Information Ecosystem Assessment: Flow, Needs & Access in Ethiopia

June 2021
Information Ecosystem Assessment:
Flow, Needs, and Access in Ethiopia

The Case of Addis Ababa & Gambella

June 2021
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ACKNOWLEDGEMENTS

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We would also like to thank the Ethiopian Broadcasting Authority, government and private owned media outlets in Addis Ababa, Gambella regional government, Itang woreda administration, non-media stakeholders, and others who are not mentioned here for their unreserved support and participation in this IEA.

Last but not least, we would like to extend our gratitude to Internews Network for mobilizing the required resources to make this assessment a possibility.
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<td><strong>CMLR</strong></td>
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<td><strong>KII</strong></td>
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<td><strong>UNESCO</strong></td>
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EXECUTIVE SUMMARY

For long, Ethiopia ranked among the worst countries globally for media freedom as its leaders were accused of systematic harassment and silencing of opposing voices. However, following reforms started in 2017, the government began to open up the media space by releasing journalists and bloggers from prison, unblocking hundreds of jammed news websites and facilitating media law reforms. As a result of these reforms, Ethiopia has improved its ranking in the World Press Freedom Index. Yet, the media landscape remains fluid with a combination of positive and negative developments.

The findings of the study indicate that while there is a more open space for the media to get information and share with the community since 2018, there are still major gaps in the areas of access to timely information by the media, infrastructure for mainstream media operations in the regions, technical capacity of media practitioners, and information verification mechanisms. There is a visible difference in the media landscape between the capital city, Addis Ababa, where there are adequate channels and a relatively better access to information, and the Gambella Region where there is next to no access to mainstream media, very poor infrastructure, and a restrictive government structure. Consumer feedback and information verification practices are low among the media. Legacy media are quickly adapting to the digital media as complementary to their mainstream channels. But due to lack of a well-regulated digital media and the limited efforts and/or capacity of the government to enforce the existing laws, misinformation and fake
news on social media has significantly eroded the recipients’ trusts.

On consumers’ side, there is a dire need for credible and accurate information. The absence of adequate verification sources has forced consumers to rely mainly on government-run channels for national issues. Social media has become a game-changer on how the community receives and shares information. It has provided a much freer space, convenient for access to a wide range of channels using mobile phones. However, due to hate speech, fake news, and misinformation, consumers’ trust of information from social media sources has slumped. Word of mouth is still the most widely used and trusted channel to exchange information. Social gatherings of various sorts provide the platform for the consumer.

Based on the findings of the assessment, it is recommended that media professionals undergo capacity building to acquire more knowledge on social media content development and management, consumer feedback processing, and information verification mechanisms. In addition, advocating for information verification and feedback mechanisms through capacity building of existing platforms, providing financial and technical support, and supporting the establishment of these systems can contribute to tackle fake news, rumors and misinformation. Creating awareness about media and communication among government structures and non-media actors is critical. As this assessment cannot be taken as conclusively representative of the media landscape of the study areas, conducting further assessment and developing a communication strategy relevant to the intended consumer is key in successfully implementing a media and communications-focused intervention.
1. INTRODUCTION AND BACKGROUND

The dissemination of information in Ethiopia is facilitated through diverse channels of communication. TV, radio and digital media are the dominant channels while print media holds a minimal share. Government-owned regional TV and Radio stations mainly cover pro-government and political issues, but also are active in their coverage of local issues that include development and local community activities.¹ The country's independent media are generally small in size and coverage compared to government-operated outlets. In recent years, non-political channels that focus on business and infotainment (information and entertainment) issues are being introduced to the media scene.

For long, Ethiopia ranked among the worst countries globally for media freedom as its leaders were accused of systematic harassment and silencing of opposing voices. However, following reforms started in 2017, the government began to open up the media space by releasing journalists and bloggers from prison, unblocking hundreds of jammed news websites and facilitating media law reforms. As a result of these reforms, Ethiopia has improved its ranking in the World Press Freedom Index published by Reporters without Borders (RSF). According to RSF, with the commitment for reforms, Ethiopia jumped 40 places from 150 to 110 out of 180 countries in the 2019 World Press Freedom Index - the biggest improvement by any country.²

In 2020, it moved further up to 99th spot on the index.

¹ CIMA, 2019, https://www.cima.ned.org/blog/ethiopia-is-unshackling-the-media-but-true-independence-will-depend-on-reforms/
² https://rsf.org/en/ranking
Yet, the media landscape remains fluid with a combination of positive and negative developments. While there are hopes for the ongoing media reform process, the opening of the political space, freedom of information, access to information, and citizen participation in the socio-political realm remains a challenge. Hate speech and misinformation are on the rise adding another dimension to the challenges to accessing credible information.

This assessment is conducted using Internews' Information Ecosystem Assessment methodology, which is designed to analyze both the supply and demand sides. The assessment aims to gain a comprehensive understanding of the full spectrum of the information ecosystem in Ethiopia. Specifically, it will look into channels people have access to, what kinds of channels are available, what kinds of information is provided and the main actors in the sector.
2. RESEARCH METHODOLOGY

2.1 THE RESEARCH PROCESS

This assessment is done following the information ecosystem assessment (IEA) guidelines developed by Internews. Accordingly, all phases in the guideline, except quantitative data collection, were followed through to achieve the results of the assessment. Details of the process followed are described below.

2.1.1 The Study Area & Population

The study was conducted in two regions of Ethiopia: Addis Ababa City Administration and Gambella Region. The locations were selected based on their demographic profiles of urban and rural compositions, as well as to encompass emergency and non-emergency settings. The population that participated in the study includes urban dwellers, rural residents, and host communities, across genders and all age groups.

The geographical coverage of the study areas encompassed two sub-cities in Addis Ababa (Bole and Akaki-Kality) and two woredas in Gambella Regional State (Abol and Itang).

Figure 2: Maps of IEA locations
2.1.2 Assessment Methodology, Approach and Tools

The assessment followed the phases outlined in the Internews IEA guideline. Below is the breakdown of the phases and methodologies employed as per the study segments.

**Phase 1: National Media Landscape Review (NMLR)**
An extensive review of available literature and studies was done. The findings of the desk/literature review helped to triangulate results of this assessment and draw important insights.

**Phase 2: Community Media Landscape Review (CMLR)**
A desk review of available materials and previous studies was done to gain an understanding of the media landscape at the community level.

**Phase 3: Information Needs Assessment (INA)**
This assessment engaged with 239 individuals through KIIs and FGDs. However, although it cannot be considered as a full-fledged INA, the results may still be used as input in designing targeted/project-specific INAs.

**Phase 4: Field Visit, Observations and Conversations**
The team of consultants conducted informal conversations with, and observations of, selected locations in Addis Ababa and Gambella. The observations and informal conversations provided first-hand information that complement responses through structured interviews.

**Phase 5: Pre-data Collection Interviews**
The assessment team conducted pre-data collection interviews to identify potential informants and to pilot the tools developed. Accordingly, some adjustments were made to the tools and the selection of informants.

**Phase 6: Make connections with allies**
The assessment team has established connections with various stakeholders operating in the study areas. These networks have provided key insights to understanding the information ecosystem in their respective areas.

**Phase 7: Mobilize Your Team**
The team is composed of:
I. Lead Researcher (1)
II. Coordinators (1)
III. Facilitators (6)
IV. Data Manager (1)
V. Graphic Designer (1)

**Phase 8: Create a Questionnaire/Prompt Sheet**

The following tools were developed for the purpose of this assessment:

I. Focus Group Discussion (FGD) guide for community
II. Key Informant Interview (KII) guides for community
III. KII guide for media sector
IV. KII guide for non-media sector communicators/Other stakeholders
V. Observation guide

**Phase 9: Survey in the Community**

The following methodologies were employed to gather data:

<table>
<thead>
<tr>
<th>Type of KII</th>
<th>Respondent Selection</th>
<th>No of Engagements</th>
</tr>
</thead>
<tbody>
<tr>
<td>KII with Media Stakeholders</td>
<td>Stakeholders include governmental &amp; non-governmental organization staff members</td>
<td>11</td>
</tr>
<tr>
<td>KII with Non-media Stakeholders</td>
<td>&gt;&gt;</td>
<td>12</td>
</tr>
<tr>
<td>KII with Community</td>
<td>Community members, community leaders and local administrative officials</td>
<td>120</td>
</tr>
<tr>
<td>FGDs with Community</td>
<td>Community members and community leaders</td>
<td>16</td>
</tr>
</tbody>
</table>

**Table 1: Distribution of IEA participants**

**Phase 10: Post-data-collection interviews, analysis and validation**

An in-depth analysis of the data gathered using the various methods mentioned above was done.
2.1.3 Community KII & FGD Respondents’ Profile

Socio-Demographic Characteristics
The socio-demographic characteristics of the study respondents are essential in the interpretation of the findings, the development of appropriate interventions for the specific study, and/or for understand the problems investigated. The socio-demographic characteristics collected by this IEA study included gender, age, level of education, employment status, respondent type (KII or FGD), and locations. The findings are presented below:

Table 2: Respondent numbers by type

<table>
<thead>
<tr>
<th>Respondent Type</th>
<th>Addis Ababa</th>
<th>Gambella</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information Consumers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community KII</td>
<td>80</td>
<td>40</td>
</tr>
<tr>
<td>Community FGD</td>
<td>60</td>
<td>36</td>
</tr>
<tr>
<td>Information Suppliers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Media &amp; Nonmedia KII</td>
<td>15</td>
<td>9</td>
</tr>
<tr>
<td>Total Respondents</td>
<td>155</td>
<td>85</td>
</tr>
</tbody>
</table>

Area of Residence of Respondents

Respondent Gender Profile, Gambella Region

<table>
<thead>
<tr>
<th>Gender</th>
<th>KII</th>
<th>FGD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>80%</td>
<td>69%</td>
</tr>
<tr>
<td>Female</td>
<td>20%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Respondent Gender Profile, Addis Ababa

<table>
<thead>
<tr>
<th>Gender</th>
<th>KII</th>
<th>FGD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>61%</td>
<td>68%</td>
</tr>
<tr>
<td>Female</td>
<td>39%</td>
<td>32%</td>
</tr>
</tbody>
</table>
Community KII & FGD Respondents’ Profile

Figure 3: Respondent profiles illustrated
3. DECK REVIEW OF RELATED LITERATURE

3.1 NATIONAL MEDIA LANDSCAPE REVIEW (NMLR)

3.1.1 Media Regulation and Law Reform

Ethiopia's constitution grants freedom of expression "without any interference" and the freedom of the press and other mass media, including freedom of artistic expression, are covered in that provision. However, with the introduction of restrictive legislation such as the mass media and access to information proclamation of 2008, and anti-terrorism laws of 2009, the promises of freedom of expression have been seriously compromised. This has led to the shutdown of numerous media houses and persecution of media professionals.

Since the start of reforms in 2017, however, the government has been working on amending the media laws that have long been criticized for being overly regulatory. For example, both laws that have been described as draconian have been retooled. A Media Council has also been established and started to advocate for self-regulation of the media. Accountability of the public media sectors has now been shifted from the executive branch to the parliament.

