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August, 2023

Ethiopian Digital Media Information Ecosystem Assessment

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Local voices. Global change.

Ethiopian Digital Media Information Ecosystem Assessment

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Executive Summary

Ethiopia remains to be one of the least connected countries in the world. However, digital media continues to play a crucial role in the socioeconomic and political life of digital media audiences. Yet, only little is known about the nature of the burgeoning digital media audience and the key online information providers. This research report aims to provide a comprehensive assessment of the digital media landscape in Ethiopia, focusing on understanding audience behavior, preferences, and the practices of content creators.

THE STUDY CONSISTS OF TWO PARTS:

1. **An analysis of digital media audiences**
2. **An analysis of digital content creators**

The first section or the audience survey explores various aspects of digital media use in Ethiopia. It examines the nature of digital media users, social media use, time spent on digital media, frequency of usage, motivations for using social media, and audience preferences for content formats and digital media platforms. It also assesses trust in digital media, information disorder, techniques used to identify dis/misinformation, and online media literacy education. The survey also explores recent developments in telecom services, including tariff reduction, Wi-Fi accessibility, and expenditure on internet services. The analysis of the digital media audience involved a survey and qualitative research approaches. The survey used a structured, close-ended questionnaire designed based on theoretical and empirical reviews. A total of 429 survey respondents participated, and three additional focus group discussions were also conducted. The second part of the research focuses on content creators, analyzing their platform presence, audience profiles, content production practices, engagement levels, and institutional and business models. It examines the diversity of platforms used, reach, audience demographics, understanding, media formats, content preferences, content volume, and sources of information, engagement strategies, and various aspects of the institutional and business infrastructure. For the analysis of digital media outlets or content creators, the research relied on observations, interviews, and focus group discussions. A total of 18 key informant interviews and two focus group discussions were conducted with digital media content creators in Addis Ababa, both in-person and online. The study was conducted between March and June, 2023.

Based on the findings, the study concludes that digital media outlets in Ethiopia cater to a diverse audience in terms of demographics, interests, and platform preferences, primarily focusing on urban areas and individuals with internet access. The most common formats used are text, video, and images, often through content recycling and repurposing. While Facebook and YouTube are the most preferred platforms for content consumption, Facebook stands as a less trusted platform among the audience (ranks 4th). Audiences prioritize quality entertainment, current information, reliable reporting, and educational value content, while content creators mostly cover topics like politics, business, and social issues.

Ethiopian users spend 2 to 4 hours daily on digital media, mainly accessed through smartphones. Online misinformation is widespread, and platforms like Telegram, websites, and YouTube are more trusted. Connectivity challenges, high staff-turnover, and limited advertising opportunities hinder content production and distribution. Digital media outlets engage with audiences through various platforms, targeting youth with a higher proportion of male users. Editorial systems, physical infrastructure, and revenue models vary among digital media outlets.

The study recommends that media organizations enhance digital literacy and fact-checking skills, diversify revenue streams, utilize digital storytelling tools, and access training programs. It suggests that government institutions streamline administrative procedures and provide incentives for digital innovation. Media development organizations are encouraged to offer capacity-building programs, provide financial and technical support, and collaborate on media literacy initiatives and fact-checking platforms. Acting on these recommendations could help mitigate challenges related to content production, verification, revenue generation, media literacy, and collaboration.

Purpose

The purpose of this study was to conduct a comprehensive assessment of the digital media landscape in Ethiopia. The study aimed to gain a better understanding of how information is produced and consumed in the digital sphere. It sought to identify challenges and opportunities within the digital media landscape and provide clarity and analysis on the main news and information providers, the type of content they produce, ownership types, and business models.

One key objective was to explore the growing influence of digital media in Ethiopia even though the country has one of the lowest internet connectivity rates globally. The study aimed to understand the type of content people consume online, their frequency of consumption, and their preferences. It also focused on digital media audiences in Ethiopia, their preferred social/digital media platforms, time spent online, factors driving their media consumption, type of information/content sought, and trust levels in various media sources.

