The Business Environment for News Media in Zimbabwe: 2021

A report to Internews

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List of Abbreviations

AIPPA	Agence France-Presse/French International News Agency
AIZ	Amnesty International Zimbabwe
BAZ	Broadcasting Authority of Zimbabwe
BSA	Broadcasting Services Act
CRIs	Community Radio Initiatives
ETV	First private free-to-air television station, South Africa, with streamed content
FOA	Freedom of Information Act
IBRA	Independent Broadcasting Regulatory Authority
ITU	International Telecommunication Union
MAZ	Media Alliance of Zimbabwe
MM	Media Monitors
MISA	Media Institute of Southern Africa (MISA-Zimbabwe in Zimbabwe)
POSA	Public Order and Security Act
POTRAZ	Postal and Telecommunications Regulatory Authority of Zimbabwe
RSF	Reporters sans Frontières (Reporters Without Borders)
SABC	South African Broadcast Corporation
ZARF	Zimbabwe Advertising and Research Foundation
ZAMPS	Zimbabwe All Media and Products Survey
ZBC	Zimbabwe Broadcasting Corporation (state-controlled broadcaster)
ZMC	Zimbabwe Media Commission
ZACRAS	Zimbabwe Association of Community Radio Stations
ZIMSTAT	Zimbabwe National Statistics Agency
ZUJ	Zimbabwe Union of Journalists

Basic Data

Area	Population	Area (mi^2)
Zimbabwe	14,863,000 (2021 projected)	149,364
Bulawayo	~1,200,000*	659
Midlands	~1,615,000**	18,983
Matabeleland North	~750,000**	298,967
Matabeleland South	~684,000**	20,916

* Population estimates from the Bulawayo City Council; 2012 Census data estimated it at 653,000; GeoPoll estimates it at 618,000

** Population estimates from the 2012 Census and not subsequently updated

Overview

Before the Covid-19 pandemic stopped Zimbabwe in its tracks, the country faced severe economic challenges and had already seen devastating climate disasters. Repeated periods of extreme drought triggered food crises. Flooding and storm damage from Cyclone Idai (March 2019) devastated eastern parts of the country, wiping out crops, damaging infrastructure, and killing both people and livestock.[1]

Those crises, coupled with acute shortages of foreign currency and rampant corruption, led to double-digit declines in agriculture, and electricity and water supply production. In 2019, the currency depreciated, and the annual inflation rate soared to 737%. Food prices increased 725%. Wages could not keep pace.[2] Around 95 percent of people lived in the informal (and often sub-sistence) economy.[3]

The advertising market, slim at an estimated $152 million when last reported in 2015,[4] was largely captured by media organizations aligned with government interests and receiving state-funded advertising.

Currency woes and hyperinflation roiled the economy. To stabilize the currency, the government introduced the Real Time Gross Settlement (RTGS) dollar in early 2019 and used it as the currency standard until March of 2020. As the Zimbabwean currency devalued, citizens used other currencies to save and pay for their expenses. Yet each had differing exchange rates, which meant customers were charged different prices based on what payment method they used. The switch to the RTGS dollar, also known as the ZML, helped briefly stabilize the currency.

When the pandemic arrived, the government imposed a nationwide lockdown intended to slow the spread of the virus, but which heightened shortages of water and worsened the persistent lack of sanitation infrastructure. Millions of people lacked access to safe water, even in the capital of Harare, forcing them to stand in long lines for a small share. By March of 2020, it was estimated that 59 percent of rural households were food insecure.[5]

The economic impact of the pandemic – and the government's inadequate response – was tragic. In 2019, 40% of the country already lived in extreme poverty, double the level of 2011. Under the pandemic, this accelerated, with an estimated 54% of the country living in extreme poverty in 2020, many unemployed, and many still facing critical shortages of basics like food and water.[6] First hand reports indicate that the southern areas of the country remain among the hardest hit, with many households now headed by women as men have gone across the border to find work in neighboring countries.

Key economic segments, including tourism, agriculture, exports, and manufacturing, all suffered. In May 2020, Zimbabwe's government announced a ZW$18 billion (USD 49,737,496) Covid-19 economic rescue and stimulus package equivalent to 28.6% of the 2020 national budget. ZW$500 million (US$1,381,595) was set aside for SMEs (Small and Medium Enterprises) and MSMEs (Micro, Small, and Medium enterprises). The government recently announce it was setting aside US$1 million for the purchase of Covid-19 vaccines. This fund remains unaccounted for.

In January 2021, Open Parly, a parliament open data publication founded by youth-driven activism group Magamba Network, reported that the state intervention failed to reignite economic activity as delays in disbursement and economic fluctuations reduced uptake. Interest rates of 20%, cou-pled with soaring inflation, made taking out relief loans too risky for most businesses, especially as consumer spending withered and the economy declined for a third straight year. The value of the loans diminished the minute they were issued.[7]

The pandemic also triggered a decline in human rights. Government critics were abducted and tortured. The police and security forces committed arbitrary arrests and other abuses, including assault and torture. In July 2020, 60 people were arrested during anti-corruption protests. In May, two activists and a member of parliament were abducted while in police custody. They were sexually abused and assaulted by their abductors before being released, then arrested while being treated for their injuries for making allegedly false reports about their abduction.[8]

Journalists were also under attack. Police used the pretext of lapsed credentials to arrest journalists. In July, Mduduzi Mathuthu, editor of the online newspaper Zimlive, was targeted by security forces. His home was raided and – in his absence – his family was arrested and his nephew severely tortured.[9]

After investigating corruption allegations in the health ministry related to sourcing Covid-19 supplies, prominent journalist Hopewell Chin'ono was arrested three times within a six-month period. He was charged with inciting violence ahead of an anti-government protest in July 2020, obstruction of justice and demeaning the country's National Prosecution Authority in November, and for communicating falsehoods in January 2021 after reporting that a child had died as a result of a police beating during the lockdown.[10]

Amidst this, new laws regarding journalism and journalists were drafted (and one passed) repealing earlier ones. While the government claims that the new laws are less restrictive, in practice they have heavier penalties and severe restrictions, particularly regarding political reporting. The media market has expanded somewhat under these laws: the government issued new licenses for community and university radio stations which will expand reach of local news in local languages.

However, the path forward for funding these new media channels remains unclear. The cost to establish a broadcast television channel is prohibitive except to either well-heeled individuals or corporations. Media operators, understanding that access to broadcast channels is likely to remain beyond their reach, have instead turned to innovative digital channels using WhatsApp, bulk SMS, and social media to reach audiences on their cell phones.

The digital broadcast conversion, under a 2015 deadline set by the ITU, has not yet been fully implemented. Citing a lack of foreign currency and, thus, the inability to invest in equipment, the government has repeatedly missed subsequent deadlines and the process appears to have been stalled since 2018.[11]

However, at some point, this process will be complete. It will free up large swaths of the broadcast spectrum and expand telecommunications and access to digital media; Zimbabwe's news producers, already aggressively using digital platforms, will have the means to bypass traditional broadcast and print channels and directly reach wider audiences.