All these initiatives have been done in this very short period. However, the question of how far the media is playing their roles, for instance, in promoting peace and reconciliation, and democratization has not been assessed scientifically. In August 2018, a Media Law Working Group (MLWG) was constituted by Legal and Justice Affairs Reform Advisory Council (LJARAC) to coordinate and analyze laws that are widely perceived to be incompatible with the Constitution, or as having had a detrimental effect on media freedom in Ethiopia. The Media Law Working Group's main objective is to ensure that these legislations' norms and institutions are compatible with the Constitution and relevant international human rights standards. It is comprised of legal experts in the industry, media professionals, media owners, media

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rights groups including civil society members, and was also tasked to analyze the limitations and gaps around these laws and provide research-based recommendations. Three major proclamations regarding the media in Ethiopia are currently being reviewed with a view to reform. These include legislation on access to information, the mass media proclamation, and computer crime proclamations.

### 3.1.2 Access to Information

According to reports of various media stakeholders, access to information in Ethiopia is generally limited. A combination of factors, both from information providers and recipients, have been identified to have contributed to the limited access to information.

According to a 2019 study by *Deutsche Welle Akademie (DWA)*, there are several challenges to access to information in Ethiopia. Some of the challenges are: lack of information from the government to the public, unverified information, and misinformation and hate speech circulated through social media. Challenges identified in the media sector included lack of capacity among journalists; lack of issues-based reporting and specialization, and instead a continued focus on developmental journalism.\(^4\)

Organizations such as *DWA, BBC Media Action, IMS-Fojo* and others have conducted studies and analysis regarding access to information in Ethiopia, focusing on the humanitarian context. Access to humanitarian information was found to be low, according to these studies. The reports indicated that individuals have limited access to information due to a combination of factors including lack of equipment, lack of communication by service providers, and lack of access to electricity grids for power supply, among others. On the other hand,

\(^4\) DWA INA, 2019
service providers reported lack of adequate resources, community engagement expertise and lack of media outlets as some of their challenges to deliver information to the community.

3.1.3 COVID-19 and the Media

Over the past year, the dominant issue in the coverage and operations of public and private media in Ethiopia has been the COVID-19 pandemic, and the global economic recession that resulted from this catastrophe. The pandemic has hit Ethiopian businesses profoundly, and thus, advertising revenues have dropped dramatically for both print and broadcast media resulting in the closure of some media houses. Data from one of the prominent newspapers shows that it has introduced cuts in the number of pages and decreased its circulation due to the economic impacts of the pandemic. The Ethiopian Publishers Association is lobbying for tax reduction and a service-level credit from the most used newspaper printing press in the country – Berehanena Selam – which is operated by the government.5

The media did not routinely cover health-related issues before the COVID-19 pandemic. Although medical discussions and live question-and-answer programs have been part of the landscape, journalists' role in these programs had not usually extended beyond one of hosting medical experts. With the emergence of COVID-19, most traditional and digital media outlets have started to regularly inform the public about preventive methods and status updates regarding the pandemic.

3.1.4 Media, Diversity and Inclusion

A. Language: There are more than 85 different ethnic groups in Ethiopia among whom around 83 languages are spoken with up to 200 different dialects. According to the latest census conducted in 2007,6 the Oromo make up the largest share of the population – at about 34% – followed by the Amhara who make up around 27%. All other population groups are much smaller, with the next largest proportion going to the Somali who make up six percent.

5 IMS, Media stakeholders Mapping study, 2020.
6 CSA
Amharic is the official language, in which most media content is produced. According to the latest census in 2007, the largest first languages are Oromo (33.8%), Amharic (29.3%), Somali (6.25%), Tigrinya (5.86%), and Sidamo (4.84%) with Amharic being the most common second language.

B. Diversity: Although Ethiopian media outlets enjoy relative freedom from the state, most of the media and their content cannot be described as plural in their views. Limited issues, limited views, and the ideologies of a limited number of groups take the highest share in the Ethiopian media coverage, and dominate the discourse. When it comes to online media, activists and bloggers are taking the largest share of content production. In both mainstream and digital platforms, civil society, academicians, and religious and cultural leaders who do have large contributions in the case of peace and reconciliation, as well as alternative sources, do not have adequate claims to share. This indicates that audiences are not getting a pluralistic view. Moreover, the Ethiopian media landscape continues to be urban-centered, and issues of the rural areas – nearly 80% of the population – may not be the focus of the media.\(^7\)

C. Gender: Research in Ethiopia commonly found that gender (male and female) has not been proportionally represented in the Ethiopian media operations. Even though few women journalists are leading some media institutions, engagement of women in the media is still very low. Studies regarding how their voices have been heard in the media has also shown similar results. While females share a proportional number of the population, being victims of the country’s socio-economics and politics, their issues have not been adequately brought to light in

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the media. According to a study by UNESCO, this might be due to journalists' lack of understanding on issues of gender and inclusiveness.\(^8\)

### 3.1.5 Media Sectors: Broadcast

In Ethiopia many people rely on information they receive through word of mouth, particularly what they hear at community meetings or through their local church or mosque. On the media front, radio is the primary source of news and information in rural areas where most people live. Ethiopia has 10 publicly owned radio stations – some national and others regional.

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Fourteen private radio stations operate in Ethiopia. Many other broadcasters on radio have regional stations and in all, 31 community radio stations are operational, out of a total of 52 stations registered by the *Ethiopian Broadcasting Authority (EBA)*.¹⁰,¹¹

There are significant regional variations among radio audiences, because of low-income levels and electrical power scarcity in rural areas.¹² Private commercial broadcasters tend to have a larger audience than the public media because of their relatively better journalistic skills and entertainment content. According to the latest audience survey conducted by the *BBC Media Action, Ethiopian Radio*, a national government broadcaster, is the most listened-to radio station. Regional radio stations like *Oromia FM* and *Debub FM* are also popular.¹³

In the cities, television is the most popular source of information reaching a significant portion of the population. Among television viewers, private television stations are generally watched by more than 66%, the national public broadcaster (*ETV/EBC*) by 20%, and the remaining 14% watch international or regional satellite television. There are 116 broadcast outlets licensed by the *EBA* (40 of which are for TV).

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¹² Media Progress, 2018, [https://www.media-progress.net/downloads/Overview%20of%20the%20Ethiopian%20Media%20Landscape%202018.pdf](https://www.media-progress.net/downloads/Overview%20of%20the%20Ethiopian%20Media%20Landscape%202018.pdf)

¹³ BBC Media Action, May 2020, Media Audience Survey Report: Understanding Audience media usage in Amhara, Oromia, SNNPR and Tigray Regional states (Unpublished). The audience survey is conducted to understand media usage and perceptions of media to inform the development of project activities and support partners to understand their audience better. 2,000 interviews were conducted in March 2020, in 5 regions of the country (Amhara, Oromia, Tigray, SNNP, Addis Ababa).
Twenty-four commercial and 10 public satellite television stations are also operating in Ethiopia. The expansion of satellite television in Ethiopia has created alternative media platforms for the public.

In 2017, more than 18 million Ethiopian households were covered by satellite TV reach. Among the TV offerings, government channels are more highly sought after by audiences than commercial alternatives.

Television (49%) and Radio (47%) are the most accessed media in Ethiopia where 49% have access to simple mobile phones, according to the same survey by the BBC. Many are being left behind, however, as over a quarter (27%) of those surveyed have no access to the four leading media platforms – TV, Radio, internet, and newspapers. The high cost associated with internet access is a significant practical barrier across the board; however, the uncertainty of using it is also a significant obstacle.

The same BBC survey shows that access to all media is lower among women, older people, and those living in rural areas. As a result, many rely on word-of-mouth sources of information. It also revealed that Ethiopian Broadcasting Corporation (EBC), the government-owned national broadcaster, is most liked (29%) and trusted (28%) among the TV channels in most of the regions. From privately owned TV channels, Ethiopian Broadcasting Service (EBS) is most liked (8%) and trusted (7%). Regional TV channels

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14 GEOPOLL, 2017 (insert link)  
15 BBC
like Oromia TV, Tigray TV and Amhara TV are more liked and trusted in their respective regions.16

3.1.6 Media Sector: Print Media

By the end of 2019, there were 21 privately owned newspapers in circulation in more than one regional state in Ethiopia, as registered by EBA – 15 newspapers and six magazines.17 Newspaper circulation is very low, however, with leading private newspapers issuing only weekly 50,000 copies combined. The average circulation is estimated at 7,000 copies – a very small amount for a country like Ethiopia with a population of over 100 million.

Distribution is limited to Addis Ababa and a few large cities, and the cost of newspapers is expensive for the vast majority of the people. Government advertising supports only state newspapers such as Addis Zemen and the Ethiopian Herald. Privately held newspapers mainly get their advertising from the private sector,18 and all of them rely on a single, state-operated printing press where delayed printing and shortages of newsprint and ink are common.19 The reliance on state-operated printers exposes the newsletter to censorship of content and delays in printing.

Newspaper consumption is lower than other media types, and only six percent of respondents (n=2,000) mentioned accessing a newspaper, and just four percent reported doing so at least once a week, of which slightly more men (7%) have access compared to women (5%). In terms of location, people in urban areas

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16 BBC
18 MDIF, May 2020,
(14%) are much more likely to consume print news than those living in rural locations (3%). The Amharic weekly *Reporter* is the most read newspaper (29%), followed by another Amharic weekly *Addis Admas* (25%)20.

### 3.1.7 Media Sector: Digital Media

Online media platforms are popular in Ethiopia and among the Ethiopian community in the diaspora, even though existing media laws of the country do not recognize digital and online media. Many internet-based outlets have registered their companies abroad and operate from Ethiopia through a production services license. Data shows that online media organizations collect revenue from domestic advertisers and through *Google AdSense* on services such as *YouTube*.

Despite hostile conditions caused by poor internet connectivity and repressive laws, online activism has gained considerable momentum and influence over the past few years. Social media and communications platforms have been integral to the mobilization of widespread anti-government protests in the Oromia and Amhara regions since November 201521 – protests that were directly linked to the 2018 regime change and subsequent reforms. Activists have also used social media platforms to consistently report on the arrests, trials, and political prisoners’ releases.22

**A. Internet:** Despite marginal gains in access, Ethiopia remains one of the least connected countries in the world. Data rates are expensive and monopolized by the sole, state-run service provider, *Ethio Telecom*. But Ethiopians in major urban areas have seen considerable gains in internet and telephone connectivity over the last two years. This is mainly related to the political reforms that began in April 2018. According to *Freedom on the Net*, the government continued to reform the telecommunications sector, creating a new regulatory body, and continuing plans to partially privatize the state-owned monopoly.23

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20 BBC Media Action, May 2020, Media Audience Survey Report: *Understanding Audience media usage in Amhara, Oromia, SNNPR and Tigray Regional states (Unpublished).* The audience survey is conducted to understand media usage and perceptions of media to inform the development of project activities and support partners to understand their audience better. 2,000 interviews were conducted in March 2020, in 5 regions of the country (Amhara, Oromia, Tigray, SNNP, Addis Ababa).