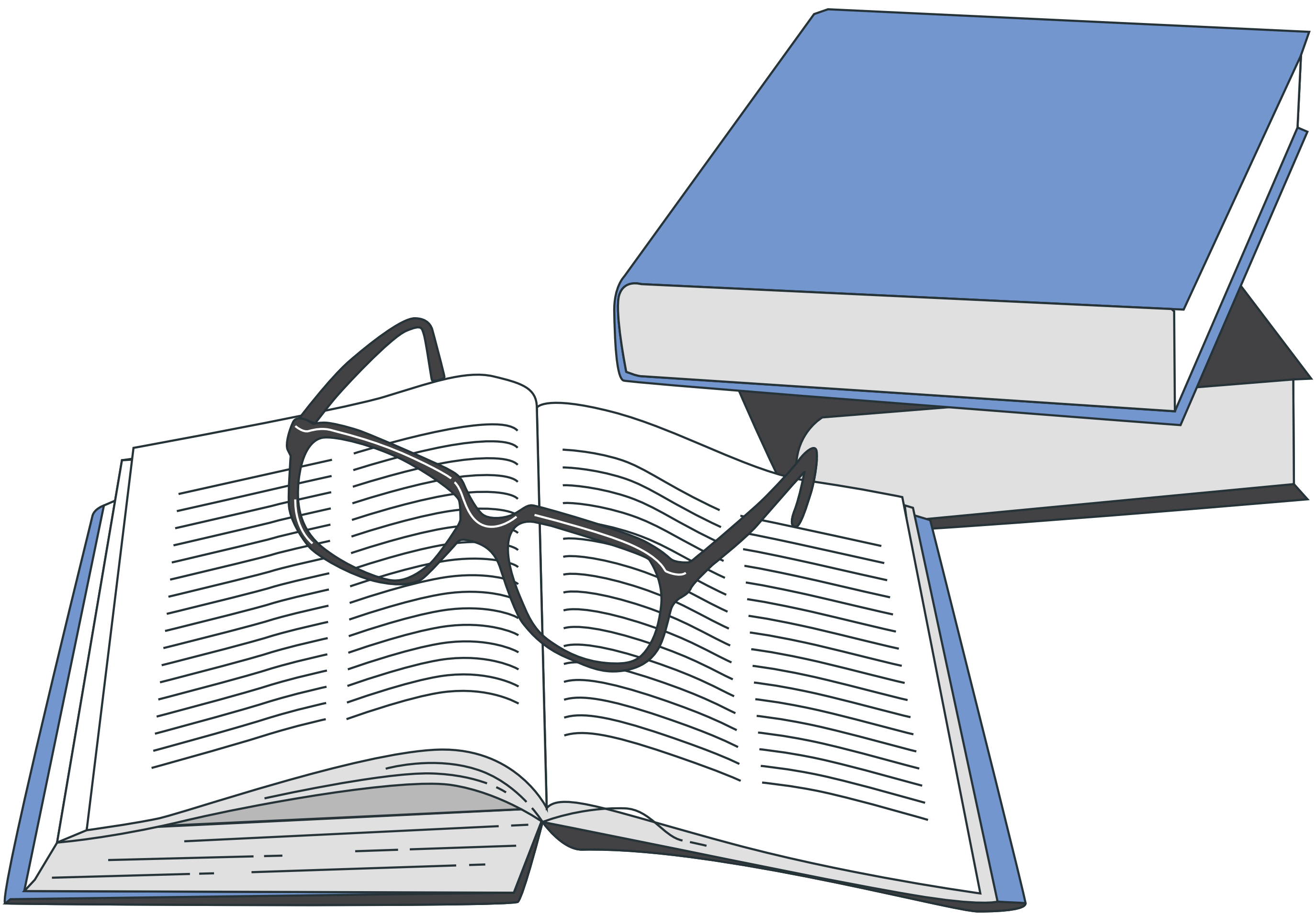
By examining changing habits and behaviors of digital media consumers in light of growing opportunities such as improved internet connectivity and alternative service providers, the study aimed to uncover valuable insights that inform content creators and influence decision-making processes.

Furthermore, the study aimed to map the physical and institutional infrastructures supporting digital information production and flow. This includes media outlets, distribution systems, and production units, along with their ownership structures. It also focused on understanding the driving factors behind the expansion or creation of digital media content, sources of information input for content creators, methods employed to verify information, and revenue generation models.

Purpose

This assessment of the digital media landscape in Ethiopia provides a comprehensive understanding of information production and consumption in the digital sphere. It highlights challenges and opportunities within the sector and offers valuable insights to support interventions promoting access to quality information for both digital media producers and consumers.

The study was conducted between March and June, 2023.



1 Background: The Ethiopian Digital Media Situation

Media Landscape

The independent media in Ethiopia has a history dating back to the 1990s. Since then, it has undergone both positive and negative developments. The media experienced phases such as repression under authoritarian regimes, followed by liberalization and expansion from 1992 to 1996. However, there was a clampdown from 1996 to 1999, and after the 2005 national election, hostility towards the media resurfaced, leading to a decline in its expansion in the early 2000s.

Under the leadership of Prime Minister Abiy Ahmed, who assumed office in 2018, the media landscape in Ethiopia has become more open and diverse. Previously detained journalists have been released, and the blocking of over 260 websites has ceased. These significant changes in 2018 resulted in Ethiopia making substantial progress in the press freedom ranking of Reporters Without Borders (RSF).

Furthermore, a more liberal media law was adopted in 2021, providing a legal framework for the protection of journalists. This law decriminalizes defamation and safeguards journalists' sources. However, despite these positive developments, there are still instances of arbitrary arrests of journalists. Critics argue that the terrorism law and the law on hate speech can be used against journalists. Over the past five years, numerous journalist arrests have occurred in connection with protests, conflicts, and the war in northern Ethiopia.