The Legal and Regulatory Environment for News Media Businesses

November 17, 2020 marked three years since the ouster of Robert Mugabe, the authoritarian dictator in charge of Zimbabwe for almost four decades. Government regulation of news media during that period stifled the media industry's growth and development. The administration ensured that media was largely held by pro-government actors.

People assumed, and hoped, that the change in power would result in positive changes for Zimbabwe. "Instead, cases of human rights violations, arrests and detainment of civic rights activists, corruption, economic demise, crumbling infrastructure and unemployment are once again making headlines."[12]

The environments for journalists, journalism, and independent media organizations also remain largely unimproved, despite some recent changes in legislation. Local daily newspapers and national broadcast media remain tightly controlled by the government and captured by its allies, leading to low trust in media. Consumers perceive news content to be subject to political manipulation.

Journalists continue to meet political intimidation and security threats in the line of duty: Reporters Without Borders (RSF) ranked Zimbabwe 126/180 in its pre-Covid 2020 World Press Freedom index. One of the contributing factors was a poor score reflecting abuse in the country. The ranking was up only two spots from the score received in 2017 when Zimbabwe was still under the rule of Mugabe, whom RSF regarded as "one of Africa's worst press freedom and media predators."[13]

While RSF acknowledges some encouraging milestones in its most recent survey (pre-Covid), it notes that threats to free media continue to exist. "Access to information has improved and self-censorship has declined, but many journalists were subjected to violence during the 2018 presidential elections, often by members of the security forces and sometimes by political activists. The security apparatus has not yet lost the habit of harassing journalists and acts of intimidation, verbal attacks and confiscation of equipment are all still standard practice," reads its Zimbabwe profile.[14]

Each of these situations has worsened during the Covid-19 pandemic.

The government has taken aggressive actions towards civil rights activists, journalists, and media organizations. Fledgling legislation, intended to liberalize the field, has walked backwards, or met with less than ideal implementation.

AIPPA Repealed, Sort Of.

A move perceived as positive under the current administration has been progress towards aligning media laws with the Constitution. This has led, in theory, to the repeal of the Access to Information and Privacy Protection (AIPPA) bill. While ostensibly an access to information law, it limited press freedoms and activities by making media accreditation extremely expensive.[15] Failure to register proper accreditation was sanctioned by a potential prison term. According to Takura Zhangazha, a media researcher, at the time of its enactment, "It's extortion. The Zimbabwe Media Commission is seeking to extort money from … media houses in an effort to fundraise for its oppressive legal mechanisms."[16]

AIPPA was repealed during 2020 and partially replaced with three bills, two of which are still

before Parliament. That said, in the absence of those laws being passed, local authorities are still using AIPPA's regulations as the de facto law and employing its most abusive language to restrict journalists. MISA Zimbabwe and MAZ have proactively reviewed and commented on the bills, as have international organizations. In general, they concur that the language of the Constitution is good in respect to press freedoms, but there still needs to be further reconciliation between the languages of the bills and the intent of the Constitution. Key provisions of these bills could be used to further repress journalism, journalists, and media organizations. Indeed, the organization Veritas, having reviewed the new regulations, concluded that "AIPPA was repealed, but the new regulations seek to maintain some of its odious aspects."[17]

Access to Information Bill *(Passed) (aka Freedom of Information Bill)*
The Act seeks to give effect to the constitutional rights on freedom of expression, media freedom, and access to information. Notably, however, the law has significant reach and bearing on media freedom, journalistic rights, media regulation, and the protection of privacy. This reach is so significant that multiple pieces of legislation are required as legislative reform/cure. Thus, the Access to Information Bill does not wholly repeal the AIPPA as the other proposed bills are still pending.[18] Local sources also note that rather than being based on the European data privacy laws (GDPR), it more closely models U.S. laws, including some of those put forth under the Trump administration that offer fewer privacy protections for individuals. Concerns exist that under current provisions, a person could face up to five years imprisonment if convicted of spreading false information on the internet, a penalty that would encourage self-censorship in one of the few spaces where citizens have relatively free access to information.

MISA Zimbabwe leader Tabani Moyo said the proposed law could lead to further attacks on journalists, as the government would have legal grounds to crack down on the freedom of expression. Speaking to VOA from Harare in November 2020, he said: "The attacks on the industry have been aggressive and we have seen the weaponizing of the law; the introduction of the Cyber Security Bill which seeks to snoop and empower the military to crackdown on expression. The heavy handedness on the media has been highly pronounced."[19]

Zimbabwe Media Commission Bill (ZMC) *(Bill Before Parliament)*
The Zimbabwe Media Commission was established under the nation's Constitution and is comprised of a chairperson and eight other members who are presidential appointees. It is notable that members were only appointed in 2020, seven years after the commission was established in the Constitution. Its main functions are articulated in Article 249:
- To uphold, promote and develop freedom of the media

- To promote and enforce good practices and ethics in the media

- To monitor broadcasting in the public interest and, in particular, to ensure fairness and diversity views broadly representing Zimbabwean society

Veritas notes that the law, in theory, provides a workable framework for the Commission to conduct its work. It adds this caveat, however: "Whether the Commission will promote or suppress freedom of expression, indeed, will depend not so much on the Bill as on the commissioners themselves. We hope they will live up to their task."[20]

The Article of the Constitution describes what the Commission will do. The bill, then, covers how it does its work. The Parliamentary Portfolio Committee on Information, Media and Broadcasting Services, tasked with reviewing the bill, presented its report on the bill to Parliament in March 2020. This was pursuant to public hearings held by the committee in October 2019. MISA and MAZ later compiled its findings.

The Committee recommended that the Zimbabwe Media Commission be stripped of powers to

investigate the conduct of media practitioners at its own instigation to minimize the possibilities of abuse of the Commission.

The Committee also concurred with citizens who submitted that the independence of the Commission should be guarded by ensuring that the minister's powers to interfere with its operations are removed. The independence of the Commission is guaranteed by the Constitution and ministerial interference would undermines its independence.[21]

The bill does, however, offer the possibility of co-regulation with representatives of the media industry. Section 249(1)(d) of the Zimbabwean Constitution states that it is the role of the ZMC to encourage the formulation of codes of conduct for persons employed in the media. This implies that the commission can delegate some of its regulatory powers.[22]

Thus, in its report to parliament, the Parliamentary Portfolio Committee on Information, Media and Broadcasting Services recommended that there should be a clause that creates a co-regulatory framework through the media council. Supported by both MISA and MAZ, this would be an important step in institutionalizing co-regulation. Those organizations have further proposed that the ZMC explicitly state that it incorporates co-regulation.[23]

Protection of Personal Information and Data Bill *(Bill before Parliament) (aka Cyber Security and Data Protection Bill)*

This bill, apparently designed to strengthen data protection, create provisions for cyber offenses, and promote a technology-driven business environment, has concerning provisions. Transparency International concludes that it "contains provisions that undermine the freedom of expression and freedom of the media that are codified in section 61 of the Constitution of Zimbabwe. Of major concern is Clause 164C, which criminalizes the spread of what the government classifies as false information online, punishable with a jail term of up to five years, or a fine, or both."[24]

Key provisions would likely have a chilling effect on whistleblowers and others seeking to expose corruption. They could also be used to charge journalists seeking to report on government or business affairs.