23 [https://freedomhouse.org/country/ethiopia/freedom-net/2020](https://freedomhouse.org/country/ethiopia/freedom-net/2020)
the government announced its decision to transfer a 40% stake in *Ethio Telecom* to private companies.

Data from the *International Telecommunication Union*\(^\text{25}\) indicates that Ethiopia's internet penetration stood at only 18.6% in 2017, compared with 15.4% in 2016. Internet penetration differs substantially between urban and rural areas. According to *Datareportal*, as of January 2020, 21.1 million people use the internet in Ethiopia,\(^\text{26}\) representing 18.5% of the total population. While internet speeds have increased in Ethiopia, the country still fares poorly in global rankings. In May 2020, Ethiopia was ranked 105\(^\text{th}\) and 152\(^\text{nd}\) in *Ookla's SpeedTest* global index for mobile and fixed-line broadband speeds respectively.

**B. Mobile:** Ethiopia has among the lowest smartphone ownership rates globally, at only four percent, according to a 2016 *Pew Research Center* survey.\(^\text{27}\) *Datareportal* states that there were 46.75 million mobile connections in Ethiopia in January 2020, which is equivalent to 41% of the total population. However, most citizens who have mobile phones cannot utilize data services because of the types of phones they have, which internet capable. Yet, 92% of internet users access the web through mobile phones. The number of mobile devices on the network is 43 million, and the number of monthly active users is 16 million.\(^\text{28}\)

**C. Social Media:** In January 2020, there were 6.2 million active social media users in Ethiopia. The number of social media users increased by 237 thousand (4%)
between April 2019 and January 2020. Compared to the total population (estimated at 113.5 million), only 5.5% are active social media users. Out of the 6.2 million social media users, 97% of them access the platforms from mobile devices.

Social media penetration in Ethiopia stood at 5.5% in January 2020. According to the 2019 BBC-MA audience survey, most respondents reported using the internet to keep in touch with friends (91%), followed by using it to access social media such as Facebook and Twitter (86%). Facebook, with 92%, is the leading platform on which internet users have an active profile. Facebook was followed by IMO (55%), Telegram (52%), and WhatsApp (24%). Sixteen percent of internet users said they trust what they read or see on social media, while two-thirds (67%) say they do not trust some content. Fewer than one-in-ten (9%) say they keep information in their profile hidden to avoid revealing their identity. Just over half (53%) say they could recognize advertising on social media.30

29 https://datareportal.com/reports/digital-2020-ethiopia
3.2 COMMUNITY MEDIA LANDSCAPE REVIEW (CMLR)

3.2.1 Overview
To date, 52 community radio stations have received broadcast licenses from the Ethiopian Broadcast Authority (EBA). Out of these, 31 (59%) have started some form of broadcast. Two licenses have been canceled, and the rest (37%) are conducting preparatory and start-up related activities to launch broadcasts over the coming year(s).\textsuperscript{31}

3.2.2 Location and Distribution of Community Radio Stations
In 2019, there were registered 13 community radio stations in the Southern Nations, Nationalities and Peoples’ Region (SNNPR), 11 in Oromia, nine in Amhara, five in Tigray, four in Somali, three in Benishangul Gumuz, two in Addis Ababa City Administration, two radio stations in Afar, and one in Gambella region.

3.2.3 Challenges and Opportunities in Community Media
The main challenges of the community media sector are related to awareness on the role of community media, low media literacy rates among audience populations, lack of adequate staff, hence reliance on volunteers, inadequate broadcast equipment, lack of support from donors, and a high degree of influence from institutions such as NGOs, local administration and other offices in content production and administration. They also have weak structures and insufficient financial support from communities.

\textsuperscript{31} ibid
Moreover, the stations face severe challenges of high turnover of staff members, including volunteers. The decrepit technical facilities and lack of spare parts are some of the main reasons that are forcing the stations to operate under difficult circumstances and fear of interruptions. Besides, the status of technical facilities and their capacity for the community radio stations, except a few, can be described as low.\textsuperscript{32}

Community radios in Ethiopia generally disseminate relevant information to their target audiences. Communities are enjoying these stations that mainly deal with political, social, cultural, and other communal issues. However, the number of community radios are not adequate to cover large areas and address public issues and concerns.\textsuperscript{33}

### 3.2.4 Communication and Community Engagement in a Humanitarian Context

**Refugee context:** Ethiopia is surrounded by instability due to conflicts in neighboring Somalia and South Sudan and, until recently, its strained relationship with Eritrea. In addition to this, porous borders, humanitarian challenges, extreme poverty, the mediocre reality of rule of law and access to justice, widespread corruption, the marginalization of women, coupled with gender-based violence, and the presence of violent opposition groups in several countries in the region are among factors that contribute to low levels of human security.

Continued insecurity within neighboring states has resulted in sustained refugee movements, either directly as a result of internal conflict and human rights abuses, or as a result of conflict related to competition for scarce natural resources and drought-related food insecurity. Ethiopia has a long-standing history of hosting refugees, and is currently hosting the second-largest refugee population in Africa (814,535, as of April 30, 2021)\textsuperscript{34}.

These refugees hail from some 19 countries, and Ethiopia continues to maintain an open-door policy for refugee inflows, allowing humanitarian access and protection to

\textsuperscript{32} UNESCO, 2019, unpublished study on community media sector
\textsuperscript{33} Ibid.
\textsuperscript{34} UNHCR, May 2021 https://data2.unhcr.org/en/country/eth
those seeking asylum in its territory. The refugee response in Ethiopia brings together fifty operational partners, including the Government of Ethiopia’s Administration for Refugee and Returnee Affairs (ARRA), supported by UNHCR – the UN Refugee Agency – in coordination with UN agencies, and international and national NGOs. In addition to refugees, currently there are an estimated 2.7 million people internally displaced within Ethiopia.

Humanitarian organizations and government counterparts are conducting various community engagement activities to address Communication and Community Engagement (CCE) needs. The lead agency coordinating humanitarian activities in refugee camps, ARRA, has also extended its engagement to the host communities. As part of its Comprehensive Refugee Response Framework (CRRF) approach, ARRA has developed a draft communication and coordination guideline with the objective of increasing access to information and accountability among government, host communities, refugee communities, as well as other stakeholders. The guideline aims to provide a coordinated approach to providing access to information to the host and refugee communities (ARRA, 2020:6).
Following the COVID-19 pandemic, International Rescue Committee (IRC) has also drafted a risk communication and community engagement (RCCE) strategy to standardize its community engagement efforts. The draft strategy, when finalized, hopes to create a platform to provide beneficiaries with a comprehensive message, to receive feedback, and to gain the trust of the communities receiving the services. While the above efforts are ongoing, studies conducted by organizations such as DWA and IMS-Foj show that there is still a big gap in catering to information needs.

According to a study conducted by DWA in six refugee camps and host communities, access to information among both refugees and host communities is found to be low. Host communities reported better access to information channels as compared to refugees. Access to TV, radio and newspapers among refugees is reported to be very low. The barriers to accessing information, according to the study, are inadequate infrastructure, including poor roads and lack of electricity, lack of local media stations therefore language barrier, illiteracy issues, lack of adequate finances amongst others.

DWA’s assessment found that there were several barriers to accessing information amongst community members in both the host and refugee communities. The refugees’ access to TV, radio and newspapers was very low. Even though the host community had low access levels for the aforementioned facilities, they had better access compared to the refugees. The factors that influenced this low incidence included: inadequate infrastructure including poor roads and lack of electricity; lack of local media stations, therefore language barrier; illiteracy; and lack of adequate finances, among others.

Agnwak, Nuer and Amharic were the most dominant languages spoken and written in the refugee camps, as well as the host community. However, most of the media content
assessed was in Amharic. Because most of the refugees cannot speak or write Amharic, they do not listen to the local stations. Radio, TV and newspaper access was higher amongst the men compared to women. *BBC Amharic* was most popular in the host community, while *Tamazuj* (a Nuer station) had higher listenership in the refugee camps.

In these camps, *UNHCR* and the *Administration for Refugee and Returnee Affairs (ARRA)* were the main information sources (70%), while TV had the highest mentions (36%) in the urban host communities.

Community leaders played a crucial role in the dissemination of information within the refugee camps (33%). Their role in the host community, however, was not very relevant – even more so amongst the rural host community. The information provided to the community members by *UNHCR* and *ARRA* was mainly information on issues that are in-line with their mandates, and therefore, unlikely to fulfill the information needs of the respondents – even more so for those in refugee camps.

The incidence of mobile phone access is relatively high compared to access to TV and radio in both the refugee camps and host community. More than half of the members of host community have access to mobile phones with the proportion being higher in the urban areas (66%). Among those who have access to mobile phones, at least eight out of 10 have their own devices. (*DWA*, 2020)

Despite the high number of mobile phone ownership, only 18% of the respondents interviewed had access to the internet. The low incidence in internet usage was partly attributed to poor connectivity in the region, that was reportedly far worse in the rural areas and the refugee camps. The majority of the internet users (39%) were drawn from the urban host community. The low internet access translated to low social media usage in the rural areas and refugee camps, which stood at three percent and 10% respectively.

Fifty percent of the urban host community trusted TV, the most followed medium by respondents (24%), while in the rural host community, person-to-person exchange was the most trusted source of information (33%), followed by radio at 29%. In the refugee camps, the level of trust in Refugee Central Committee (*RCC)*/ARRA was at 20%,
followed closely by person-to-person exchanges at 18%. Compared to the host community, trust levels for information sources among the refugees is generally low. (ibid)

The pressing need among the refugees was for information on peace and security, as reported by 72% of the informants. Thirty-five percent of those surveyed in the host community living in the Itang urban center expressed their needs to receive news about healthcare, followed by information on the Gambella region at large at 29%, and information about the current situation about peace and security at 22%. However, because the issue of peace and security was very palpable throughout the entire reporting process, this is an important area for both refugee and host communities in the region. (ibid)

The findings of the study by IMS-Fojo mirror that of DWA’s. According to this study, in addition to low ownership of radio sets, there is lack of content in local languages. About three-fourth of the respondents reported owning mobile phones. And according to respondents, there is inadequate information regarding issues they identified as pertinent and that affect their lives, such as peaceful co-existence, conflict resolution, combating harmful traditional practices, and health (particularly HIV). Participants of the study also pointed out that the host community’s access to information is mostly through horn speakers, interpersonal communication, and mobile phones.
4. FINDINGS AND ANALYSIS

4.1 SUPPLY-SIDE INFORMATION LANDSCAPE

The assessment team conducted extensive discussions with media and non-media information suppliers in the Addis Ababa and Gambella region. This section of the assessment narrates the current media landscape in the study areas, and generates insights on the information ecosystem from the suppliers’ side. For ease of understanding and comparison for the reader, the findings from information suppliers in Gambella and Addis Ababa are presented separately.

4.1.1 Gambella

4.1.1.1 Channels of Communication

This assessment engaged with respondents from media (Gambella Regional Mass Media Agency, Gmabella Regional Press Secretariat) and non-media information providers (NGOs, CBOs, district-level administration offices, and others). According to the responses of the study participants, there is no mainstream (legacy) media that broadcasts from Gambella region – neither government, nor private sector. The regional mass media agency and the press secretariat are the bodies responsible for regional government media activities. There was a community radio station established in 2016 and ran by Gambella city administration, which only operated for two years and finally stopped broadcasting due to technical and financial issues.