Currently, there are five officially recognized and registered media categories under the Ethiopian Media Authority (EMA): public media, commercial media, community media, religious media, and digital media. The public media includes nine radio stations, ten television stations, and nine periodicals. The commercial media comprises 14 radio stations, 25 television stations, and 17 periodicals. The community media platforms registered to date include 54 radio stations and seven television stations. The number of recognized religious media outlets has grown, with 37 television stations operating as of June, 2023. The digital space is also witnessing rapid expansion, with 57 registered internet-native media outlets overseen by the EMA.

The Ethiopian media faces challenges related to professionalism, which leads to associated problems. Various political, economic, cultural, religious, and ethnic groups have captured the media, each promoting their specific agenda during the political transition. This compromises the safety of journalists, both from state and non-state actors. Other challenges include polarization, weak financial and market positions, and technological gaps. Research indicates that media polarization has increased alongside the expansion of media and the broader press freedom resulting from political reforms. This polarization is fueled by ethno-nationalistic media outlets with diverse origins and ownership on one side, and pan-Ethiopianist outlets on the other (Skjerdal & Mulatu, 2020)).

Digital Media Landscape

The history of mass media in Ethiopia covers less than a century, and the introduction of digital media is even more recent. In the late 1990s, significant internet-based public platforms began emerging, such as Nazret.com, Ethiopian Review, Ethiomedia, and others. These platforms mainly served as political blogging platforms created by the diaspora community for the Ethiopian audience. It is important to note that there were also news blogging sites like Aiga Forum, run by the diaspora, which were widely seen as pro-government.

During the mid-late 2000s, there were few local internet-native outlets in Ethiopia. Ethiopian-based news websites like New Business Ethiopia (which is still operational) and the now-defunct Jimma Times were exceptions. Mainstream media outlets in Ethiopia had some online presence through news websites that replicated their offline platforms. However, these websites limited audience engagement opportunities, such as comment sections, due to concerns about accountability in heated political debates.

In the late 2000s, Awramba Times and Addis Neger migrated from print to online platforms, further expanding the Ethiopian digital media landscape. Existing literature on Ethiopia's digital media scene presents a unified perspective on its early development, emphasizing its origins as a diaspora-led platform focused on challenging the government.

Over time, professional journalism outlets emerged, and local digital media presence developed, mostly as extensions of mainstream media organizations. However, they did not play significant roles either in revenue generation or content distribution. Scholars like Skjerdal (2014) and Gagliardone and Brhane (2021) argue that factors such as state control, underdeveloped telecom infrastructure, and unclear revenue models contributed to the slow progress of the online media system in Ethiopia. The Oromo Protest, which began in 2014 in response to a proposed Addis Ababa Master Plan, redirected digital media in Ethiopia towards digital activism and citizen journalism. Many people agree that digital influencers and activists, primarily based in the diaspora, played an indispensable role in hastening the fall of the EPRDF administration and bringing the current prime minister to power in 2018.

Digital journalism has flourished with the expansion of press freedom following political reforms in Ethiopia. However, the digital media landscape reflects the country's political landscape and has faced criticism for exacerbating political polarization, inciting conflicts through misinformation and disinformation, and spreading hate speech. As a result, the Ethiopian disinformation and hate speech proclamation was enacted after much debate and resistance from the sector. Nevertheless, the recent Tigray war has once again propelled digital media to the forefront of the information ecosystem in Ethiopia.

Despite these developments, the digital media space in the country has yet to address the issue of reconciling digital activism and journalism. This challenge was evident in the digital dilemma faced by the new media law. While content creation on digital platforms is no longer exclusive to institutional outlets, regulating citizen interaction on social media may infringe upon the right to self-expression. The new Ethiopian media proclamation attempted to address this issue by recognizing and registering online media platforms only if they have institutional arrangements and editorial processes (Tadeg & Shiferaw, 2020).

The Infrastructure

The telecom infrastructure expansions in 2006 and 2011 brought significant changes to Ethiopia's digital media landscape. The improvements in connectivity and data rates during the late 2010s elevated access to digital media to new heights. However, a 2020 BCC media audience survey, cited in another study on Ethiopia's information ecosystem, revealed that digital/internet-based media platforms are not the preferred primary sources of information for approximately 12% of the 2,000 Ethiopian media audiences surveyed. Radio and TV platforms are favored more significantly. In contrast, the ecosystem assessment study found that 80% of the media audience preferred social media for both socialization and news and information consumption.

As of 2023, internet penetration in Ethiopia stands at

16.7%

With around 21 million people regularly accessing the internet.

There are **67 Million** Cellular connections, covering

53%

of the population.

DataReportal (2023) reports

6.4 Mil

Social media users in Ethiopia,

With Facebook being the overwhelming preference for

6 Mil

Users.

Approximately one-third of internet users in Ethiopia have a Facebook account, of which two-thirds are male, accounting for less than 10% of the overall population.

Messenger is the second most popular platform with

1.04 Mil

Users

Followed by LinkedIn with

870,000

users,

Instagram with

612,000

Users,

Twitter with just above

90,000

users.

