	12.6



<b>Kenema (Base: 249)</b>	
Station	% of respondents who reported listening to this station
Eastern Radio Kenema	51.8
SLBC Kenema	43.8
Starline Radio	35.3
Radio Nongowa	26.9
Radio Moa	17.3
Eastern Radio Tongo	14.1
Kiss FM	5.6

<b>Koinadugu (Base: 230)</b>	
Station	% of respondents who reported listening to this station
Radio Bintumani	53.0
SLBC Makeni	4.8
Radio Mankneh	4.3

<b>Kono (Base: 169)</b>	
Station	% of respondents who reported listening to this station
SLBC Kono	46.2
Eastern Radio Kono	39.4
Radio Moa	7.1
Africa Independent Radio	5.9
Star Radio	5.3

<b>Moyamba (Base: 112)</b>	
Station	% of respondents who reported listening to this station
African Young Voices (AYV)	40.2
Kiss FM	37.5
Radio MODCAR	25.7
SLBC Bo	19.6
SLBC Freetown	16.1
Star Radio	11.6
Radio New Song	7.1
Culture FM	5.3

**Port Loko (Base: 176)**

Station	% of respondents who reported listening to this station
African Young Voices (AYV)	78.9
SLBC Freetown	54.0
Africa Independent Radio	40.3
Radio Democracy	36.4
Culture FM	25.0
Star Radio	25.0
Radio Bankasoka	23.3
BBC Freetown	15.9
Sky FM	14.8
Radio Mankneh	13.1

**Pujehun (Base: 131)**

Station	% of respondents who reported listening to this station
Kiss FM	47.3
Radio Wanjei	29.0
Africa Independent Radio	12.1
Star Radio	7.6
SLBC Bo	5.3

**Tonkolili (Base: 137)**

Station	% of respondents who reported listening to this station
Star Radio	35.0
Radio Mankneh	32.1
SLBC Makeni	22.6
Radio Maria	21.0
African Young Voices (AYV)	20.4
Africa Independent Radio	20.4
SLBC Freetown	18.8
Kiss FM	16.7
Voice of Kunike	13.9
Radio MODCAR	13.1
SLBC Magburaka	10.2

## Annex 2

# Methodology and limitations

BBC Media Action commissioned a quantitative survey in Sierra Leone in order to understand more about mobile phone usage, habits and information needs, as well as access to other forms of media. The survey used a nationally representative sample of 2,499 adults aged 15 and above, drawn from all 14 districts in Sierra Leone, with face-to-face interviews conducted in September and October 2015.

BBC Media Action used the Population Reference Bureau data from 2015 to estimate the number of people aged 15 and over in the country and then weighted the survey using data from the 2004 Population and Housing Census. Provisional results from the 2015 Population and Housing Census were released on 31 March 2016, with final results due to be published in December 2016.

BBC Media Action commissioned a Sierra Leonean research agency (Nest Builders International) to administer the face-to-face surveys using trained interviewers who were fully briefed by the agency and BBC Media Action prior to the fieldwork. National data are presented with  $\pm 3\%$  margin of error and, unless otherwise reported, the base is 2,499. Any differences in findings between subgroups discussed in this report are statistically significant.

### Demographics

Table A2.1: Demographics of survey sample, post-weighting

	n	%
Gender		
Male	1,232	49.3
Female	1,267	50.7
Age		
15–24	813	32.5
25–34	609	24.4
35–44	445	17.8
45–54	259	10.4

### Continued

55–64	181	7.2
65+	192	7.7
Region		
Northern	884	35.4
Eastern	599	24.0
Southern	542	21.7
Western	474	19.0
Location		
Urban	864	34.5
Rural	1,636	65.5

### Limitations

While every effort has been made to ensure that the data collected is robust, social desirability may have played a part in some participants' responses. As with all face-to-face survey methodologies, there is the risk that the presence of an interviewer (as opposed to a self-administered questionnaire) may have an impact on respondents' answers, causing them to provide what they perceive to be more 'socially desirable' responses. BBC Media Action took several steps to limit the possible impact of any social desirability effect:

- In commissioning an experienced agency to conduct fieldwork, BBC Media Action was able to ensure well-trained and experienced interviewers were used, which was further supported by detailed, project-specific training.
- During the interviews respondents were assured of the confidentiality of their answers and were informed of their right to refuse to answer any question.