The regional mass media agency produces 30 minutes of video content twice a week and broadcasts through national stations Ethiopian Broadcasting Corporation (EBC), Walta Information Center (WIC) and Fana Broadcasting Corporate (FBC), which are all based in Addis Ababa. Respondents stated that access to TV and Radio stations and mainstream media in the region is limited, particularly in the remote, because of the absence of infrastructure such as electricity, and lack of commitment from the regional government to expand access to media. A key informant, who works as a public relations officer for an international NGO in the region, explained that:
...most individuals, and institutions have limited access to mainstream media such as TV and radio in the region mainly because of the lack of infrastructure. As a result, they rely on community-based structures like elders and religious leaders and loudspeakers to communicate information with the community.

(KI respondent, Gambella)

Thus, the main channels of communication, as learned from the participants, are lower levels of government structures such as Zone, woreda (district), kebele (sub-district) and got’ (village) through which messages generated from specific governmental or non-governmental offices are communicated to all hierarchies to the grass root level.

Then the responsible team will communicate the messages to the community through horn speakers, community outreach and other social gatherings such as churches.

Key informants from both media and non-media sectors also mentioned elders and religious leaders, billboards, loudspeakers, and posters as the channels through which they communicate with their target audiences. The assessment team observed the use of billboards, notice boards and posters in Gambella and Itang towns. The findings of the study conducted in Gambella region by IMS-Fojo concur with the findings of this study. According to IMS-Fojo’s study findings, all respondents reported community events/institutions and horn speakers as the most accessed communication channels (IMS-Fojo, 2020:24).

Non-media information suppliers also added that they sometimes buy airtime from a radio station in Mettu Town, located in the adjacent Oromia region, to broadcast content to parts of Gambella. However, the respondents added that the radio station from Mettu does not broadcast regularly, reaches only parts of Gambella region, and
mostly broadcasts in Amharic. It is worth noting that almost all respondents expressed that radio listenership is very low among the community. This is mainly attributed to lack of infrastructure and lack of appealing content in local languages.

People living in relatively urban settings access information through social media platforms. Pertinent to this finding, one respondent, a chairman of a community-based organization, stated that:

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... The habit of listening to the radio is very limited among the local community, especially among the youth. As a result, many people in the area depend on community-based institutions, rituals, and gatherings as their sources of information. However, youth and literate people residing in urban areas access the internet for information.
(KI respondent, media, Gambella)
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### 4.1.1.2 Content Development and Sources of Information

In terms of content development, all study participants from the media sector indicated that there is a strict hierarchical process during content development and approval. Such strict editorial and censorship measures are put in place to ensure that the content aligns with the political, social and economic interests of the regional government. Explaining the process, a reporter said:

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Cameramen and reporters travel to the field upon invitation from sector bureaus [or] organizers to record and report on certain issues and events. This is followed by a thorough editorial and censorship process made by responsible higher officials before sending content to EBC, Fana, and Walta for broadcasting.
(KI respondent, media, Gambella)
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The study participants added that due to the limited availability of airtime, content is carefully prioritized and only issues that have high political impact and benefits for the local government are aired to the public. One of the study participants, a director of a government media institution, confirmed this, saying:

> Since we have limited airtime, we are forced to give due emphasis to political agendas more than any other issues in the region. Nevertheless, the issue of COVID-19 has gotten high attention and broader coverage to create awareness among the community.

(KI respondent, media, Gambella)

Another reporter from the press secretariat added:

> ... our media contents are expected to focus on, and cover issues related to, politics unless there are any other high-level events and pressing issues.

(KI respondent, media, Gambella)

Participants further discussed about the deliberate absence of reporting on security and conflict issues. There is no interest from the regional government to proactively report on security issues. One of the key informants from the media explained:

> ... there were times we were not allowed to report on security incidents that happened in the region at the time of the incidents ... the reason being authorities were concerned that the release of such information to the public might potentially harm the positive image of the region and negatively affect tourism and investments.

(KI respondent, media, Gambella)
The above statements demonstrate the stringent editorial process that impedes development and sharing of content, as well as freedom of expression. They also show that messages being communicated do not necessarily take into consideration the information needs of the community. This finding goes in line with other literature summarized in the desk review session regarding freedom of expression in the media landscape at a national level.

Regarding sources of information, media professionals get most of their information from concerned individuals within the government structure. Almost all participants from the media sector mentioned public relation units, woreda (district) communication offices, NGOs, and social media as their main sources of information. In addition, the participants mentioned that they gather opinions and relevant information from community members whenever needed. However, the majority of key informants agree that getting information from local government bodies is most of the time difficult.

One of the key informants from the print media in Addis Ababa shares this view about the challenges of accessing information from local government bodies. He stated:

"...journalists, especially those working for private media based in Addis Ababa, face difficulties in getting get information about government affairs."

(KI respondent, media, Addis Ababa)

On the other hand, respondents from non-media sectors in Gambella indicated that they develop content internally as per their project needs. In cases where they need information from external sources, they reach out to other organizations directly or visit their respective websites.

4.1.1.3 Audience & Reach

Discussions with the media sector revealed that people living in Gambella Town and other peri-urban areas are the only reachable target audiences via the mainstream media. Lack of electricity and other media infrastructures are identified as the main reasons for the limited reach.
Furthermore, non-media information service providers identified both refugee and host communities throughout the region (depending on their project areas) as their target audiences. It is also learned that non-media information service providers use different modalities for refugees and host communities. A respondent from an international NGO explained:

“...whenever we communicate health information to the host community, we use volunteers selected from the host communities themselves. However, whenever we want to communicate and work with refugees, we use health workers who are recruited and trained by ARRA standards. Language, cultural and other differences among the different community groups determine our ways of communication.”

(KI respondent, non-media, Gambella)

All the key informants approached for this study agree that the main factors for the reported low level of audiences and poor reach of mainstream media are associated with, among others, the absence of regionally owned radio station, infrastructure barriers like electricity, language barriers, limited attention from the regional government for development of regional media, and low literacy level of the local community.

4.1.1.4 Community Engagement

Key informants of media practitioners reported that there were few informal assessments made by the regional press secretariat to identify the information needs of the community. A respondent from the regional mass media agency confirmed this, saying “...we don’t do audience survey to gather feedback and information need at all, since we don’t have our own specific television channel.”
It was learned that informal surveys were done on an ad hoc basis through phone calls and field content recordings, but there is no official report. Another form of feedback collection mentioned is call-ins from the audience.

With regards to the languages they use to reach their audiences, all respondents from the media mentioned Amharic as the dominant language being used in the mainstream media as it is the working language of regional government, and that there is competing interest to choose one or a few of the five local languages. However, the intermittent broadcast from Mettu radio station sometimes uses three local languages: Agnuak, Nuer and Mejenger.

The non-media information service providers also mentioned that the language they use to communicate to their targets depends on their target groups. Non-media stakeholders reported using Amharic and five local languages of the region (Agnwak, Nuer, Mejenger, Opo, and Komo).

For feedback collection, informants indicated that they use their existing internal structures such as outreach workers, hotlines and offices.

The assessment also looked into information verification mechanisms of the media. All respondents from the media mentioned their editorial units as the main responsible entities that conduct fact checking and approval for dissemination. One respondent stated:

"Since information gathered through media reporters are facts from first hand sources, most of the time this information is supported by audio and video, and thus, the credibility and trustworthiness of the information among the audiences is high. (KI respondent, media, Gambella)"

Photo 7: IEA focus group discussion session in Gambella
However, the above statement demonstrates the lack of basic understanding about verification by the media sector as well. Some information provided by the government could be inaccurate unless counterchecked from the community’s end and other relevant sources.

4.1.1.5 COVID-19 and the Media

It is learned that the advent of COVID-19 has impacted the media sector in terms of content production, manpower, resource allocation, and coverage airtime and print space. The director of a government-owned media institution confirmed that the pandemic is still affecting the economy of the region by diverting the already minimal attention of the government and allocating public resources towards protection against COVID-19. This has further challenged the already strained funds in the media sector.

Participants of the study also discussed that there is widespread misinformation about the pandemic. Rumors that circulate within the community such as “COVID-19 only infects highlanders not locals” and “it is non-locals that brought the disease upon us” have fueled hate towards people coming from other locations. The assessment team confirmed the impact of these rumors first hand when a group of youth in Itang shouted “corona” at one team member who was wearing a face mask. While respondents indicated that there are efforts to address the rumors and misinformation, they are far and few. A key informant stated:

"... recently, we learned from fake news posted on Facebook which stated that black people have a natural immunity that protects them from getting infected with COVID-19, [and that it] will not survive in hot weather conditions like in Gambella region. We reported this fake information to the regional health bureau and made counter-propaganda through loudspeakers and our official Facebook pages on this specific fake news."

(KI respondent, media, Gambella)
4.1.1.6 Media Landscape

Almost all media workers agreed that currently there is more open space for the media to operate following reforms that began in 2018. However, all participants from the media stressed that there are still critical barriers that hamper the media sector to do balanced reporting and provide the public with accurate information. Absence of mainstream media (radio and television) that is not autonomously owned by the region, lack of basic media facilities and logistics (studios, video cameras, vehicles), lack of budget in the sector, absence of trained manpower, limited attention from regional officials for the media sector, and capacity gaps in media personnel are key factors contributing to the inability of the media to reach locals. Pertinent to the above statement, a reporter from the regional press secretariat stated, that:

... there are no basic media infrastructures like studios and newsrooms. Because of this, reporters record content in vehicles of the organization. Also, there is only one vehicle that is being used for transport and one camera for fieldwork. This makes it difficult to cover rural locations. Thus, we are limited to cover only the regional town unless a very urgent and important issue emerges in other areas.

(KI respondent, media, Gambella)

The respondents indicated that professionals in the media sector have made several efforts to solve existing challenges such as improving their reach to meet the
information needs of the locals of the region. They conducted a capacity and needs assessment of the media sector and reported the results to the region’s concerned authorities. According to these informants, the findings of the assessment provided key information about existing media gaps and practical recommendations that facilitate decisionmakers to take corrective measures. However, government bodies reportedly have not made efforts to solve the problems and improve the media sector.

In conclusion, the findings of the study reveals that the media sector in Gambella Regional State suffers from multitudes of challenges. Limited capacities of human, financial, material and infrastructural resources are the main ones. There are also limited platforms for the media professional trainings, experience sharing, and taking lessons from other media institutions like Fana, Walta and EBC, as well as from private mainstream media institutions. Lack of political will to improve the media landscape is inhibiting the development of an open space for the media to operate freely.

4.1.2 Addis Ababa

This section of the information suppliers’ study in the capital city involved journalists and communicators from much more diverse media sectors as opposed to Gambella. Media professionals from three government TV and radio stations, three newspapers, two private FM stations, digital media reporters and representatives of foreign-based media are included in the study.