The BBC Audience Survey also found a strong preference (above 92%) for Facebook and Twitter platforms, followed by IMO, Telegram, and WhatsApp.

Despite significant infrastructure investment, Ethiopia's connection speed remains among the slowest globally.

The median download speed for cellular mobile internet connections is below

20Mbps

While fixed internet speed is four times slower. Safaricom, a new entrant, outperforms the long-time monopoly Ethio-telecom, providing a median download speed of 32Mbps with higher consistency.

2 Research Approach and Methodology

The research report comprises two main sections of analyses:

1. **Digital content creators**
2. **Digital media audiences.**

To ensure a comprehensive analysis of the digital media landscape, a combination of qualitative and quantitative research methods has been utilized.

The first part of the study investigates the characteristics of the digital media audience in Ethiopia. Specifically, it explores the audience's preferences for content and media, the level of trust in digital media, preferred telecom services, the prevalence of online misinformation, and patterns of internet usage. The analysis for this section combines quantitative (survey) and qualitative research approaches (focus group discussions).

The second part of the research focuses on the examination of digital media outlets or content creators in Ethiopia. This analysis is based on several research techniques including observation, interviews, and focus group discussions. A total of 18 key informant interviews and two focus group discussions were conducted with digital media content creators. These interviews took place both physically and online in Addis Ababa, spanning from April 15 to May 30, 2023. The quantitative data was collected through a structured, close-ended survey questionnaire designed based on theoretical and empirical reviews. Overall, the data for the second part of the study was obtained from a survey involving 429 respondents and two focus group discussions.

2.1 Sampling Procedure

The study aimed to map the digital media landscape in Ethiopia, specifically focusing on two major regions, Oromia and Amhara, and one city administration, Addis Ababa. Due to the large size and wide geographic coverage of the study population, a preferred technique for sampling is multi-stage sampling. According to Onwuegbuzie and Leech (2007), the use of multi-stage sampling involves selecting a sample in multiple stages when the population is large or its members cannot be easily identified.

To ensure diversity and coverage at geographical and demographic levels, a multilevel cluster sampling methodology was envisioned. Based on other projections, Adama (Oromia), Gondar (Amhara), and Addis Ababa are logical choices as they are among the top urban and population centers in their respective regions and in Ethiopia as a whole. According to Population Stat, a global population data source, Adama, Gondar and Addis Ababa are projected to be among the top five urban city centers in Ethiopia in 2024, with population estimates of 448,000, 431,000, and 5.7 million (higher than the CSA projection), respectively.

Therefore, Adama, Gondar and Addis Ababa were selected as the first-tier geographical clusters for the audience survey, representing the two regional territories and one city administration indicated by the project scope. The sample size was equally distributed among the three geographic clusters, with each supporting 143 sample observations.

At a secondary level, a purposive sampling approach was applied to further divide each sample cluster into six secondary sample groups or clusters based on occupational/employment status. These incorporate:

1. Government employees (or managers)
2. NGO and Civil Society Organizations (CSOs)
3. Private sector employees (or managers)
4. Informal sector employees and self-employed people
5. Students (high school, college, and TVTE)
6. Unemployed people

To determine the survey sample size for our study population with an unknown/indeterminate size, we employed the sample selection formula commonly used in complex social science studies. In our case, we assumed a 95% confidence level with a margin of error of +/-5%. This calculation yielded a sample size of 385. To account for potential non-response rates, we added an additional ten percent to the sample, which resulted in a final sample size of 429.

2.2 Data Analysis Procedure

This research study employed a mixed research method. The data that was collected through the above methods and procedures was analyzed based on the nature of the data. For instance, the quantitative data collected by using survey method was analyzed through descriptive and inferential statistics. Descriptive statistics such as percentages, cross tabulation, means and standard deviations were employed to assess the audiences' content and media preferences, level of trust on digital media, preferred telecom service, magnitude of online misinformation, and internet usage patterns. On top of this, an inferential statistics, specifically independent sample t-test, was used to see gender and age group differences.

On the other hand, the qualitative data, which was gathered using key informant in-depth interviews and FGDs, was analyzed thematically. Words and phrases from these conversations were coded and recoded with appropriate qualitative research coding systems. Then, groups of related initial themes were grouped, merged, analyzed, and interpreted

2.3 Analytical Framework

In this assessment, an attempt was made to gain insights into how digital news outlets function in Ethiopia; what human and physical infrastructures are required; the processes involved in digital content creation; and how audiences access, consume, and evaluate information and news distributed in digital platforms. The assessment intended to explore the impact of recent improvements in the country's telecom and ICT ecosystem regarding access, affordability, availability of alternatives, and convenience as primary determinants of digital media production, distribution, and consumption.

In essence, the assessment is an exploratory research project that seeks to understand the 'what', 'how', and 'why' of Ethiopian digital media production, distribution, and consumption. It intended to triangulate its investigation from two distinct points of view: content creators' and content consumers' perspectives. Accordingly, the study employed several data gathering and analysis methodologies under qualitative and quantitative research strategies.

