

Research Brief

# We're Still Listening: A Survey of the Media Landscape in the Accessible Areas of South Sudan in 2015



**Who** Forcier Consulting, contracted by Internews as part of the USAID-funded i-STREAM media development project in South Sudan

**What** An audience and media landscape survey drawing on 3,710 observations

**Where** The accessible areas of all 10 (former) states of South Sudan

**When** Accessibility assessment conducted March 2015. Fieldwork conducted April 1-25, 2015

**Why** To understand media access and consumption across the country



67% say radio reduces conflict.

Regardless of media access, radio broadcasts are thought to help reduce conflict and provide vital safety information.

South Sudan is the world's youngest and most fragile country and its media landscape reflects these challenges.

A recent survey commissioned by Internews sets out to collect information on South Sudanese media access and consumption to inform the strategies and programming of media houses and media initiatives.

This study is the first detailed analysis of the media landscape in South Sudan since the wide-scale conflict began in December 2013.

This survey does not purport to be nationally representative, but rather, is representative of the population that could be safely accessed in April 2015.

One thing has not changed: Radio remains the most commonly accessed form of media and is a primary source of news and information.

This research brief offers an overview of the study and its key findings.

The full report is available online [here](#).



## + Key Findings

While many have limited or no access to media, radio is undisputedly a main source of news and information for most South Sudanese

### What are the benefits of increased access to media?

Radio provides information that helps to keep listeners safe and to be more understanding of other groups of people. In addition, radio is widely perceived as a means of conflict reduction.

**Regardless of media access, radio broadcasts are thought to help reduce conflict and provide vital safety information.**

Far more respondents say radio broadcasts can help reduce conflict (67%) than those who say it can increase conflict (5%).

As it is possible that such information is received second-hand, these questions

were posed to all respondents, regardless of whether they previously stated they were able to access a radio. Over half (53%) of respondents who have never had access to a radio feel that radio broadcasts can help reduce conflict. These findings indicate that even those without media access can benefit from information communicated via radio.

**Information heard on the radio trickles down to reach beyond listeners.**

Nearly two-thirds (63%) of respondents say information from the radio has helped them to stay safe, regardless of whether they have regular access to a radio.

**As media access increases, trust in**

**radio as a source of information also increases.**

Individuals who have never had access to media say they trust religious leaders (25%) or face-to-face conversations with friends or family (21%) the most as sources of information, while individuals with high access to media trust the radio (69%) the most.

**Those with media access tend to choose radio as their source of news and information, even if they have access to other forms of media.**

Individuals with a high level of access to media tend to prefer getting their news and information from the radio (70%).

Television viewers tended to view radio as a main source of information (64%) more than non-viewers (32%). Weekly internet users still typically turn to the radio (62%) as a main source of news and

information more frequently than the internet (10%). Likewise, weekly newspaper readers turn to radio (68%) as a main source more often than newspapers (7%).

**What types of media are accessible in South Sudan?**

Physical access to technology is a major barrier or enabler to consumption per medium, which is reflected in relative reach rates. Most people in the areas sampled do not have consistent access to media. For those who do, radio is their primary media source. Due to both limited access and limited literacy, newspapers and internet are of extremely limited relevance as information sources for most respondents.

**Access to television, newspapers, and internet remains sparse.**

Just one-quarter (24%) of respondents have ever watched television, with a national weekly reach of 13%. Just 1 out of 5 (18%) respondents have ever read a newspaper, with a national weekly reach of 10%. Fewer than 1 in 10 (9%) respondents have ever used the internet, with national weekly reach (usage) of 7%.

**Mobile phone penetration levels are nearing levels of radio access.**

As mobile phones are devices, not a type of media in and of themselves, rates of access are measured as penetration: people either have

access to a mobile phone or they do not have access, regardless of the frequency of using it.

Overall, 44% of respondents have access to a mobile phone: three out of ten (31%) respondents have their own mobile phone and 13% have access to the phone of someone close to them such as a friend or relative.

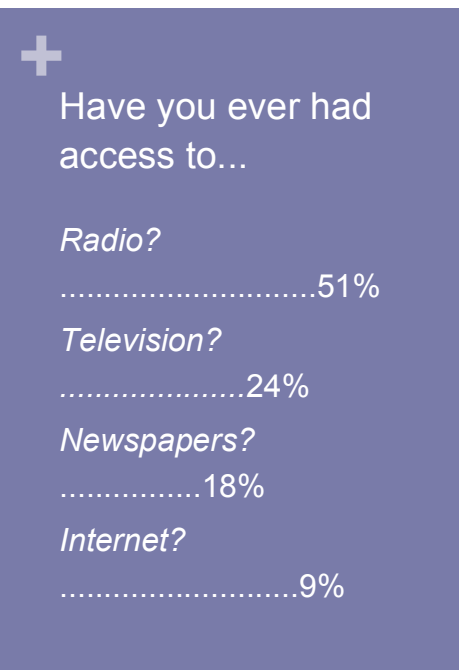
**69% of respondents with access to multiple types of media trust the radio more than television, newspapers, and the internet.**

**Who has access to media?**

**There is a sizable number of people who have never had access to any form of media or device.**

Roughly one in three (34%) of respondents have never had access to radio, television, newspapers, internet, or mobile phones. Furthermore, media is less accessible for women than it is for men. It is more common (39%) for women to never have had access to any type of media than for men (26%).

**The gender gap in media access in South Sudan persists with media of any type being generally less accessible for women than it is for men.**



It is more common for women to have never had access to media than men.