4.1.2.1 Channels of Communication Used by Media Houses

The respondents indicated that they reach their audiences mainly through their respective channels (TV, radio, newspapers and digital media). In addition to their main channels, all respondents said they use complementary social media platforms to share content. Accordingly, all respondents from both government and private media mentioned that they share content on their Facebook pages, Twitter profiles, and Telegram and YouTube channels. Facebook received the most mentions both by media and non-media information providers as an additional means of reaching audiences. In addition, respondents from one government broadcaster and two private newspapers indicated that they also share content on their own websites.
A respondent working for a private newspaper, the Amharic Reporter, stated they use their website, Facebook, Twitter and YouTube to share news alerts, reports and analysis. “We also have a Telegram channel where we share job vacancies published on our newspaper.”

Another respondent from FBC added:

“During news hour, in addition to our television broadcast, we do live streaming via Facebook. We also upload news and other reports to our YouTube channel and official website. Our viewers can choose how to access the information we share as per their convenience.

(KI respondent, media, Addis Ababa)

The above responses indicate that mainstream media operating out of Addis Ababa are quickly adapting to new technology and digital media trends to reach their audiences. Observations and online research by the assessment team also confirmed that the media houses represented, as well as most media not included in the study, have updated digital content.
4.1.2.2 Channels of Communication used by Non-media Information Providers

Discussions with non-media information providers revealed that they use both mainstream and digital media to reach their audiences. Respondents from NGOs and CBOs shared that they use outreach workers, FM radios, billboards, posters, and notice boards to reach their target audiences. A respondent from an international NGO said:

"... For routine project-related work, we mainly engage through our outreach workers here in Addis Ababa as well as in other regions. Whenever there is a job vacancy, for example, we post it on notice boards at the office and on job portals online on [job recruitment website] ethiojobs.net. For awareness raising, we put up billboards and posters at selected locations."

(KI respondent, non-media, Addis Ababa)
A respondent working at the administration office of Woreda 02, a district of Akaki-Kality sub-city, added:

“We mainly use notice boards and speakers to reach the residents of the sub-city. If we want to invite residents to a meeting, we will drive around our woreda announcing our message via horn speakers. We also put up notices at various locations throughout the woreda. Sometimes, at sub-city level, they use radio stations to make announcements.

(KI respondent, non-media, Addis Ababa)

Most of the non-media information providers stated that they do not use social media platforms to reach their target audiences. Respondents from NGOs expressed that they use digital media mainly for job announcements, and their own websites for project updates. They also indicated that, depending on availability of funds, they broadcast through TV and radio. While the NGOs from which respondents for this assessment come do not have a regular engagement with mainstream media, they indicated that “...there are many NGOs that buy airtime from radio and television stations to communicate messages through drama and discussions.”

CBOs and governmental offices mainly depend on grassroots-level channels such as speakers, notice boards and outreach workers to reach their targets. When asked about their limited use of digital and mainstream media, CBOs and lower-level government offices identified lack of financial and

Photo 9: IEA focus group discussion session in Addis Ababa
qualified human resources as their main challenges.

### 4.1.2.3 Content Development and Sources of Information

It was learned that priority on the content produced and covered by different media institutions varies depending on the ownership, interests, and types of communication channel of the organizations. Government-owned media like *ETV* produce and broadcast content on issues such as politics, good governance, agriculture, infrastructure, technology, and social issues. Their reporting is centered on these pillars, of which major focus and resources are allocated to the coverage of political issues. The participants further stated that less focus and resources are allocated towards coverage technology and social issues.

On the other hand, respondents from privately owned newspapers, like *Fortune* and *Reporter* stated that their content mainly focuses on high-priority political issues, business, investment, and other economic issues in Ethiopia and the Horn of Africa. In addition, they cover current issues like Syrian refugees in Addis Ababa and COVID-19.

Almost all respondents stated that issues to be covered come from invitations from institutions, individual sources, and research on social and digital media, as well as prior coverage on other media outlets. Also included are direct engagement with sources or story subjects, official statements, in-person attendance and coverage of events, and tips from professional acquaintances both in media and other sectors who serve as informants.

The finding of the study further shows that content development processes vary from one media institution to the other, and across types of communication channels (radio, newspaper or TV). Compared to the private media, government media has a more extended editorial process. The following process, described by a respondent from *ETV*, more or less represents the editorial process of government-owned media outlets:
Editorial planning meetings, chaired by the CEO, are held on Mondays, whose purpose is to give out direction, assignments, and resource allocation for heads of production teams on what to cover for the week, and how. The week is broken down into daily tasks for each team to complete, after which the team heads relay these instructions to their production teams, including journalists, camera and sound crews, who go about doing the actual reporting. And in daily morning team meetings, they follow up on progress on the work each dedicated team is doing, assess performance from the previous day’s broadcast, and plan for the next day’s activities. Once the week is out, the entire cohort reconvenes to assess their performances in another editorial meeting on Fridays, again chaired by the CEO.

(KI respondent, media, Addis Ababa)

Respondents from privately owned media explained that before content is developed, story ideas are pitched by reporters or assigned by editors. The editors review the content, verify the information, and decide on what gets covered or dropped. Once reporters go out and do the actual work of reporting on the stories, the content goes through the respective hierarchies for editing, fact-checking and approval. The next processes could include coach editors, editors-in-chief and producers.

Reaffirming the above fact while focusing the verification process they follow, a reporter from privately owned newspaper publisher stated that:
"...we verify the truthfulness of information we get by cross-checking with other sources or earlier reports. A Google search of the source informant for a background check, the subject matter, or the historical context is usually a good place to start. Once stories checkout, we go on to the reporting and writing phase, whereby we use story coloring techniques such as humanizing and personalizing the story through anecdotal cases.

(KI respondent, media, Addis Ababa)

4.1.2.4 Audience, Reach and Community Engagement

Audiences of TV and radio broadcasters are identified to be mostly Amharic speaking adults residing within the coverage areas of the respective media. Private stations mostly broadcast infotainment (information about various social issues and entertainment) and thus attract younger audiences. Government-owned media have 24-hour broadcasts, and thus, they develop content for all segments of the population including children, youth, adults. Stations such as FBC and EBC have national coverage and they develop content in eight languages (Amharic, Afan Oromo, Somali, Tigrigna, Afarigna, Sidamigna, Wolitigna). They have relay stations and/or affiliates in all regional capitals. However, regarding language use, respondents from print media only employed Amharic and English to reach their target audiences.

According to a respondent from FBC, they cover more than two-thirds of the country. In addition to local coverage, TV and radio stations reach the diaspora through satellite transmission, Short Wave/Medium Wave radio frequencies and digital media. They also have local correspondents permanently stationed in Hawassa, Bahir Dar, Mekelle, Asosa, Harar, Jigjiga, and Semera. Most respondents from print media stated that their respective newspapers reach global audiences via their internet portals, but the printed newspaper is circulated in Addis Ababa and some regional capitals only.

The private media in general have a more specific target audience depending on their focus. Most private FM stations sell airtime to individuals or institutions that target specific audiences and their content mainly includes entertainment, business and social issues. Thus, their audience varies accordingly.
Respondents from all broadcasters admitted to having weaknesses at an institutional level in engaging with audiences and conducting audience surveys. Contrary to the above finding, respondents from print media stated their consistent effort to conduct audience surveys and feedback collection, like identifying which stories have been viewed on social media. One also has a digital, in-house tracking system that identifies what online content is gaining traction with their audience. Coupled with subscriber information to the online outlet such as geographical locations, income brackets, and other demographic data, there is a clear picture of what to address more in the outlet’s coverage, according to an informant from said publisher. As to the respondents, they
mostly get their feedback from direct social media engagement, or comments sections of online outlets.

Thus, this assessment found out that there is a disconnect between the media and the community when it comes to information needs and supply. Almost all respondents from media institutions (with the exception of few respondents from print media) indicated that their institutions have never done any formal audience survey to understand the information needs of their audiences.

They mentioned that they engage with their audiences through phone calls, SMS, hotline and text message and social media pages. This goes to show that it is the community that takes the initiative to reach out to the media for any feedback or issue, but the media does not actively engage with the community to identify its information needs and address them. Media monitoring and informal conversations by the assessment team confirmed the same.

The assessment found that unlike the mainstream media, three-fourth of the non-media information providers surveyed reported they engage the community in planning and implementation of their activities.

4.1.2.5 Addressing Fake News and Fact Checking

Similar to TV broadcasters, all respondents from print media stated that they have their own information verification processes before publication of content. But none of the participants reported addressing fake news.

Pertinent to the above finding, an editor-in-chief at a privately owned newspaper, affirmed that: “... there are no efforts at to follow up, and debunk every false information out there because it is a resource-intensive task,” and that they combat false information they come across during field work through their reporting.

4.1.2.6 Media Landscape

The government reform started in 2018 is the major landmark in defining the media landscape in Ethiopia in general. All respondents acknowledge changes in the media
laws and the opening up of the media space at various levels government structure. A reporter from a private FM station recalled:

“Before the reform, let alone sharing information, it was difficult to bring the different media institutions together to form a media association due to heavy government crackdown.”
(KI respondent, media, Addis Ababa)

Sharing of content to the public without some form of approval from a government authority posed a high risk of harassment, intimidation and at times detention. Coverage of sensitive issues such as security and elections were highly scrutinized and journalists, especially from the private media sector, were often persecuted, harassed and taken to jail. Because of fear of political pressures from the local government, some information sources were not open to providing vital information to the media.

Nevertheless, respondents from both government and private media still report interferences and restrictions imposed by the current government. A journalist working for international media recalled:

“I tweeted about [socio-political activist-turned political figure] Jawar Mohammed’s claims of government forces coming to his home to arrest him, which I corroborated from police sources at the time, and another about the incompetence of people in the office of the Prime Minister. I was harassed into removing both Tweets only to learn that The New York Times had broken the story [about the former] a week later.”
(KI respondent, media, Addis Ababa)
Other participants reaffirmed the above findings on interference from government, adding that the methods of interference may have changed, but there is definitely interference that hinders journalism. At times, journalistic efforts in state-run media organizations are hamstrung by requests for coverage from people higher up in government, and choosing otherwise might have consequences.

“Say a minister calls my boss to do a press coverage of some event. He is by default putting pressure on our work. My boss’s job might hinge on the choices he makes. Since both the minister and my superior are political appointees, choosing to cover other happenings is likely to have consequences on whether my boss stays in office or not. It has especially escalated these days, with the upcoming election in mind.”

(KI respondent, media, Addis Ababa)

Respondents in the TV and radio sectors from government-ran media stated that daily government activities such as events attended by the Prime Minister or other high-profile officials tend to draw most of their resources, causing shortages in the coverage of other areas.

“If we have 20 camera rigs for the day, 17 or 18 go to such high-profile events. As a result, even though we would have liked to focus on deeper investigative work, we are mostly unable. Our good governance team, that is investigation-heavy, is on the verge of shutting down for inability to function for such reasons.”

(KI respondent, media, Addis Ababa)

An informant from a state-operated TV station suggested that the way out of these challenges is setting up an independent board of governors, assigning a competent and independent chief executive, and restoring editorial freedom in the industry.