As with most research of this nature, it is not possible to attribute causality on the basis of correlation. This report contains findings primarily based on bivariate analysis (comparing the relationship between two variables) to investigate how responses to questions varied by certain demographics. Although this analysis can tell us which subgroups are more likely than another to have given a particular answer, it is not sufficient to establish the cause of this association. For example, although a higher level of education is associated with an increased likelihood of a respondent reporting use of social messaging services, bivariate analysis is not enough to say that higher levels of education are necessarily the cause of this increased likelihood.

# Endnotes

1. This survey was conducted in late 2015 among a nationally representative sample of Sierra Leoneans aged 15 years and above. For further methodological details see Annex 2. Findings in this report are primarily based on data from this 2015 survey. Where relevant, data from a basic media access survey conducted in 2013 is drawn on for comparison.
2. Morris, L. (2016) *Media Landscape Report: Sierra Leone*, commissioned and compiled by BBC Media Action. These stations are: Sierra Leone Broadcasting Corporation (SLBC), African Young Voices (AYV), Star TV, Kedar Faith TV and Destiny Television. As far as the authors are aware, only the first three of these are broadcasting at the time of publication.
3. Prices for DSTV packages vary between US\$12 and US\$88 per month.
4. Morris, L. (2016) *Media Landscape Report: Sierra Leone*, commissioned and compiled by BBC Media Action.
5. Data used in all figures, graphs and tables in this report is drawn from the 2015 survey, unless otherwise stated.
6. Morris, L. (2016) *Media Landscape Report: Sierra Leone*, commissioned and compiled by BBC Media Action.
7. Ibid.
8. Ibid.
9. Mytton, G. (2008) *2008 Media Use Survey Sierra Leone: Final Report*. Fondation Hirondelle and Unicef.
10. Ibid.
11. This comparison is made between 18–25-year-olds in 2008 and 2015, and not between 15–24-year-olds as elsewhere in the report, in order to be consistent with the data collected in 2008.
12. For more detail on Sierra Leoneans' radio listening habits by region and district, see Annex 1.

13. For the purposes of this analysis, Western Area Urban and Rural are combined.
14. Weighted to latest available census data at the time of the survey, which showed the rural population at 65%.
15. For further details on the most popular stations by district, see Annex I.
16. Focus 1000 (2015) *KAP 4: Preliminary findings* [online]. Available from: [www.focus1000.org/index.php/downloads-resources/summary/4-ebola-kap-study/32-kap-4-preliminary-findings](http://www.focus1000.org/index.php/downloads-resources/summary/4-ebola-kap-study/32-kap-4-preliminary-findings) [Accessed 29 February 2016].
17. References to 'TV' in this section refer to broadcast TV as well as content available on DVD.
18. As far as the authors are aware only the first three of these are broadcasting at the time of publication.
19. World Bank (2015) *Databank – Sierra Leone* [online]. Available from: <http://data.worldbank.org/country/sierra-leone> [Accessed 29 February 2016].
20. Morris, L. (2016) *Media Landscape Report: Sierra Leone*, commissioned and compiled by BBC Media Action.
21. Of the 15–24 age group 13% per cent do not listen to the radio at all, compared to 9% of people aged between 25–64 and 10% among those who are 65+.
22. See Statistics Sierra Leone (SSL) and ICF International (2014) *Sierra Leone: Demographic Health Survey* [online]. Available from: <http://dhsprogram.com/pubs/pdf/FR297/FR297.pdf> [Accessed 29 February 2016].
23. Forty-six per cent of mobile phone owners BBC Media Action surveyed had a radio function on their phone.
24. See: Airtel (2016) About Bharti Airtel [online]. Available from: [www.airtel.in/about-bharti/about-bharti-airtel](http://www.airtel.in/about-bharti/about-bharti-airtel) [Accessed 29 February 2016]. It should be noted that Airtel in Sierra Leone is shortly to be purchased by Orange (13 January 2016) Orange to acquire Airtel's subsidiaries in Burkina Faso and Sierra Leone. Available from: [www.orange.com/en/Press-and-medias/press-releases-2016/Orange-to-acquire-Airtel-s-subsidiaries-in-Burkina-Faso-and-Sierra-Leone](http://www.orange.com/en/Press-and-medias/press-releases-2016/Orange-to-acquire-Airtel-s-subsidiaries-in-Burkina-Faso-and-Sierra-Leone) [Accessed 29 February 2016].
25. See: Africell (2014) About us [online]. Available from: [www.lintel.com/#/](http://www.lintel.com/#/) Holding [Accessed 29 February 2016].