Part I. Audience Survey

3 Digital Media Audience Survey

3.1 Demographic Information

The first section of this report is dedicated to presenting the results of the audience survey. A total of 429 individuals have participated in the survey. About 64% of the respondents were male and 36% were female. We received a higher response from the 19 to 29 age group (55.2%), followed by those within 30 to 55 age range (37.8%). Only a handful of them (4.7%) were 18 and under 18 years of age. In terms of geographical location, the respondents were evenly distributed among Addis Ababa City Administration (34.3%), Oromia (33.6%), and Amhara regions (32.2%). The respondents come from a range of employment statuses: government employees (17.9%), private sector employees (17.0%), unemployed people (16.1%), students (17.2%), NGO/CSO employees (14.2%), and those in the informal sector/self-employed (17.5%).

TABLE 1 | RESPONDENTS' DEMOGRAPHIC PROFILE

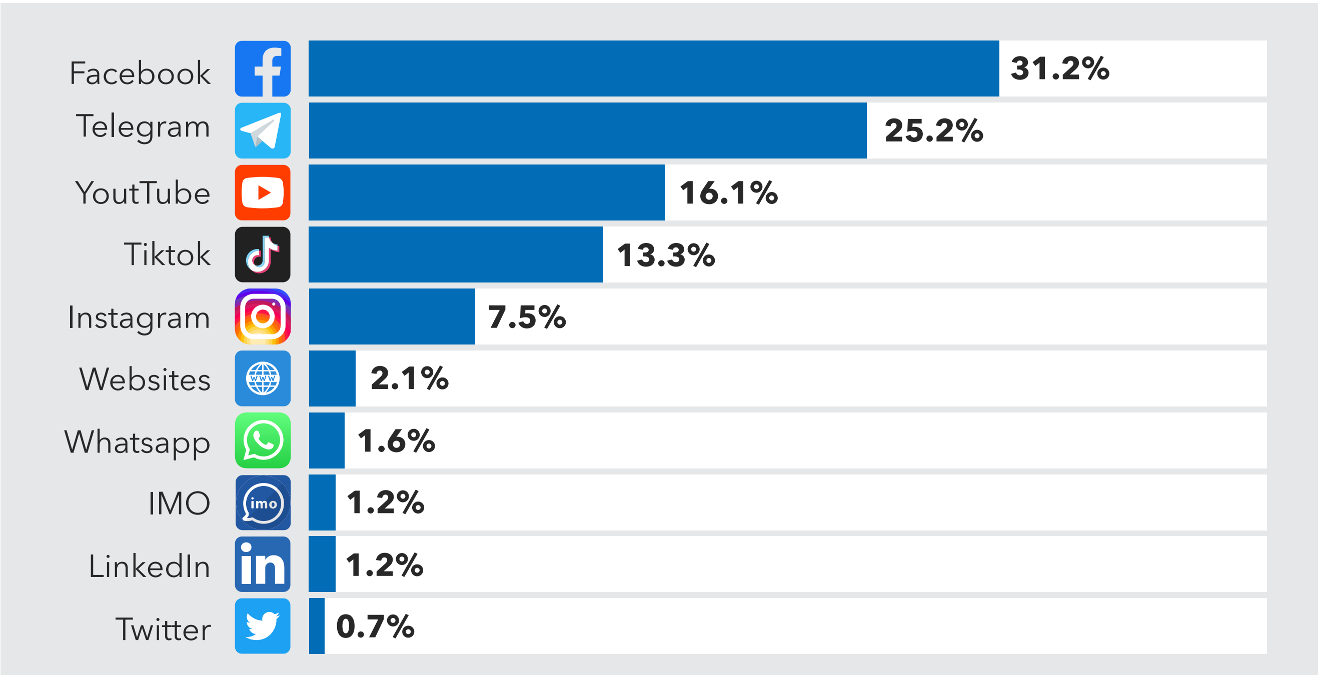
	Frequency	Percent
Gender		
Female	153	35.7
Male	276	64.3
Total	429	100
Age		
≤ 18 years	20	4.7
19-29 years	237	55.2
30-55 years	162	37.8
> 55 years	10	2.3
Region		
Amhara	138	32.2
Oromia	144	33.6
Addis Ababa City Administration	147	34.3
Employment Status		
Government Employee	77	17.9
Private Sector Employee	73	17.0
Unemployed	69	16.1
Student	74	17.2
NGO/CSO Employee	61	14.2
Informal Sector Employee/Self	75	17.5