In addition to the above challenges, all respondents stated lack of resources and/or financial constraints, and access to information from official sources as yet another set of challenges. “Access to timely information from the government is still a challenge,”
mentioned a respondent. The problem is even more severe in the private media sector. The government’s ban on the advertisement of beer on broadcast media – a commodity whose ad revenue had been supporting a sizeable chunk of the broadcast media industry – has also significantly affected the economy of the media industry.

Repetition in such denial of access, or what informants called tacit means of blockage by the government to cover some sensitive issues has led to frustration, and in turn, to self-censorship. One informant revealed how some reporters refrain from reporting on sensitive issues stating that even if they were to report on them, they are sure that they wouldn’t be broadcast or published.

Although there are fewer reported cases of interference from the nation’s security apparatus, it was mentioned that the fear is always in the back of journalists’ minds. A manifestation of this fear is, again, the widespread practice of self-censorship in reporting and producing content. One informant referred to an “overabundance of strongmen in the country,” alluding to the existence of tacit forms of pressuring the media, not just by government operatives, but by anyone in a position of power, be it business interests or the activism corps advocating for causes in the country.

“Most journalists consider ramifications of their reporting, and only stick to what is not likely to backfire on them.

(KI respondent, media, Addis Ababa)

Constant backlash against journalists from the public is another challenge. In line with this finding, a reporter said:

“... [there have been] instances whereby journalists have been attacked using labels such as spy, or accused of being paid by whomever their stories are supposed to have favored.

(KI respondent, media, Addis Ababa)
On a reporting trip to remote locations in Gondar Zone of the Amhara region to report on the state of the parents of girls abducted while returning from their college stay in Oromia region, the same reporter recalls his experience:

“... [reporters] were accused by some local youth as feeding the flames of hate against their ethnicity, and we had to flee for our lives since there was no talking our way out of that situation. With what little resources we have, we need to work wisely.

(KI respondent, media, Addis Ababa)

Journalists and newsrooms have resorted to various ways of circumventing these obstacles to freely reporting on issues. An informant from a print outlet disclosed how their publication often publishes follow up stories on contentious topics a couple of weeks apart to steer clear of the ire of anyone who might be affected.

Other means respondents employ to avoid potential reprisals include making repeated and documented efforts to include in the story comments from those the reporting is likely to implicate (regardless of whether the story is factual and error-free or not), and making editorial decisions on whether to attribute stories to their authors. As one respondent revealed:

“Names of foreign correspondents and their local reporting partners are often excluded from appearing as bylines in publications these days for fear of reprisals or expulsion from the country.

(KI respondent, media, Addis Ababa)

All respondents stated having various levels of experience in covering issues related with security, conflict and elections. For example, a respondent shared his experience of covering the immediate aftermath of violence in Shashamane Town of Oromia region, where mobs had attacked residents of the city whom they deemed settlers on their land. Numerous lives were lost in the violence, and property owned by the victims were destroyed.
Regarding obstacles to covering conflicts, a news department head in one of the government-owned TV stations revealed:

> Even if including the stated position of the government in our reporting [for balance] is the editorial policy of the station, much of what we report on sensitive issues such as conflict, or large crises and government corruption go unpublished.  
> (KI respondent, media, Addis Ababa)

Among the other challenges they face while covering conflict-related issues, most respondents mentioned the added pressures of reporting in an environment where extreme nationalist sentiments in the Ethiopian populace have diminished the space for reasoned, civic discourse. Within the newsroom, challenges in covering conflict include lack of skills and proper training required for such engagements, and most importantly, the implicit biases of reporters based on their ethnicities or religious affiliations when it comes to conflict reporting. Supporting this finding, one of the respondents in a position of leadership in a state-run media stated that:

> Rather than relying on evidence-based practice in covering conflicts, [we] observe [in our reporters] the tendency of resorting to siding with whatever one relates to in their ethnic or religious backgrounds. [We] have seen such bias both in the work we produce, and in thought processes [of reporters’] assessments of information and sourcing. It’s akin to a cancer in the profession that [we] worry about for the future.  
> (KI respondent, media, Addis Ababa)

There are also conscious efforts in state media outlets not to report on some controversial issues such as religious conflicts, or repeated acts of violence against civilians such as the case in Metekel Zone in the Benishangul Gumuz Regional State. The choice of not to cover these issues is made as a matter of professional decision to not inflame tensions any further, or to deny the coverage on a nationwide media
platform that perpetrators have been known to vie for in hopes of furthering their agenda, as the same informant at a state media organization disclosed.

More than half of the respondents, also mentioned the shortage of skills and proper training, and manpower that is required for covering sensitive issues such as conflicts and elections. This is attributed to quick staff turnover that has plagued the sector due to unattractive salaries, and the risk that comes with being a journalist. Thus, not many stay long enough to acquire the skills, and those few that have stayed long enough are always mentoring incoming talent. This cyclical situation continues to dwarf the sector’s capacity to address complex issues.

The absence of a safety net for journalists’ physical and mental wellbeing that could have encouraged their truth telling is also raised as a challenge. An informant in a leadership role in a print outlet agrees with this assessment, stating that:

"I don’t want to be a hero ... Absent any mechanisms that ensure the safety of Ethiopian journalists, or rights groups that fight for press freedom, reporting on the whole truth come-what-may is not a viable option."

(KI respondent, media, Addis Ababa)

The study also confirmed that sector is still male-dominated with only a few women in positions of leadership. A female editor-in-chief in a print media stated that:

"As a woman in leadership in the media, there is an uphill battle to overcome a male-dominated work environment. My male subordinates usually found it hard to take orders from me. It took more time and energy to bring these people in line than it did to do the actual work of journalism. Although I have not experienced it personally, I come across colleagues who have faced sexual harassment both in the working place, and on reporting duty."

(KI respondent, media, Addis Ababa)
Collaboration among the Media
The respondents said that there is active exchange of information among state-operated media institutions, and other government bodies. However, it was stated that the industry as a whole is fixated in an unhealthy spirit of competition that doesn’t foster the growth of the discipline. “It’s an environment that doesn’t allow for learning or capacity building,” an informant at a state-run media organization said.

Regarding redundancy in coverage in state and political party-affiliated outlets such as Fana Broadcasting Corporate, Walta Information Center, and EBC, one respondent from one of these institutions attributes this to the top-down approach of covering issues, and the media outlets’ existence in service to their respective parties and state organs, which are often one and the same. “It is basically the same story told the same way by different people on different channels. It’s the same agenda on multiple channels,” according to the same source from the state-run organization, who suggested independence in shaping and addressing their own agenda as a way of introducing diversity into the newsroom that reflects the real nature of the nation they cover.

Contrary to experiences at state-run organizations, respondents from the private media outlets said that there is no culture of, nor willingness to, share

INSIGHTS: Media, Addis Ababa
1. Facebook, YouTube & Telegram are the most utilized secondary platforms for reaching audiences.
2. No discernable feedback loop from audiences even though all outlets have social media presence, as well as their own websites.
3. Engagement is mostly unidirectional (audience to media).
4. Although fact checking mechanisms are reportedly baked into editorial processes, fake news is generally not addressed by the media.
5. Self-censorship is a common practice for fear of reprisals from the state, or powerful entities.
6. Implicit biases attuned to ethnic, religious, or political affiliations of reporters are a major challenge in newsrooms’ abilities to cover these issues impartially, and based on evidenced facts.
7. Business models of most media reliant on advertisement, which might not sustainable in a volatile economy, as revealed by the economic impacts of COVID-19.
information and collaborate at institutional levels in content production among private media owners in the country. One respondent mentioned exchanging newsworthy information, sharing contacts, and passing along story ideas to colleagues in his own institution or others to curry favors among peers. However, he said there is no sharing of content or production resources among media houses on an institutional level.

4.1.2.7 COVID-19 and the Media

“The media sector was hardly hit with the emergence of COVID-19 that we were almost closed”, said a journalist airing a program at a private FM station. This holds true for most of the media that survive during the pandemic. Numerous TV, radio and print media outlets have closed down due to the pandemic and the subsequent lack of advertisement earnings. Says the same radio journalist:

“... We have to pay for airtime to the station and for that we need advertising. But the business companies cut their advertising budget due to the pandemic.

(KI respondent, media, Addis Ababa)

In order to cope with the adverse effects of the pandemic in the media sector, the respondents stated different mechanisms like cutting staff benefits, cancelling regular programs, asking subsides from the government, and reallocating resources for pandemic related issues.

Government-run media outlets were no different. They reported that the economic downturn due to the pandemic has slowed down revenue in their organizations significantly. A case in point: at EBC 8pm primetime news that usually ran for a little over an hour and a half including ads came down to just under fifty minutes due to lack of advertisers.

Another means of massive income generation for TV stations were holiday specials – sponsored events with the public in attendance – that brought in over a million Birr in a
single setting. These, too, had to be skipped to adhere to COVID-19 protocols. So much so that stations were at the brink of not being able to pay staff salaries. A respondent stated that they had to get budgetary support from the government for the first time in six years due to this difficulty.

In terms of coverage, the pandemic has gained more than its fair share of coverage across all platforms in the country. The government was also proactive in providing regular updates to the public, as well as the media. However, as the pandemic sustained, coverage by the media declined, and the public became less responsive to the guidelines issued by the ministry of health, which could possibly be due to messaging fatigue and competing livelihood priorities.

Misinformation and disinformation about Covid-19 have also been observed. Circulation of unconfirmed prevention methods (use of certain herbs and spices), linking the virus with conspiracy theories (an attack against Africans and the poor) and religious views (work of the devil) are some. A key informant from FBC stated that in an attempt to tackle disinformation, they had personally organized experts from health sectors to provide clarifications on the scientific realities of COVID-19 vaccinations launched recently.
4.2 INFORMATION NEEDS, CHANNELS AND PRACTICES OF CONSUMERS

This section looks into the practices of the community in terms of information sources, communication channels, information needs, and verification and feedback mechanisms. A comparative analysis of the findings from the study areas, Addis Ababa and Gambella, is done to provide a full picture of the information landscape in the capital city and other regional locations.

4.2.1 Sources of Information and Communication Channels of Consumers

The findings of the study indicate that the source of information of community members is determined by the type of information sought, their areas of residence, access to alternative channels, language and age. Residents of Addis Ababa and Gambella Town have access to mainstream and digital media. However, more than two-thirds of rural residents of Itang Woreda (district) in Gambella region do not have access to electricity and so no access to legacy and digital media. Thus, the study has determined that the sources of information of urban residents vary significantly from those rural residents. It was also learned from the discussions and observations that the level of engagement in seeking out information by individuals plays a major role in determining the sources of information.
Participants of the study reported that the government (local and federal), activists, friends and neighbors, community leaders, religious leaders and media outlets are their major sources of information. More than 80% of respondents from both locations stated that for issues such as national security, election, politics and COVID-19, the government is their main source of information.

> It is the government that is tasked with managing issues like security and other politics-related issues. So, I get information from government sources.

(FGD participant, Addis Ababa)

Friends, neighbors and community leaders received the second most mentions as sources of information. Ten percent of all respondents identified activists and foreign media and the diaspora as their main sources of information.

> I reach out to my relatives and friends via phone or I’ll check online if I need any information about a certain issue. We also exchange information when we meet for coffee, to watch football or other reasons.