MISA Zimbabwe, in its analysis of the bill, found provisions with the potential to limit the exercise of media freedoms, be used by the state to suppress dissenting opinions, and potentially entrench government surveillance of its citizens.[25]

In the Absence of Passed Laws, Previous Ones Continue to be Enforced

As the latter two bills are not yet passed into law, officials have continued operating as though the earlier laws, despite being repealed, are still in effect. RSF has observed that "Zimbabwe has restricted press freedom more than any country in Sub-Saharan Africa" as recently as last August and cited continued attacks against journalists.[26] The government has also used the lack of updated laws to restrict journalists in unique ways during the Covid pandemic. At a time of profound economic downturn, and when people are locked down and ordered to restrict contact with others, the rates for journalists' accreditations have increased significantly, and journalists are required to make a physical visit to government offices to collect their credentials and deliver proof of payment.[27] This has allowed police to arrest journalists, as they did in Midlands in January 2021, for using expired accreditation cards.

This all comes at a time when journalists have been hard hit. A December 2020 study on Covid-19 and the media found that Zimbabwe's journalists were severely affected by the pandemic:

they experienced up to 60% pay cuts, little to no facilitation, no front-line worker status. These concerns have been amplified by increased anxiety about personal safety. Journalists are also reported to be experiencing mental health issues: "many journalists reported that governments did not accord them the status of front-line workers, although colleagues had lost their lives after visiting hospitals and quarantine facilities in a bid to bring the latest, in-depth news to the public."[28]

There has been concern about the categorization of accreditation licenses, as there was a proposal to have a special category for online journalists. This has been viewed as a way to further clamp down on the online space and impinge on the democratization of the online discourse.

Media Licensing and Fees

Business licenses and licensing fees take diverse forms and exist for legitimate reasons. From a macro perspective, businesses of all types are legally registered so that they are visible to tax and oversight authorities. Similarly, individuals are licensed or accredited as professionals in certain fields (i.e., doctors, electricians, accountants) to ensure that they meet standards of professional competence or are authorized to work in a specific field.

In the media context, it is typical for news media organizations to require and pay for a state-granted license if using part of the broadcast spectrum allocation for distribution, typically either free-to-air television, radio, or telecommunications. The spectrum is a public good and is limited; its allocation is often governed by an independent broadcast regulatory authority (IBPR) such as the Australian Communications and Media Authority (ACMA), the Federal Communications Commission (FCC) in the United States, or Ofcom in the U.K. It is also common, in many countries, for households to be charged an annual license fee to access live, or recorded broadcasts from public service media that offer content in ad-free or low-ad environments. Countries as diverse as Albania, France, Japan, Serbia, and Zimbabwe charge these types of fees.

Zimbabwe's digital broadcast conversion process, which was scheduled to be completed in 2015 but has yet to be fully implemented, will bring significant benefits.

In Kenya, that process (begun in 2006 and concluded in 2015) harmonized Kenya's broadcasting spectrum to international standards and optimized the spectrum, freeing up significant additional bandwidth. As a result, the total market for broadcast media grew. Kenya experienced a rapid expansion of programming broadcast using vernacular languages; the population covered by televisions grew from 55% to 66%; the number of broadcasters increased from 14 to 65; and the number of broadcasters reaching multiple cities grew from 2 to 22.

The "digital dividend" (additional bandwidth freed for use resulting from the spectrum being optimized) enabled telecom operators to expand throughout the country.

However, from a business perspective, it is unusual in competitive media markets to require unique licenses to operate news media businesses unless they are allocated part of that broadcast spectrum.

There is no scarcity of distribution channels outside the spectrum; one must only consider the near-infinite options available in digital environments. Thus, efforts to license news media are often attempts to limit content providers, constrain or censor content, or diminish media plurality, diversity, and – too often – localism. Licensing can also be used to induce self-censorship among media and journalists.

Yet the Zimbabwe media market requires licensing at many tiers of the media ecosystem. Print publications are licensed, and in the broadcast environment, fees are often prohibitively expensive for any other than the largest players. The cost of acquiring and maintaining a broadcast media license is among the highest in the region, where Zimbabwe is one of the poorest economies. For instance, to maintain a national radio license, a company pays an annual fee of USD$1000 and is required to pay 2% of its national income to the government.[29]

Journalists are required to have current accreditation documents which also incur fees. Although MISA Zimbabwe views accreditation as a proactive step in identifying and, thus, protecting journalists, it also decries the fees they must pay, especially considering recent increases during the pandemic. Fees increased from ZWD$120 to ZWD$600 for a first application, and from ZWD$80 to ZWD$500 for renewal.[30]

Cost increases have also been pushed down to consumers and businesses. Those groups were informed, during the pandemic and economic crisis, that they would have to pay up to five-times more for their licenses to view or listen to broadcast media – the second such move in the span of a year.

In addition to paying for household access, citizens pay license fees to use car radios, which have also been subject to increases. As reported in The Herald, "ZBC has hiked radio and television license fees with motor vehicle radio license fees rising to [ZBM]$450 from $300 per term. A radio license for a household is now $75 per quarter in rural areas, up from $25, and $225, up from $50 for urban areas. Companies will pay $625 per term for car radio licenses, up from $600 while businesses with television sets will have to pay $1,125 per term from $1000."[31]

New Broadcast Licenses Authorized

Despite the president's past track record of restricting them, the Mnangagwa administration promised during its early days that it would advance press freedoms. In a welcome change following decades of curtailment, Zimbabwe's government, through its Broadcast Authority (BAZ), expanded access to media licensing during 2020 and in early 2021. Six free-to-air television licenses were issued in November 2020 while eight applications were unsuccessful. The fee structures for broadcast and radio made it difficult for organizations not aligned to the government to obtain them. The recipients of the television licenses were widely thought to be sympathizers of the ruling party, Zanu PF, and companies linked to the military. Examples include ZTN which is controlled by the state; Rusungiko Media, controlled by the National Army; and Acacia Media owned by Sharon Mugabe, a relative of the former president and a failed Zanu PF primary 2008 election candidate.

The Zimbabwe Broadcasting Act (2016) mandates the Broadcasting Authority of Zimbabwe to give reasons when applications for licenses are not approved. The eight unsuccessful applicants were reportedly not given reasons why they did not receive licenses.

This failure to honor a legal mandate by the BAZ is possibly an indicator that the issuance of the licensees was not done in accordance with the law and due process but rather based on political expediency. "It is pluralism without diversity because the new owners are there to further entrench media concentration rather than amplifying marginalized voices," noted Admire Mare, from the Namibia University of Science and Technology.[32]

He also noted that unsuccessful applicants like Heart and Soul Television are already broadcasting via the internet. Broadcast television is unlikely to be feasible for independent content producers. "They should continue with online television because digital platforms are the future of television," says Mare.[33]

To those companies whose licenses were not approved, Ncube says they should not lose heart but, move onto an online platform.