3.2 Understanding Digital Media Use in Ethiopia

3.2.1 Social Media Use

The study found Facebook, Telegram, and YouTube to be the three most preferred social media platforms in Ethiopia. Being chosen as a first digital media preference by 31.2% of the respondents, Facebook became the audiences' most preferred social media site. This was followed by Telegram (25.2%) and YouTube (16.1%), which accounted for the second and third places as audiences' first digital media preferences. TikTok (13.3%) and Instagram (7.5%) took the fourth and fifth places, respectively. Interestingly, Twitter (0.7%) was the least preferred social media platform together with IMO (1.2%), and LinkedIn (1.2%), which were placed in the far end of the continuum in the audiences' preferences (See Figure 1). The findings of this study are consistent with previous research which found out that Facebook was the main platform for sourcing information in Ethiopia.[1] [2]

FIGURE 1 | **AUDIENCES' MOST PREFERRED SOCIAL MEDIA PLATFORM**



1 Information Ecosystem Assessment, 2021
2 BBC Media Action - Media Audience Survey, 2020

Cross-tabulation was done to find patterns on variables between gender and region of the respondents and across individual social media outlets. The results show that male respondents dominate in many of the social media outlets including Facebook, Telegram, and YouTube, among others. However, a slightly higher number of women users have been seen on TikTok, WhatsApp, and IMO.

The study also asked participants to indicate their second and third most preferred digital media sites. Here again, Telegram (29.8%), Facebook (19.6%), and TikTok (19.1) appeared on top of the list of respondents' second most preferred social media outlets. Telegram (22.6%), TikTok (21.9), and Facebook (14.9%) appeared as the third most preferred social media sites to the respondents (See Appendix 2 and 3 for the details). In general, the findings of the survey data vividly indicated that Facebook, Telegram, YouTube, and TikTok are the audiences' most preferred social media platforms in Ethiopia.

3.2.2 Time Spent on Digital Media

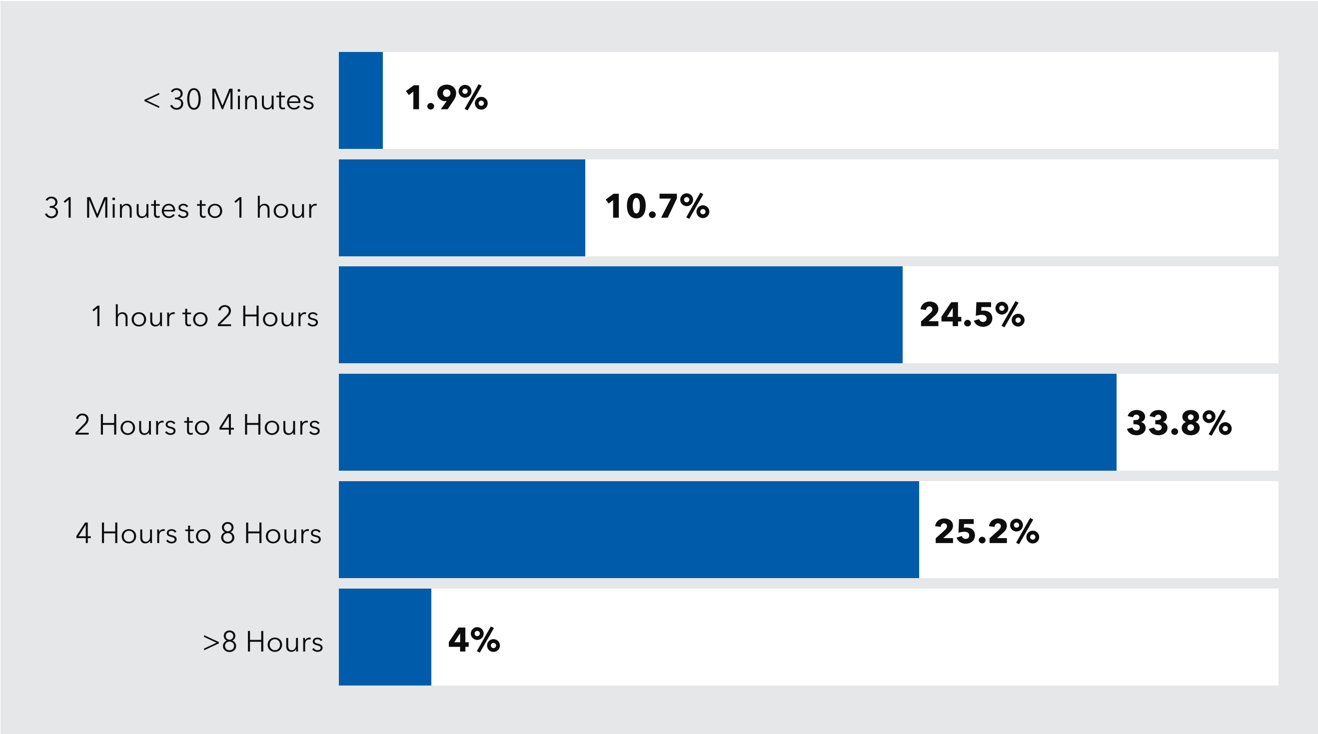
It is now apparent that people spend a lot of time using various digital or information and communication technologies. For instance, a research report from Global Web Index (GWI) revealed that a typical global internet user spent 7 hours per day using internet across all devices.[3] Furthermore, the GWI data also places South Africa, Philippines, Brazil, and Colombia at the top as countries with citizens spending the highest amount of time on the internet (i.e., more than 10 hours per day), while Japanese spend the least amount, with a national average of less than 4½ hours per day.