(KI respondent, Addis Ababa)

All respondents from Addis Ababa and Gambella explained that they get information on the political issues from governmental and non-governmental organizations, independent journalists or channels on social media, social media channels and pages of mainstream media, mainstream media and other people.
Concerning information channels, about 60% of respondents identified social media as their main channel to access information, followed by TV at 38%. One-third of the respondents mentioned word of mouth, while 11% reported radio. Magazines and newspapers were reported as secondary information channels by only 4% of the respondents.

Analysis of the responses by area of residence and age reveals that the majority of urban residents (85%) between the ages of 18-49 mentioned social media (Facebook, Telegram, YouTube) as their main source of information. Word-of-mouth means were
the second most mentioned channel among the above age group. Radio was mentioned by about 35% of respondents mainly for infotainment programs. More than half of urban residents above the age of 50 said they access TV and word-of-mouth means as their primary information consumption channel, while about one-fifth reported social media (Facebook and YouTube) and 15% said radio.

On the other hand, all rural residents identified word of mouth and local administration (woreda and kebele) as their information consumption channels. Rural residents who have access to electricity added TV and social media (Facebook and Telegram) as additional sources of information. Respondents in all locations reported that they use their mobile phones to access social media content.

<table>
<thead>
<tr>
<th>Area of Residence</th>
<th>Age</th>
<th>Main Channel</th>
<th>Secondary Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban</td>
<td>18-49</td>
<td>Social Media, Word-of-Mouth</td>
<td>TV, Radio</td>
</tr>
<tr>
<td></td>
<td>50 and above</td>
<td>TV, Word-of-Mouth</td>
<td>Social Media, Radio</td>
</tr>
<tr>
<td>Rural</td>
<td>18-49</td>
<td>Word-of-Mouth, Horn Speakers, Social Media</td>
<td>TV</td>
</tr>
<tr>
<td></td>
<td>50 and above</td>
<td>Word-of-Mouth, Horn Speakers</td>
<td>TV and Satellite Radio</td>
</tr>
</tbody>
</table>

Table 5: Sources of information by area of residence and age group

One of the main findings of the study is that in areas with access to electricity, social media is the main channel residents use to access information. The majority of respondents in both locations (except rural residents) explained that most of the information shared through word-of-mouth means comes mainly from social media platforms (Facebook, YouTube and Telegram). Informal conversations with residents of Addis Ababa and Gambella, as well as observation by the team, confirmed that topics of
discussion in social gatherings are indeed sourced from social media. However, about 90% of the respondents reported that they do not always trust information from social media. Thus, they turn to mainstream media such as TV and radio for verification.

In addition to the above variables, access to alternative channels and language are also identified as factors in determining sources of information. Respondents from Addis Ababa have access to both mainstream outlets and digital media that mainly provide content in Amharic, English and other local languages. As a result, they reported using multiple sources to acquire and/or verify information. In cases where they prefer to get information in other languages, residents of Addis Ababa can easily access their preferred channels. However, the majority of respondents from Gambella only have limited mainstream and social media access. In addition, due to the fact that almost all the content shared through mainstream and social media is in Amharic and English, even though they have access to media, they are forced to resort to word-of-mouth means and local communications through horn speakers due to language barriers.

Vast majority of focus group discussion participants and key informants agreed that for various reasons, social gatherings facilitate exchange of information accessed via all channels. These reasons for gatherings include coffee ceremonies, *iddir* (traditional money saving schemes), group entertainment activities (bars, football viewing houses), religious events, and events organized by local administrations. Phone calls and community leaders are also mentioned as methods for exchange of information through word-of-mouth.

Photo 14: Some IEA launch workshop participants in Addis Ababa

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**Information Ecosystem Assessment:**
**Flow, Needs, and Access in Ethiopia**

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4.2.1.1 Digital Media

*Facebook* was mentioned as the main social media platform for sourcing information by all respondents who reported using social media, followed by *Telegram* (80%) and *YouTube* (75%). About one-third of respondents reported using *Instagram* and *Twitter*. Other digital/social media channels reported include *Viber*, *WhatsApp*, *IMO*, *Facebook Messenger* and websites.

It is worth noting that in addition to other content, respondents access mainstream media through social media channels. This indicates that ease of access (on smartphone) is the factor for opting to access social media over mainstream media. It is also learned that respondents' preference for digital media channels depends on the kinds of information and/or services they seek. *Facebook* is reported as a “one-stop-shop” for all kinds of information. The majority of respondents indicated that they access *YouTube* mainly for entertainment content (local serial drama shows, music, movies). About a third of respondents said they access *YouTube* for news, in addition to entertainment.

During a focus group discussion session, one of the young participants from Bole Sub-city of Addis Ababa said that “*I always get information about the country from Facebook and Telegram. I also get information from TV and radio stations and broadcasts via my Facebook account since I have already subscribed to these broadcasters’ channels.*”

Asked about frequently accessed channels, respondents reported that they access various outlets depending on the type of information they need. Accordingly, channels most reported by respondents are:
Adequacy of Information

- Facebook pages – FBC, EBC, Sheger FM, Prime Minister Abiy Ahmed’s official pages, as well as activists and journalists (Natnael Mekonnen, Elias Meseret, Seyoum Teshome, Tolosa Ibsa, Obang Metho, Tamagn Beyene)
- YouTube channels – mereja.com, Ethio 360, FBC, EBC, Sheger FM, and Hope Entertainment
- Telegram – TIKVAH-ETH, Wazema Radio, and journalists Seyoum Teshome and Natnael Mekonnen

4.2.2 Adequacy of Information

With regards to the adequacy of information, close to 80% of the respondents in both study areas believe that currently, they are not receiving adequate information. According to the discussants in Addis Ababa, the lack of access to adequate information is associated with lack of detail in information presented, difficulty of verifying information from other potential sources, personal biases, and questionable interests of information providers. Less than 20% of respondents reported that they are currently getting adequate information from several sources.

Almost all participants agreed that information expected to come from the government on issues related to security, conflicts and election often lacks details and is communicated late. This has opened the space for the spread of fake news and rumors.
If you take security for example, there are conflicts in Tigray and Oromia regions. But we get very limited, and at times confusing, information so we do not know what exactly is happening.

(KI respondent, Addis Ababa)

All participants agree that they do not get enough information about local and national situations. For them, access to information about any issues outside of their locality is very limited. A community leader from Gambella stated:

... as there are no TV or radio in this area broadcasting in local languages, most people do not get adequate and up-to-date information on issues happening in other parts of the country, or we hear about them from other friends and neighbors who have access to TV and radio.

(KI respondent, Gambella)

4.2.3 Preferences of Communication Channels

The study revealed that choice of communication channels in Addis Ababa and Gambella varies due to multiple factors. The main determinants identified are credibility, access, cost, and language (Gambella only).
Reflections of the majority of participants in Addis Ababa indicate that social media is becoming the dominant and the most preferred platform for information exchange. Eighty percent of all respondents in Addis Ababa, of which 34% were female, stated that they prefer social media to access information related to job announcements, daily news, marketing, and exchanging information. All respondents who prefer social media said they use their mobile phones to access information. However, more than half of the respondents agreed that due to high internet costs, they limit the frequency of their online visits.

“\[I only turn on my data for a few minutes to quickly check for updates or send messages. I go online two or three times a day, but briefly, because I can’t afford to buy data regularly. When I don’t have money to buy data, I sometimes stay offline for days.\]

(KI respondent, Addis Ababa)

The above comment shows that, even if social media is the most preferred channel, users might not be able to get up-to-date information due to internet costs.

The second most preferred channel for the above group was TV (65%), followed by radio (35%). Respondents who didn’t prefer social media as their first choice, about 10%, prefer TV and less than 5% mentioned radio. In addition, the study found that more than 90% of respondents in Addis Ababa and Gambella agreed that they prefer government communication channels to verify information related to politics and security.
Similarly, in aggregate, two-thirds of respondents from Gambella Town opted for social media while a quarter of these urban residents chose TV. It is learned that the majority of the respondents that prefer TV are older segments of the community. On the other hand, 72% of rural/peri-urban residents preferred announcements through horn speakers, the main reasons for this choice over other channels being lack of access to devices (TV, radio, phones), language accessibility, and lack of electricity.

**Figure 13: Preferred channels of acquiring information by area of residence**

"If there was a broadcast in our (Agnwak) language, I would have preferred TV but since I don’t understand Amharic very well, I prefer to get messages through horn speakers."

(FGD participant, Gambella)

Overall, TV was the second most preferred channel for urban residents of Gambella. Government-owned channels *EBC, Fana* and *Walta* are identified by respondents as their most preferred TV channels. The main reason for the selection of these channels is, that they provide reliable information according to respondents. Congruent to the above
findings, an FGD participant from Gambella explained: “I usually prefer to have TV more than any other communication channel because I believe the information broadcast by the government via TV is reliable and credible. In addition, most of the information obtained from TV is supported with images and videos that help us to verify the facts and truthfulness of the information.”

On the other hand, one of the respondents in the young age group in Gambella expressed personal preferences of communication channels as opposed to the above-quoted statements, saying: “... I usually prefer to use social media – Facebook, Telegram, YouTube, internet/web-based news and information – as these communication channels can be accessed via my phone easily and everywhere. In addition to this, social media like Facebook is easily accessible, easy to use and reachable to all.”

Asked if they would like to have more options, all Addis Ababa respondents indicated that there are adequate media outlets. However, the majority concurred that they would like to have channels that can verify information.

A respondent added:

“The internet is not reliable, government owned media are restricted to promote government agenda, private media have less coverage, capacity and are less trusted. It would be great to have an independent source we can verify information from and it will help if it is available on social media, TV and radio platforms.

(KI respondent, Addis Ababa)
4.2.4 Exchange of Information within the Local Community

In regard to the modes and means of communication to exchange information with friends, colleagues and neighbors, study respondents agreed that face-to-face conversations, phone calls, Facebook and text messaging are the frequently used channels to communicate and share information.

Another interesting finding of the study is respondents from Addis Ababa expressed that in recent times, they are more cautious when discussing issues related to ethnicity and politics. This is a result of the increasing ethnic conflicts and polarized political opinions that surfaced following the change of government three years ago.

The overall result of the study regarding how respondents exchange information within their locality shows that above 80% in Addis Ababa and Gambella reported using word-of-mouth means (face-to-face engagements and telephone) to exchange information. Social gatherings and hangout spots are mentioned to be the main information exchange platforms for face-to-face engagements. The platforms vary depending on gender, especially in Gambella, where female respondents reported that they exchange information during coffee ceremonies, church and market place. On the other hand, male respondents identified hangout spots (bars, TV viewing houses, cafes), community meetings and market places.

“The Unless I am certain about a person’s political opinion, I prefer not to engage in political or ethnic discussions to avoid potential fallout. Everyone has become very sensitive about the situations happening throughout the country and have strong opinions. Thinking along ethnic lines is becoming increasingly common.