Meanwhile, BAZ further expanded its licensing in February 2021, announcing that it would open the airwaves in three categories: free-to-air national commercial television (6 licenses), free-to-air community radio (10), and on-campus radio stations (19). These expansions will help reach populations with limited access to digital media and those who speak in various dialects: Zimbabwe has sixteen official languages. Campus radio stations are intended to be used for training students in broadcasting and media.

> "I do not see anyone not close to the regime being awarded any broadcasting license. The regime is fixated with stifling media freedom, freedom of expression and access to information, hence, its penchant to dole out broadcasting licenses to its functionaries."
>
> *– Njabulo Ncube, Zimbabwe National Editors Forum*
> *The Africa Report[34]*

To apply for the new licenses, interested parties pay an application fee and, if approved, an additional annual license fee. Those range from ZWD 17,000 for a community radio license (about USD $47) to ZWD $306,000 (about USD $846) for a national commercial license.[35]

During January and February 2021, BAZ authorized three community radio licenses to the Mbembesi Development Trust, the Ntepe-Manama Community Radio Trust, and the Nyangani Community Radio Trust. In February 2021, the Ntepe-Manama group announced that it had paid its licensing fees through 2030 and is now setting up its broadcast operations. It already operates using podcasts, WhatsApp, bulk SMS, Twitter, Facebook, and YouTube.[36]

This expansion reflected strong local, regional, and international cooperation. ZACRAS (the national advocacy platform for community radio), in conjunction with Amnesty International Zimbabwe, and with help from the United Nations Democracy Fund, were strong advocates for sector reform, including extending radio broadcasts to primary and secondary schools, essential during the Covid-19 pandemic. One immediate effect of this expansion will be to make news more widely and affordably available in local vernacular languages. The role of community radio institutions – operating using diverse distribution channels on social media – has been important during the pandemic. Most were able to cascade government communications on the virus and pandemic using local languages.[37]

Concerns remain about the financial viability of these stations given the extreme poverty in many Zimbabwean communities, and particularly since there is unclear wording in the rules regarding whether they can receive commercial revenue.

Outside the broadcast environment, the Zimbabwean government has also newly applied fees to international content providers. In September, Facebook began charging international advertisers VAT tax on ads placed in Zimbabwe. In February, Netflix announced to its Zimbabwean subscribers that starting March 5, 2021, a value-added tax (VAT) would be added to their monthly subscription fees, increasing the price by $1 per month or 12.5%.[38]

Internet Access

While broadcast channels are expanding, the switch to digital channels is well underway, although use is constrained by data costs that are high in relation to incomes. In January 2021, Hootsuite reported that 98.4% of the Zimbabwean population has mobile connections, and 33.4% have access to the internet. The majority of internet users, 59.9%, access web pages using mobile phone connections.[39] During the pandemic, this has been an important communication channel for disseminating information about the virus and various health alerts.

Jan 2021 — Zimbabwe
Essential headlines for mobile, internet and social media use
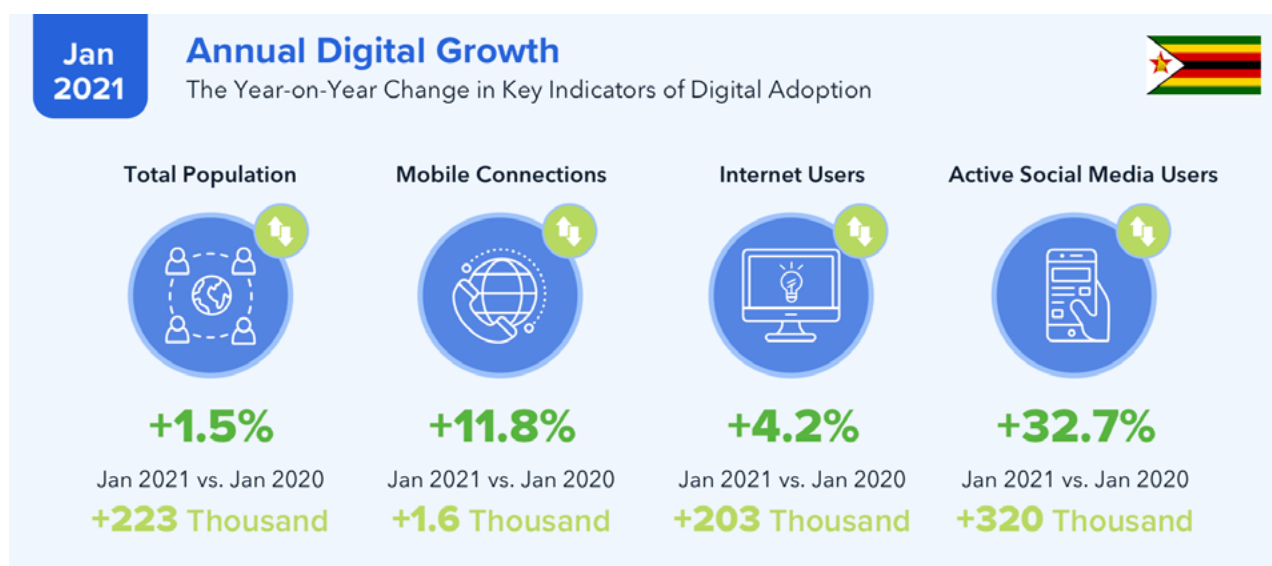
Total Population	Mobile Connections	Internet Users	Active Social Media Users
14.98 Million	**14.76** Million	**5.01** Million	**1.30** Million
Urbanisation: **32.3%**	vs. Population: **98.5%**	vs. Population: **33.4%**	vs. Population: **8.7%**
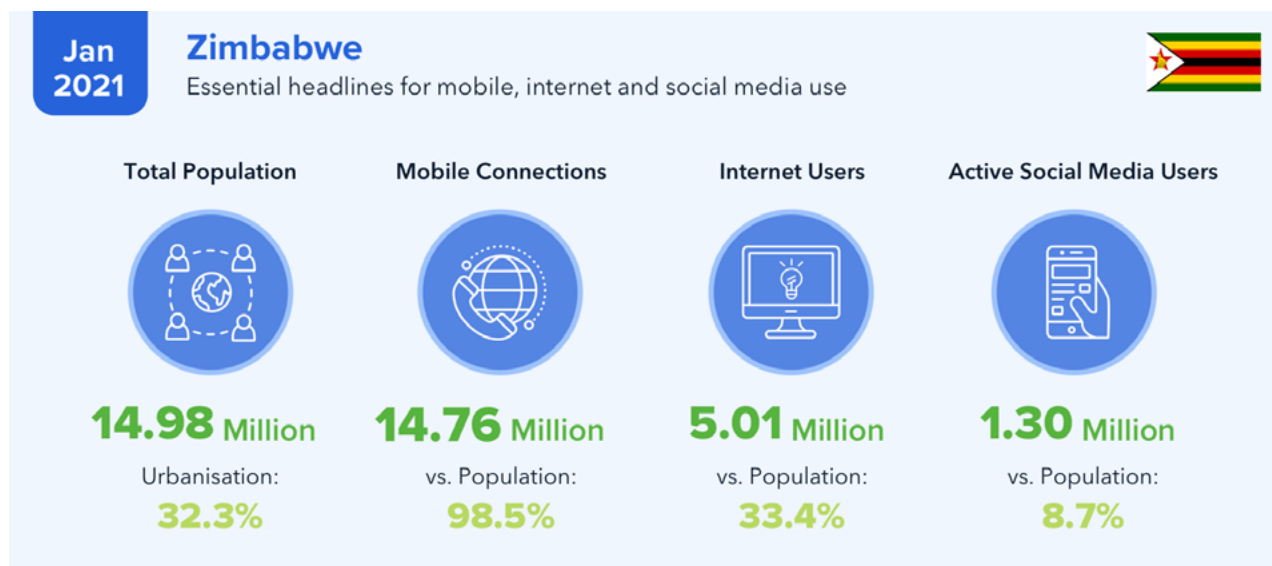
These numbers reflected year-on-year growth versus 2020, including a rapid expansion of mobile connections and growth of social media users.[40]