Men (59%) are more likely than women (45%) to have listened to a radio. Men are more likely (50%) to have mobile phone access (their own or that of someone close to them) than women (39%). Men (31%) are almost two times more likely to have watched television than women (18%). Men (14%) are more likely to have used the internet than women (5%). Men are much more likely (26%) than women (13%) to have read a newspaper. Adult women, and especially those with low socio-economic indicators, rarely have access to media.

**Greater levels of media access are associated with more favorable socio-economic indicators and higher education levels.** It is more common for respondents who have paid, regular jobs to have a high level of access to media (36%) than for respondents who are unemployed to have a high level of access to media (8%). Similarly, those with discretionary money are significantly more likely to have access to all types of media (61%) than those with no discretionary money (6%).

44% have access to a mobile phone.

These rates of penetration among South Sudanese respondents are nearing radio.

Respondents who have not received a formal education are much more likely to have no access to any types of media (53%) than those with at least some education (14%). Just 2% of those with no education have a high level of access to media.

## Conclusion

As in 2013, it is apparent that the media sector in South Sudan has a diverse audience whose information needs are both widespread and localized. The gaps in access and ongoing conflict are just some of the obstacles the media sector must overcome.

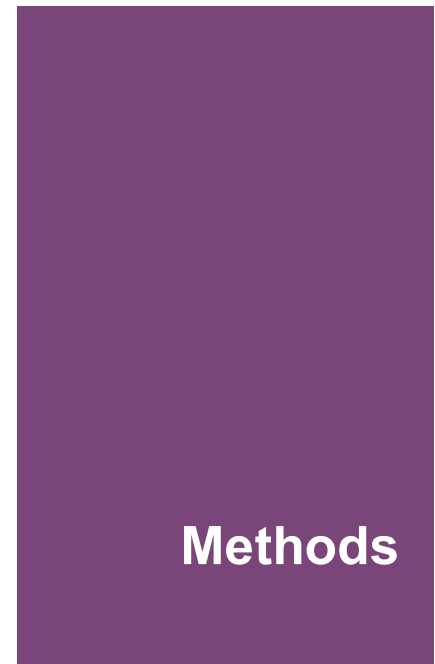
In general, the relatively urban areas have the highest rates of media access. This disparity means that many parts of the country still lack avenues to timely and reliable information.

Levels of access to media in South Sudan also reflect gender, education, and socio-economic disparities. In particular, women have less access than men to all types of media. Women are less likely to have ever accessed radio, television, internet, or newspapers than men.

Education, which is generally less common for women than men, is also a factor in media access. Those without education have less access to all types of media than those with at least some education.

Socio-economic indicators are also tied to media access: those who are financially insecure have less access to all types of media than those who are relatively more financially secure.

Taken together, these findings suggest that increased access to education and higher levels of financial security would increase media access. Therefore it is especially important for media and other development initiatives to explicitly address gender disparities when seeking to improve programming or access to media.



## Methods

### Surveying a volatile media environment

Internews, as implementer of the USAID i-STREAM media project, commissioned Forcier Consulting to follow up the 2013 National Audience Survey in order to build on the valuable information previously collected and to contribute to the media sector as a whole. However, the volatile events of December 2013 drastically altered the security situation

throughout the nation, rendering many areas inaccessible to field teams.

As a fully nationally representative sample was simply not possible, a more realistic approach was to design a probability proportional to size (PPPS) sampling strategy that covered the accessible population of the country. The sampling frame was

stratified by state, permitting analysis at the state level as well as nationally.

Overall, 20 field researchers, 15 field team leaders, and 118 enumerators participated in the collection of 3,710 observations. After extensive training, enumerators conducted face-to-face interviews via Computer-assisted Personal Interviewing (CAPI) with adults aged 15 and older.

### Limitations

Due to the conflict, it was not possible to include all areas of the country in the sample frame. This survey is **representative of the population that could be safely accessed as of the time of fielding.**

Given the varying degrees of accessibility, findings must be contextualized by accessibility when considered at the state-level. States that were fully accessible can be

considered representative at the state-level, while partially accessible states are representative only of the accessible subpopulations.

The national findings presented in this report may be influenced by the partially accessible states, which tended to be more urban.

Readers are encouraged to view the full report [here](#) for more details.



## About Forcier Consulting

Forcier Consulting is a development research firm that operates in post-conflict environments. Established in 2011 in South Sudan, Forcier Consulting has invested in developing methodologies and approaches to research that are contextually appropriate and feasible, whilst adhering to international standards for social science research and utilizing the latest data collection technology available. Our core services include population and social science research, project evaluations, market assessments for livelihoods and vocational trainings, private sector and market research for feasibility studies, strategic planning and representation, and training capacity building workshops.

For more information on this study, please contact:

Hayley Umayam  
Senior Engagement Manager  
Forcier Consulting  
[hayley@forcierconsulting.com](mailto:hayley@forcierconsulting.com)



## About Internews

Internews, a non-profit media development organization, has been working in what is now South Sudan since 2006, building some of the first community radio stations in the country, and providing communities in remote, information-poor areas with vital access to news and information in local languages. Now, with up to 2.2 million South Sudanese displaced by conflict, access to reliable and trustworthy information can be the difference between life and death. Ensuring information is produced by the local community for the local community, and in a language and dialect they understand, has been essential to ensure information exchange is two-way and effective. Internews continues to build and strengthen independent media in South Sudan through the funding of the United States Agency for International Development (USAID) and other donors in several areas including: community radio, Eye Radio, professional training, media law and advocacy, grants to local partners, humanitarian information, and research.

All photos courtesy of Internews