(KI respondent, Addis Ababa)
4.2.5 Information Needs and Access

Key informants and FGD participants were asked about the kinds of issues they would like to be regularly informed about. Accordingly, the majority (80%) of study respondents in both study areas would like to be informed regularly about any new developments related to national politics, and peace and security of the nation. In addition to nation-wide peace and security issues, most respondents from Gambella indicated that they would like to get regular information about the local security situation within the region and the neighboring country of South Sudan.

“We share a border with South Sudan. So, whatever happens there affects us. If there is conflict there, refugees come here. Armed groups also cross the border at times and attack locals, abduct children and loot cattle. So, getting regular information will help us to make decisions.

(KI respondent, Gambella)

One-fourth of respondents from both locations identified health-related issues, economic situation and price of goods as their needs.

“[COVID-19] is affecting all aspects of everyone’s lives. We need to get informed about the disease and vaccinations. But with the emergence of [COVID-19], all other health and social issues are not being given due attention. For example, I heard HIV is on the rise again, but I don’t hear anyone talking about it. We need to get informed about other health issues as well.

(KI respondent, Addis Ababa)
In addition to the above, 10% of respondents from Addis Ababa said they would like to get regular information about job opportunities and entertainment-related issues (sports, music, drama). About a fourth of respondents from Gambella would like to be informed about early marriage, harmful traditional practices, and education programs. One of the KI respondents in Gambella stated: “People in Gambella are mostly traditional and still practice various harmful traditions. Thus, there needs to be a media which can best reach the community widely and educate them to bring desirable behaviors and reduce the negative impacts of traditions, norms and cultures.”
4.2.6 Community Satisfaction with information Received

About 75% of the respondents in Addis Ababa are not satisfied with information they are currently getting from various sources. They have cited multiple factors including lack of details, reliability, and sources for verification.

"The government and social media activists share information about security and other situations in the country. Most of the time their information is incomplete and inconsistent. You hear parts of the news from the government and the other part from activists. Sometimes they might even share conflicting stories. So, some information leaves you with more questions than answers."

(FGD participant, Addis Ababa)

Moreover, respondents stressed that information coming from both social and mainstream media is often not free from bias, and at times based on rumors. Highlighting this point, a respondent said:

"Information coming especially from social media is very questionable... For example, recently the government declared that it successfully eliminated [an Oromo rebellion] militia leader. Some other individual activists, on the other hand, spread news saying the rebel group is taking the upper hand and has captured some towns in Oromia region. Which one would you believe?"

(KI respondent, Addis Ababa)

In the case of Gambella, all respondents agreed that they get very limited information mainly because of lack of access and language barriers. Thus, they reflected that none of them are satisfied with their existing, extremely limited, access to information. A response from an NGO employee and respondent from Gambella demonstrates the level of information gap in the region:
I travelled to a rural village in Gambella a while ago and found some community members who still have no information about the change of government three years ago and the replacement by Dr. Abiy of the former PM. From that visit I learned that most of the rural people in the region are completely detached from events taking place in the country. This calls for utmost effort among all development actors to shift existing information gaps. (KI respondent, non-media, Addis Ababa)

Equally important, a significant proportion (about 30%) of study respondents in Addis Ababa have also admitted that they are satisfied with the information they currently access through already existing sources of information. They clearly stated that although there are diverse and alternative sources of information to get information, they expressed their concerns about the sources and quality of information.

4.2.7 Decision-making based on Available Information

In general, almost all the study participants in Addis Ababa agree that information they receive from different sources are partly helpful to make informed decisions. While two-thirds of the respondents stated that they question the quality of information they are getting, they believe that some of the information they get helps them to make informed decisions.

I had a business trip to a town called Assosa and if you go on land, you need to go through Oromia region to get there. I was planning to go by car. I heard on the news that the government was conducting an operation to eliminate Oromo rebels. I checked with other sources about the news and found it to be true. So, I decided to fly instead of driving. (KI respondent, Addis Ababa)
While almost all respondents in Gambella agreed that due to absence of, or limitations to, access to information about national issues, the majority expressed that information they get locally through word of mouth informs them more in their daily lives.

“If I need some information, I ask people around me or make phone calls. Additionally, information I get through horn speakers informs my daily life more than the information I get from other media.

(KI respondent, Addis Ababa)

4.2.8 Access to Information on COVID-19

The entire participants of the study in both study areas said that they have been hearing about COVID-19 regularly mainly through radio and TV. According to the respondents, COVID-19 gets the most coverage both through government and privately owned outlets, as well as on social media. Thus, respondents in all the study areas had confirmed getting enough information about the pandemic. However, some of the respondents in rural Gambella reported that they get information on COVID-19 via announcement by loudspeaker, Facebook, NGOs and government bodies.

It was learned that there are still lots of myths and false assurances associated with the spread of the COVID-19 pandemic. Some link the pandemic to spirituality, nutrition, and weather conditions. Thus, the study learned that there needs to be rapid access to accurate information from verifiable sources to reduce the prevalence of the pandemic.
4.2.9 Trust & Influence

The results of the assessment revealed that respondents have varied opinions when it comes to trusted sources of information. The responses show that trusted channels depend mainly on information type, location of residence and age of respondents.

Three out four urban residents aged 50 and above-mentioned TV as the most trusted source of information, and about half of the younger-aged urban residents mentioned TV as the most trusted source.

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“I trust TV because it is supported by video and also, they have better access to the relevant people to get information, like high level government officials. That helps to get the right information.”

(KI respondent, Gambella)
More than half the respondents aged 50 and above said they trust government-run TV channels (*EBC* and *Fana*), and the remaining mentioned privately-owned TV stations (*ESAT* and *EBS*). Among the older respondents, radio comes in as the second most trusted source of information (*VOA, Ethiopian Radio* and *Sheger FM*).

On the other hand, among respondents under the age of 50, while TV comes at the top, about a third mentioned social media as their trusted source of information. A young respondent from Addis Ababa shared:

-quote-

*I have some channels I follow regularly. Depending on the information I seek, I visit those channels. For example, if it is related to politics, I usually check a Telegram channel called TIKVAH-ETH. They do fact-checks so I like that. If I want to check the market for some items, there are few I visit such as Ethio-Amazon on Telegram and ‘Buy/Sell Anything’ on Facebook.*

*(FGD participant, Addis Ababa)*

-quote-

*EBS, EBC & Fana, ESAT* are the most trusted TV channels among respondents.

Among rural residents of Gambella, community and religious leaders are reported to be the most trusted sources of information. Local administrations are mentioned as the second most trusted. According to a resident in Itang: “... *elders, and community and church leaders are the most respected and trusted [sources of information]. Even the government, the community themselves and others come to them first if they want to communicate sensitive and high priority issues.*”

However, it is worth noting that with limited alternative information channels, rural residents do not have much to choose from.
And with lack of options, the influence of local structures becomes much higher. In terms of trust by information type, about two-thirds of the respondents agreed that they trust government-run TV and radio channels, and Sheger FM (Addis Ababa) for issues such as peace, security and politics. About 25% of the respondents mentioned social media channels and activists as their most trusted sources while 10% mentioned the VOA, DW (Deutsche Welle) and ESAT.

"I used to watch ESAT for political issues before. Since PM Abiy came, government media has improved a lot, but still has major gaps in providing adequate information. But there is no other credible source you can go to, to verify information."

(FGD participant, Addis Ababa)

Except the channels/individuals mentioned from social media, respondents stated that they do not rely on social media to get accurate information and make decisions.

"Most people who disseminate information on social media worry about the number likes, shares and views of their message, not its content and the negative impact it will have."

(KI respondent, Addis Ababa)
5. CONCLUSION AND RECOMMENDATIONS

5.1 CONCLUSIONS

The findings of the assessment have clearly shed light on the information ecosystem of the areas in focus. Based on the analysis of responses, the following conclusions are drawn:

5.1.1 Supply Side

i. There is a more open space for the media to get information and share with the community since 2018. However, there are still major gaps in the areas of access to timely information by the media, infrastructure for mainstream media in the regions, technical capacity of media practitioners, and information verification mechanisms.

ii. There is a visible difference in the media landscape between the capital city, Addis Ababa, where there are adequate channels and a relatively better access to information, and Gambella, where there is next to no access to mainstream media, very poor infrastructure, and a restrictive government structure. Triangulating the findings of this study with previous studies confirms that, while the media landscape in most other regions is better than Gambella, access to information by the media is limited and there are extensive structural and systemic challenges that restrict the media space.

iii. Feedback and information verification mechanisms and practice is low among the media interviewed in this study. And this is the result of lack of awareness and resources to establish and practice the mechanisms.

iv. Legacy media are quickly adopting to the digital media as complementary to their mainstream channels. But due to lack of a well-regulated digital media and the limited efforts and/or capacity of the government to enforce the existing laws,
misinformation and fake news on social media has significantly eroded the recipients’ trusts.

v. There is limited practice by non-media stakeholders to engage with their target audiences via mainstream and digital media. This is attributed to lack of resources, community engagement expertise, and awareness.

5.1.2 Consumer Side

i. There is a dire need for credible and accurate information. Fake news, rumors, misinformation and delayed information have frustrated consumers. The absence of adequate verification sources has forced consumers to rely mainly on government-ran channels for national issues.

ii. Consumers in Gambella region are almost denied of information services due to the lack of commitment by the regional government. This has severely restricted the flow of information to mainly word-of-mouth means, and local channels.

iii. Social media has become a game-changer on how the community receives and shares information. It has provided a much freer space, convenience for access to a wide range of channels using mobile phones. However, due to hate speech, fake news, and misinformation, consumers’ trust of information from social media sources has slumped.

iv. Word of mouth is still the most widely used and trusted channel to exchange information. Social gatherings of various sorts provide the platform for the consumer.

v. In areas with electricity, television and social media have the most consumers. Urban residents also access radio mainly for infotainment programs.

5.2 INSIGHTS AND RECOMMENDATIONS

Based on the conclusions of this assessment, the following insights and recommendations have been drawn:

1. Capacity building of media professionals: Media professionals need to get more knowledge on social media content development and management, feedback and verification mechanisms.
2. *Creating awareness about media and communication among government structures:* Officials in the lower government structures determine the successful execution of laws and regulations. Therefore, creating awareness on existing laws and regulations, as well as accountability, could facilitate better access to information for consumers.

3. *Creating awareness about CCE and media for non-media information providers:* NGOs, CBOs and other similar structures can benefit from having a better understanding and tools about community engagement and communication in the era of digital media.

4. *Designing localized approach to best serve consumers:* Conducting further assessment and developing a communication strategy relevant to the intended consumer is key in successfully implementing a media and communications-focused intervention.

5. *Advocating for information verification and feedback mechanisms:* capacity building of existing platforms, providing financial and technical support, and advocating for the establishment of these systems can contribute to tackle fake news, rumors and misinformation.

6. The findings of this assessment are not conclusive about the study areas. Thus, further study needs to be done based on the objectives of the envisaged intervention.
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7. LIST OF ANNEXES

- Annex 1: Key Informant Interview Guide for Community Members (Consumers)
- Annex 2: Key Informant Interview Guide for Media
- Annex 3: Focus Group Discussion Guide
- Annex 4: Key Informant Interview Guide for Non-media stakeholders
- Annex 5: Observation (Mini-ethnographic Research) Guide
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