Jan 2021 — Annual Digital Growth
The Year-on-Year Change in Key Indicators of Digital Adoption

Total Population	Mobile Connections	Internet Users	Active Social Media Users
+1.5%	**+11.8%**	**+4.2%**	**+32.7%**
Jan 2021 vs. Jan 2020	Jan 2021 vs. Jan 2020	Jan 2021 vs. Jan 2020	Jan 2021 vs. Jan 2020
+223 Thousand	**+1.6** Thousand	**+203** Thousand	**+320** Thousand

Yet amid rampant unemployment and the pandemic, Zimbabwe's telecom regulatory body (POTRAZ) approved a 200% increase in data bundle prices resulting from increased costs to telecoms due to its unfavorable foreign exchange rate. Although the cost per megabyte is lower in comparison to neighboring countries, Zimbabwean internet subscribers making minimum wage (US$62.50/month) are spending 32% of it on a 1GB monthly data plan.[41]

Audience Use of Branded News Media[42]

Audience rating data reported by GeoPoll, a leading research organization with offices in Nairobi, highlighted the dominance of national media across Zimbabwe. Its 2020 report, customized on behalf of Internews, covered Bulawayo, Matabeleland North, Matabeleland South, and Midlands. It showed that approximately 71% of the adult population had television access, and a slightly higher number of people, 74%, had access to radio. National media dominate. The most watched television station was ZBC-TV; the most read newspaper was *The Herald,* and the most listened-to radio station was Radio Zimbabwe.

Television viewership was highly concentrated on national broadcaster ZBC-TV which attracted 103,000 viewers on average, with ETV and SABC ranked below the market leader with 45,000 and 39,000 average viewers respectively. Women accounted for nearly two-thirds of ZBC's audience with 64,000 viewers; they also turned to Glow TV and SABC1, but in lower numbers. Men accounted for 38% of ZBC's audience, but also were likely to view SuperSport and ETV.

Radio listenership in the region was concentrated on Radio Zimbabwe with 195,000 listeners on average, followed by the regional broadcaster Midlands FM that reached 59,000 people, and Khulumani FM, reaching 47,000 listeners from its Bulawayo operations.

Although national broadcasters have considerable advantages, the radio audience data reveals strong interest in locally produced content. In Bulawayo, Khulumani's reach exceeded that of Radio Zimbabwe by 26%. In Midlands, 98.4 Midlands FM was second only to the national station. The more urban the area, the more likely it is to have diverse – and community – sources of radio.

These data tell a good story about radio. Since the beginning of the Covid pandemic, 49% of radio listeners reported increasing their overall radio consumption, 55% said they are getting information from more sources, and 24% reported that local community radio is their main source of news. This increased overall reliance on radio occurred despite nearly two-thirds of audiences reporting increased costs to listen due to data costs on mobile devices.

Radio has another advantage: it is more easily accessible on mobile devices and uses less data than streamed television. 72% of television viewers watched on a traditional set, while only 7% viewed on mobile devices. In contrast, mobile devices were the most common distribution channel for radio content, with 46% listening versus 34% on a traditional radio device. Internet was almost exclusively accessed using mobile phones – 72% – with the remainder accessed by personal or work computers.

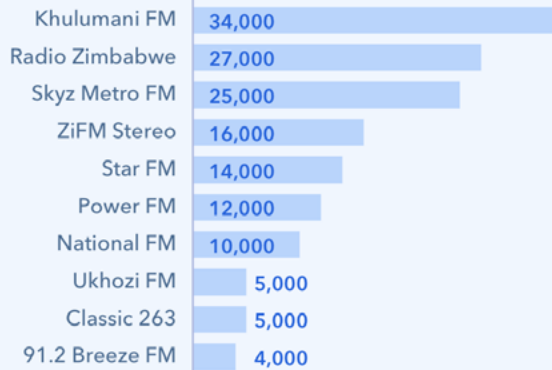Here are the radio ratings for each area:

Oct 2020 — Radio Audience Average & Share — Bulawayo

Khulumani FM led in Bulawayo with 34,000 average listerners, followed by Radio Zimbabwe, and then Skyz metro in third.
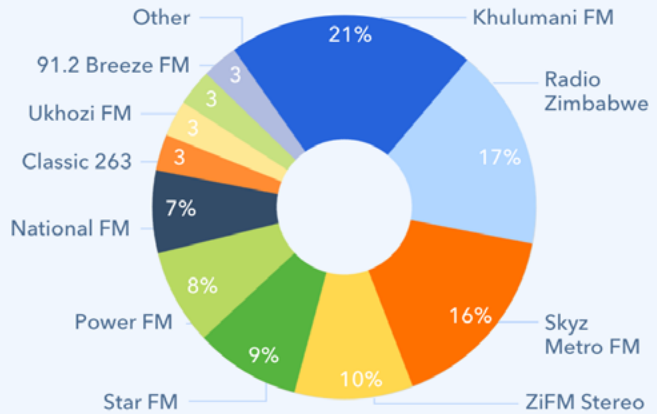
Audience Average

Station	Average
Khulumani FM	34,000
Radio Zimbabwe	27,000
Skyz Metro FM	25,000
ZiFM Stereo	16,000
Star FM	14,000
Power FM	12,000
National FM	10,000
Ukhozi FM	5,000
Classic 263	5,000
91.2 Breeze FM	4,000

Universe Estimate: 618,000

Audience Share

- Khulumani FM — 21%
- Radio Zimbabwe — 17%
- Skyz Metro FM — 16%
- ZiFM Stereo — 10%
- Star FM — 9%
- Power FM — 8%
- National FM — 7%
- Classic 263 — 3
- Ukhozi FM — 3
- 91.2 Breeze FM — 3
- Other

Oct 2020 — Radio Audience Average & Share — Midlands

Radio Zimbabwe is top in Midlands with 108,000 average listeners. 98.4 Midlands FM was second with 57,000 average listeners. These two stations dominated listenership in this region.
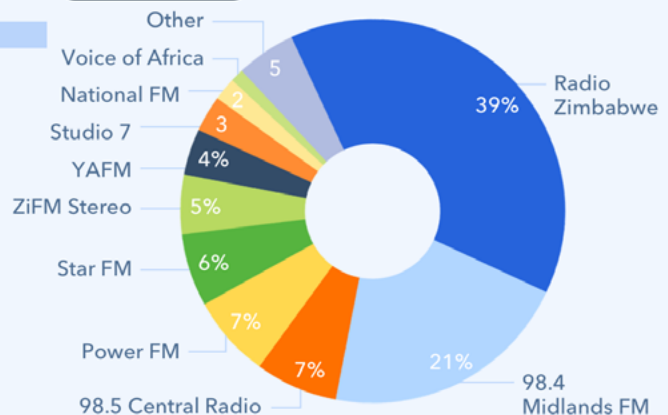
Audience Average