Regarding the issue of time spent in using digital media, the study found out that the majority of respondents (145/33.8%) spend between 2 and 4 hours a day in using digital media. Nonetheless, about a quarter of the respondents (25.2%) reported that they spend between 4 and 8 hours using digital media on the internet.

Only a small percentage of respondents (4%) use digital media for more than 8 hours, which is higher than the global average. Some differences emerge when cross-tabulating time spent on digital media with age. Those in the age group of 19 to 29 years spend the highest amount of time using digital media. In short, the survey data suggest that digital media users spend a relatively less amount of time, especially in comparison with the 7 hours global average.

3 https://datareportal.com/reports/digital-2022-time-spent-with-connected-tech

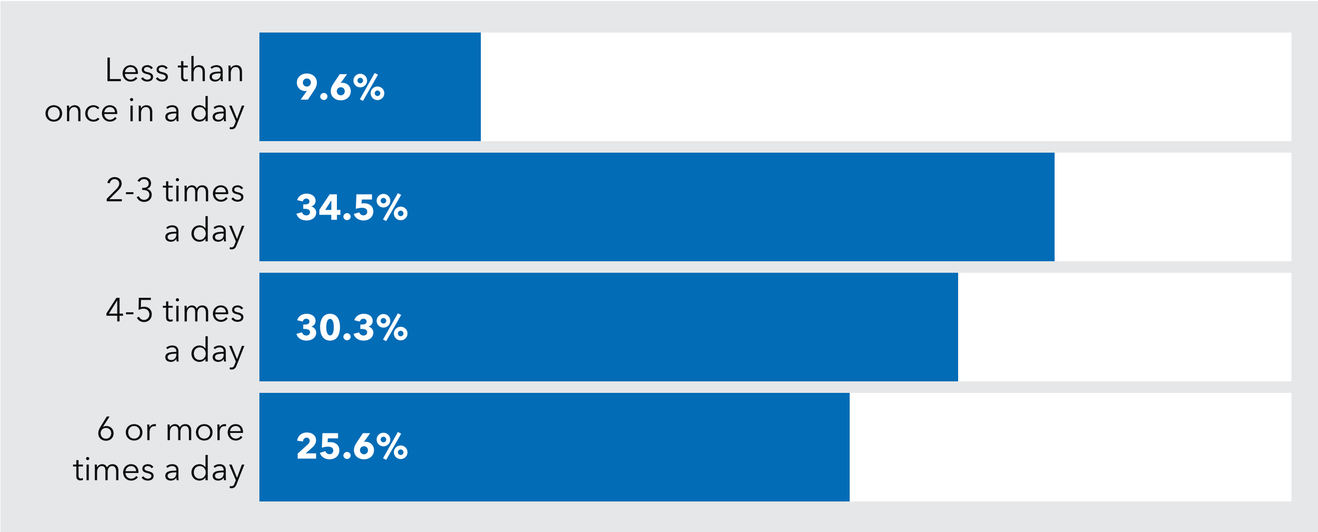
FIGURE 2 | TIME SPENT ON USING DIGITAL MEDIA



3.2.3 Frequency of Digital Media Usage

In addition to assessing the amount of time spent on the platforms, this survey also looked at the frequency of their digital media usage. In this regard, the study found out varied frequencies in the audiences' digital media usage. For instance, about a quarter of the respondents (25.6%) reported checking digital media outlets several times in a day (6 or more times, to be precise). About 30.3% of the respondents indicated that they used digital media for 4 to 5 times in a day. The largest number of respondents (34.5%) reported that they check their digital media twice or three times in a day. A small number of the respondents (9.6%) said they rarely visit digital media (less than once in a day). This generally shows that digital media users have a habit of frequently using digital media.

FIGURE 3 | **FREQUENCY OF DIGITAL MEDIA USAGE**



3.2.4 Motivations to Use Social Media

Previous studies which applied the Uses and Gratifications Theory (UGT) have documented a variety of motivations that lead people to using social media platforms. These include the use of social media for entertainment, identity formation, social enhancement, interpersonal connections, pastime, relaxation, and escapism, among others.[4] Regarding the issue of motivations to using social media, the study found out that entertainment, information seeking, maintaining interpersonal connectivity, and escapism were the primary considerations in the audiences' use of social media platforms. The largest number of respondents (96.7%, Mean = 4.69) say they use social media for entertainment. Information seeking appears to be the second largest driving factor for using social media among the respondents (94.9%, Mean = 4.66). Similarly, a significant portion of the participants use social media for social interaction, i.e., they use social media to stay in touch with current friends (92.6%). They also use social media to connect with family members (80.2%). A fair number of respondents say they use social media to read comments of prominent individuals (78.5%), to escape loneliness (75.5%), and to share and discuss their opinions with others (74.2%) whereas 63.40% of respondents say they use social media to make new friends. A small number of respondents use social media to look for romantic partners (37.5%, Mean = 2.77), which indicates that romance is not that