26. See: telecompaper (2014) *Smart Telecom re-launches mobile services in Burundi* [online]. Available from: [www.telecompaper.com/news/smart-telecom-re-launches-mobile-services-in-burundi--1009268](http://www.telecompaper.com/news/smart-telecom-re-launches-mobile-services-in-burundi--1009268) [Accessed 9 March 2016].
27. See: Oanda online currency converter [Accessed 9 March 2016].
28. Roberts, G. (2015) *Mobile Technology Landscape Report*, commissioned by BBC Media Action.
29. Ibid.
30. Accessing 1MB of data via fibre optic connections costs around US\$88 per month. Accessing 20MB of data via mobile internet – through a phone or small modems (popularly called ‘dongles’) – is a fraction of that cost, around US\$1 per week. Faster landline connections cost between US\$35 and US\$140, depending on the amount of data and chosen speed of the connection. See: Roberts, G. (2015) *Mobile Technology Landscape Report*, commissioned by BBC Media Action.
31. In the survey, BBC Media Action also asked about 2go, Yahoo Messenger, Tango, Viber, Imo and Skype.
32. More precisely, the figure refers to the rounded number of accounts that have been active within the previous month. Figures are sourced from Facebook Audience Insights [Accessed 28 April 2016].
33. Phone data is based on how frequently respondents reported using their phone in the previous week.
34. UN Women (2002) ‘Participation and access of women to the media, and their impact on and use as an instrument for the advancement and empowerment of women’. Expert Group Meeting, United Nations Economic and Social Commission for Western Asia (ESCWA), Beirut, Lebanon, 12–15 November 2002 [online]. Available from: [www.un.org/womenwatch/daw/egm/media2002/](http://www.un.org/womenwatch/daw/egm/media2002/) [Accessed 29 February 2016].
35. Gillwald, A., Milek, A. and Stark, C. (2010) *Gender Assessment of ICT Access and Usage in Africa*, Volume One 2010, Policy Paper 5 [online]. ResearchICTAfrica.net. Available from: [www.ictworks.org/sites/default/files/uploaded\\_pics/2009/Gender\\_Paper\\_Sept\\_2010.pdf](http://www.ictworks.org/sites/default/files/uploaded_pics/2009/Gender_Paper_Sept_2010.pdf) [Accessed 29 February 2016].
36. Antonio, A. and Tuffley, D. (2014) Review: The Gender Digital Divide in Developing Countries. *Future Internet*, 6, 673–87.



37. Myers, M. (2004) Education and developmental radio for rural women: understanding broadcasters and listeners in a case study of Eritrea. Unpublished MA thesis, Reading University, UK.
38. Khan, F. and Ghadially, R. (2009) Gender-differentiated impact on minority youth of basic computer education in Mumbai city. *Gender Technology and Development*, 13(2), 245–69.
39. Those using social messaging included any respondents who reported that they used their phone for social messaging (13%).
40. See Statistics Sierra Leone (SSL) and ICF International (2013) Sierra Leone: Demographic Health Survey. Available from: [www.dhsprogram.com/what-we-do/survey/survey-display-450.cfm](http://www.dhsprogram.com/what-we-do/survey/survey-display-450.cfm)
41. The overall survey bases are shown in each table, although base per question varies slightly.
42. Includes any responses related to making calls: to deal with urgent tasks/chores using calls; casual chatting whenever there is free time using calls; calling an audio information service to get news, sports updates or other information; to interact with TV shows or radio shows.
43. Includes any responses related to sending SMS: to deal with urgent tasks/chores using text messages; casual chatting whenever there is free time using text messages; getting news (current affairs), sports headlines or information about other topics through text messages; to interact with TV shows or radio shows.
44. Includes any responses related to using social messaging: to chat to family, to get news or other information; to interact with TV shows or radio shows.
45. Includes any responses related to making calls: to deal with urgent tasks/chores using calls; casual chatting whenever there is free time using calls; calling an audio information service to get news, sports updates or other information; to interact with TV shows or radio shows.
46. Includes any responses related to sending SMS: to deal with urgent tasks/chores using text messages; casual chatting whenever there is free time using text messages; getting news (current affairs), sports headlines or information about other topics through text messages; to interact with TV shows or radio shows.
47. Includes any responses related to using social messaging: to chat to family, to get news or other information; to interact with TV shows or radio shows.
48. Categories based on participants' responses to whether they need assistance to use the mobile phone.



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