Station	Average
Radio Zimbabwe	108,000
98.4 Midlands FM	57,000
98.5 Central Radio	19,000
Power FM	19,000
Star FM	18,000
ZiFM Stereo	13,000
YAFM	11,000
Studio 7	9,000
National FM	7,000
Voice of Africa	4,000

Universe Estimate: 1,109,000

Audience Share

- Radio Zimbabwe — 39%
- 98.4 Midlands FM — 21%
- 98.5 Central Radio — 7%
- Power FM — 7%
- Star FM — 6%
- ZiFM Stereo — 5%
- YAFM — 4%
- Studio 7 — 3
- National FM — 2
- Voice of Africa — 5
- Other

Oct 2020 — Radio Audience Average & Share — Matabeleland North

Ratings were competitive in Matabeleland North, with three stations competing for the top spot between National FM, Radio Zimbabwe, and 91.2 Breeze FM, although National led the way at 16,000 average listeners.

Audience Average

Station	Average
National FM	16,000
Radio Zimbabwe	13,000
91.2 Breeze FM	10,000
Power FM	6,000
Skyz Metro FM	4,000
ZiFM Stereo	3,000
Classic 263	3,000
Studio 7	3,000
Ukhozi FM	2,000
Khulumani FM	2,000

Universe Estimate: 515,000

Audience Share

- National FM — 24%
- Radio Zimbabwe — 20%
- 91.2 Breeze FM — 15%
- Power FM — 9%
- Skyz Metro FM — 5%
- Studio 7 — 5%
- Classic 263 — 5%
- ZiFM Stereo — 4%
- Khulumani FM — 3
- Ukhozi FM — 3
- Other — 7%
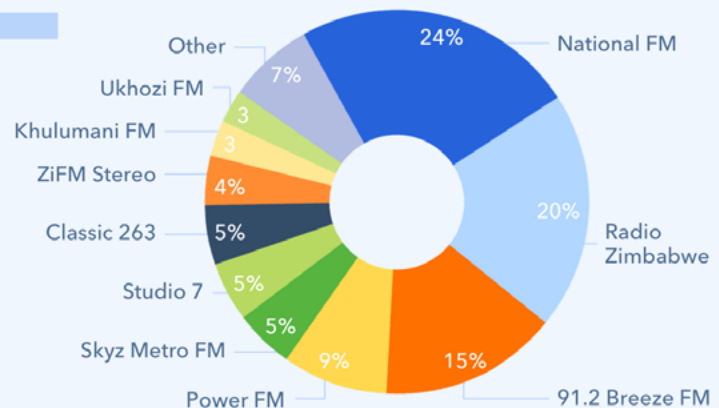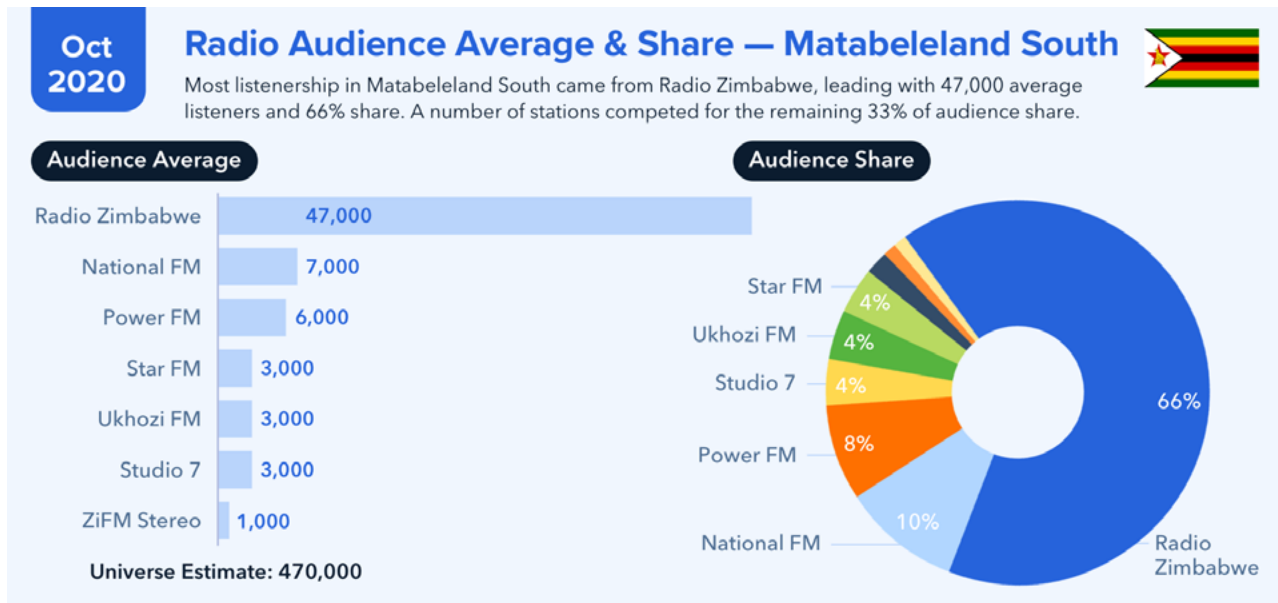
Similarly, online ratings show that there are large enough audiences for some local content producers to appear in the ratings when compared with larger national sites. Midlands Observer attracted 6% of the online news audience in these four regions and CITE attracted 2%. In a heavily fragmented field with tough competition, those are encouraging data points.

The Dominance of WhatsApp

Social media and internet access are expanding across Zimbabwe despite increases in data costs. News media are actively sought out online, particularly on Facebook (image source[43]) and Twitter.

But nothing compares to the reach or influence of WhatsApp. It is estimated to comprise more than half of all internet use in Zimbabwe.[44] Econet sells data bundles specific to WhatsApp on its Facebook page.[45] Its encrypted chat environment and calling features make it a desirable communication channel between individuals, families, and groups.
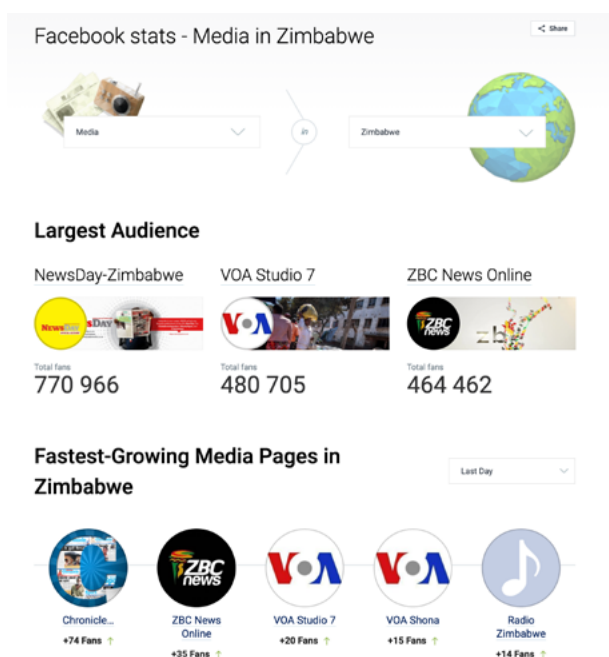
As such, WhatsApp has become a major news distribution channel and is used by diverse media organizations throughout the country. TechZim, a business publication specializing on information technology in Zimbabwe and the region, offers interested readers opportunities to join its WhatsApp communities and also links to nearly 200 other WhatsApp chat groups.

263Chat, started in 2012 as an alternative news platform, distributes a daily e-paper in .pdf format which limits the ability of people to easily alter or falsify its content. Its content is sponsored by embedded advertising which allows it to distribute content for free. Its founder, Nigel Mugamu, has observed that "to a lot of people, the internet is WhatsApp … it has enabled our brand to get to places that it has not been able to before."[46]

The government clearly views 263Chat as a news producer and has subjected it to the harsh reprisals it employs against legacy media. In April of 2019 police raided its office and set off tear gas after a 263Chat journalist recorded police forcing street vendors out of Harare.[47]

A unique aspect of WhatsApp is that it limits the number of participants in chatrooms; this helps build trust within each community. In 2020, professional researchers partnered with Internews and Kubatana.net (an organization that makes civic and human rights information accessible to the Zimbabwean public) to examine how information distributed within trusted social media sources could shape individuals' behaviors, especially in an environment where mistrust and misinformation are extensive.

Researchers developed a statistically valid test during the early days of the pandemic, a time when rumors and posts about fake cures were going viral. At the time, Kubatana had 27,000 WhatsApp subscribers nationwide in 133 WhatsApp broadcast lists. Each week it distributed two messages: one on ways to proactively help prevent spreading the virus, and the other debunking misinformation. Later, it tested whether those messages had impact on individuals' behaviors and on preventing the spread of misinformation.

The results were positive and showed that information sent through WhatsApp had impact and was able to both correct misinformation and positively influence people's behaviors. The effect was roughly equal whether in rural or urban areas, and across the gender divide. The researchers found that "a trusted source of information can use the same social media channels to disseminate information that both combats misinformation and changes related behavior … results speak specifically to the important role that trusted sources play, particularly in confusing informational situations such as health crises and in an authoritarian context."[48]

Journalists are fully exploiting the communication capabilities of the WhatsApp platform. Users appreciate that the data costs are lower than reading website content.

In a recent closed-door webinar, participants discussed their robust uses of WhatsApp in reaching and engaging audiences.

A civil society organization shares links online to recruit new users to its various chatgroups, each of which has 230-250 members. Two of those groups are used for open discussions and are filled with rich interaction. Those have attracted opinion leaders, public figures, and government workers, and often act as sources for other reporting. The social media editor and other team members act as moderators.

Its other groups are used for content distribution, and the team posts full articles from its website with links to the page. They also cut video and audio clips from the chatgroups into short pieces that are posted on their website and feed into their social media platforms.

One organization reported having a WhatsApp hotline number to receive tips and story ideas.

Several use it to target content to more specifically to demographic groups such as youth, women, and men. One organization reported using audience analytics to not only segment its audience but to also then use that data to approach relevant advertisers.
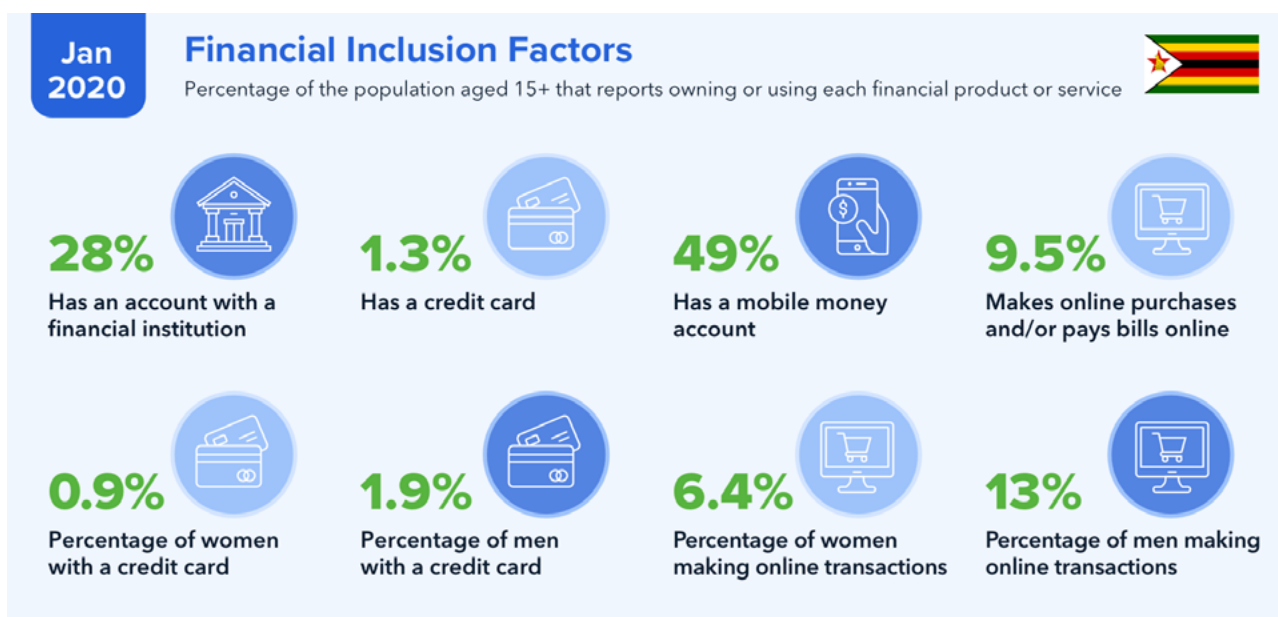
Another organization reported it has a weekly WhatsApp group chat room where editors identify a topic and invite policymakers to lead a conversation. This is done through chat and voice notes; content and audio clips are later published as podcasts. These groups are created exclusively for a specific chat and closed afterward. Members text the chat administrators to be added, and the groups usually fill completely. The organization has a second open networking group that is used to discuss current affairs, the coverage of women's issues in the media, and the challenges facing women.

While WhatsApp plays an important news role, and has deep user engagement, media organizations are finding it difficult to scale. Group limits are set at 256 members. In a low bandwidth environment with expensive data costs, it can take hours to fully distribute content across a large membership. It can also be expensive for users to upload voice messages; the media organizations have tested various ways to "pay" them with additional data.

Accessing Mobile & Digital Payments as the Basis of Ecommerce

A critical aspect of monetizing digital media channels is the existence and prevalence of non-cash payment systems. Zimbabweans have access to mobile money and rely on it more than traditional banking systems.

In its most recent data available from Zimbabwe, based on 2019 reporting from the World Bank, Hootsuite estimated that more adults (15+) had access to a mobile money account (49%) when compared to those with financial institution accounts (28%). Other factors representing financial inclusion such as credit card ownership (1.3%), or people making online purchases or paying online (9.5%) are understandably low.[49] Thus, for media operators seeking to generate revenue from consumers or businesses, payment gateways that can accept mobile payments are essential.

Jan 2020

Financial Inclusion Factors
Percentage of the population aged 15+ that reports owning or using each financial product or service

28%
Has an account with a financial institution

1.3%
Has a credit card

49%
Has a mobile money account

9.5%
Makes online purchases and/or pays bills online

0.9%
Percentage of women with a credit card

1.9%
Percentage of men with a credit card

6.4%
Percentage of women making online transactions

13%
Percentage of men making online transactions

As in other countries in the region, however, that is a dynamic situation. Econet, the leading mobile and internet providers, offers EcoCash, the market leader in fintech mobile payment systems. It has been estimated to have 98.26% market share of mobile money transactions, and 97.75% share of the value of those transactions during 2020.[50]

Beyond its basic mobile money services, such as topping up phone data and paying for goods, utilities, and services, it also offers specialized money products such as transferring remittances from members of the diaspora to their families and others.

Econet has racked up headlines for the substantial funds its network has processed. It was spun off as part of an Econet startup, Cassava Smartech, which said in its 2020 annual report that since the company's inception it had processed ZWD$93 billion in lifetime transactions.[51] In the chart below, it claims that it has been adopted by more than 90% of the country's adult population.

Its dominance has also earned the scrutiny of the Zimbabwean government and the Reserve Bank of Zimbabwe (RBZ) which, in 2019, shut the service down temporarily and accused it of essentially operating a Ponzi scheme. During 2020 it incurred regulatory pressures which were part of a larger move to stabilize the distressed national currency, end black market foreign currency speculation, and normalize transactions between banking and mobile money systems. It was forced to join ZimSwitch, the sole national electronic funds switch and clearing house for the country, which processes electronic transactions among member financial institutions including online, mobile, and electronic transactions.[52]

At the end of the day, these transitions are probably beneficial for consumers and helpful to establishing ecommerce. The RBZ has limited consumers to one mobile money wallet which will help limit speculation and account manipulation. Transactions are limited to a ZWD$35,000/week limit. These have had the overall effect of limiting transactions. Yet with virtually non-existent competition, and restrictions on transaction volumes, EcoCash has been assertive about imposing fees and transaction costs, earning it backlash.[53]

EcoCash Offerings[54]

Digital Cashless Society
Significant adoption of EcoCash platforms and solutions to eliminate the need for cash. 35% by value and 82% by volume of transactions within the entire financial sector go through EcoCash

Savings Culture
Over 1.5 million EcoCash savings accounts. 5,000 Burial Societies paying through EcoCash

International Remittances
Over US$360 million in international remittances through formal channels

+ZWL 93 billion transacted on the platform since launch

Financial Inclusion
Over **10 million** mobile money accounts in 7 years i.e. over **90%** of adult population vs bank accounts combined at **3 million.** Prior inclusion was at **41%**

Job Creation
+200,000 new direct and indirect jobs through Agent Network, Brand Ambassadors and other Independent Contractors. Over ZWL 60 million paid in commission since launch.

Capturing the Informal Sector
More money circulating in the formal digital financial system resulting in increased efficiencies. 17,000 on KYC lite merchant offering transactions digitally; ZWL 98 million from launch (2018)

Advertising Expenditures in Local Markets

Given the nation's dire economic situation, advertising revenues are slim and exist mostly at the national level. Key segments advertise in print and on television, and include the social security administration, telecoms, and supermarkets. Ad agencies tend to service national clients rather than local markets. Observers conclude that ad revenues tend to flow to the national media with close-to-government ties. As noted above, the most recent ad spend estimate was in 2015, which valued the entire market at USD$152 million. Small, independent news media are at significant disadvantage in this environment.

There is limited advertising infrastructure to support a more dynamic ecosystem. Large global ad agencies are not present in the market. ZARF, the Zimbabwe Advertising Research Foundation, has been inactive on Facebook since early 2019 and its website appears to be currently on pause. It was established in 1997 to provide research about the Zimbabwean advertising market and its audiences, with data comparable to those used in other African markets. Its last blog was posted in 2016 and its event calendar is empty.

At the local level, journalists report that during the pandemic there has been growth in advertising for services that drill for wells and for solar energy systems. These are well-suited to news media in the WhatsApp environment with its limited and geographically focused reach.

Conclusions

There is a growing market for factual, independent, reliable, and affordable news delivered in diverse languages in southern Zimbabwe. The local revenue sources to fund those efforts are not apparent.

In an area of deep poverty, which has only been amplified by natural disasters and pandemic, large parts of the population live in the informal economy and at subsistence levels. Consumer-generated revenue, at a level equal to supporting newsgathering, is unlikely to materialize in the near-term. National advertising revenue appears to be captured by close-to-government news media and does not flow to the community level; there are few sources of paid local advertising.

The government has used prolific tools in its efforts to suppress reporting, including force, legislation, intimidation, imprisonment, and – perhaps the most ubiquitous – increasing credentialing and licensing fees to unaffordable levels. While the absolute cost of those fees might seem modest, in the context of pervasive poverty, they are often punitive. Broadcast licenses remain beyond the reach of local news organizations in smaller urban or rural areas.

Yet there are ways to strengthen journalists and journalism. Journalists have demonstrated spirited innovation in their adoption of low-cost, no-cost platforms such as WhatsApp and Facebook. Their use of podcasts, populated with audio bites captured from chatgroups enables them to reach audiences (literate or illiterate) in vernacular languages. Audiences' increased use of diverse news sources, including online ones, during the pandemic reflects their hunger for credible information.

Investments in capacity building, along with support in the form of computers, phones, and data, will help meet those needs. Topline audience data from GeoPoll suggests that deeper dives into audience analytics, particularly those related to youth and women audiences, could help uncover rich veins of content that would connect in substantive ways with those audiences.

While many media stakeholders in Zimbabwe were initially excited about the registration of community radio stations, excitement has been damped by the lack of clarity on how they can access revenue, and that the awarding of some licenses is politically motivated.

Community and university radio station licenses are now available and can be a vector for reaching populations marginalized by poverty, language, geography, or age. If licenses are awarded to independent media outlets and if those outlets are allowed (i.e., funded) to flourish, those emerging from those outlets should create a pipeline of journalists familiar with local context and ready to produce local content.

The popularity of WhatsApp groups suggests that local organizations have a close ear to the ground. By differentiating on local, hyperlocal, and vernacular language media – and optimizing their use of digital media platforms – they can carve an important niche out of a larger media ecosystem dominated by well-funded and politically-connected media.

At some unknown point, the country will complete its digital broadcast conversion and the telecom market should both open and become more affordable. MISA-Zimbabwe and others are already encouraging independent media to bypass broadcast and develop digital offerings. Strengthening media's use of digital analytics, preparing them to better manage their owned and social media platforms, and improving their basic technology skills would all be beneficial.

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