4 Baek, Holton, Harp, & Yaschur, 2011; Zolkepli & Kamarulzaman, 2015; Ifinedo, 2016; Whiting & Williams, 2013

important a reason for using social media among the respondents. Interestingly, however, the mean scores of male respondents (2.97) is higher than that of females (2.41). This difference was found to be statistically significant with a t-value of -3.931 and P = .000. This implies that men tend to use social media to find potential romantic partners more often than females. Nonetheless, the Standard Deviations are relatively high for all questions asked regarding the motivations for using social media, which demonstrates that there was little agreement among the respondents on the issue.

TABLE 2 | **RESPONDENTS' MOTIVATIONS TO USE SOCIAL MEDIA**

No.	Respondents' motivations to use social media	N	Mean	Std. Deviation	Percentage Saying 'Agree' and 'Strongly Agree'
1	I use digital media to entertain myself.	429	4.6946	.56988	96.7
2	I use digital media to get news and information.	429	4.6620	.62650	94.9
3	I use digital media to stay in touch with current friends.	429	4.4382	.78778	92.6
4	I use digital media to fill my spare time.	429	4.3124	.85945	86.0
5	I use digital media to read comments or posts by celebrities, politicians, or athletes.	429	4.1212	1.14150	78.5
6	I use digital media to stay in touch with family members.	429	4.0583	1.12485	80.2
7	I use digital media to avoid loneliness.	429	4.0466	1.20849	75.5
8	I use digital media to share and discuss opinions with others.	429	3.9044	1.07116	74.2
9	I use digital media to connect with other people who share my hobbies or interests.	429	3.8834	1.08750	74.6
10	I use digital media to make new friends.	429	3.5012	1.22212	63.4
11	I use digital media to find potential romantic partners or people I might like to date.	429	2.7762	1.42779	37.5

3.3 Audiences' Digital Media and Content Preferences

3.3.1 Audiences' Content Preferences on Digital Media

Digital media platforms provide audiences with a wide range of content choices. This survey attempted to map out the kind of media contents that are sought by digital media users in Ethiopia. The findings of the survey indicate that entertainment, politics, sports and religious issues are at the forefront of the audiences' primary digital content preferences. Looking closer to the survey data, about a quarter of the respondents (24%) go to digital media to gratify their needs for entertainment. Next to this, a majority of respondents (22.6%) use digital media to get updates on political issues. This is expected in a country where audiences experience frequent and significant political changes almost on a daily basis. 19.8% of the respondents say they use digital media to get sports-related information primarily. This is not surprising when one considers Ethiopia's rapidly increasing youth society with high interest in sport activities. Similarly, 16.6% of the respondents use digital media platforms to consume information about religious issues. These four major content types accounted for 83% the audiences' primary digital/online content preferences. The study also indicated that respondents have limited interest to a range of digital content types. For instance, only 0.2% of the respondents say they seek environmental issues on digital media outlets. In the same manner, foreign news captures the attention of only 0.7% of the respondents. Media contents on culture and travel (0.5%) and development issues (2.1%) are still grouped under the least preferred types of contents by the audiences (See Figure 4 for details).

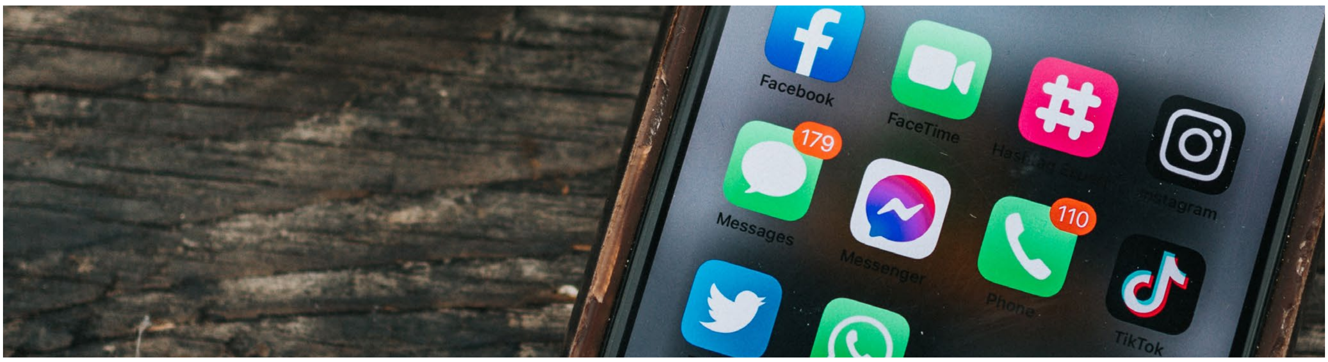
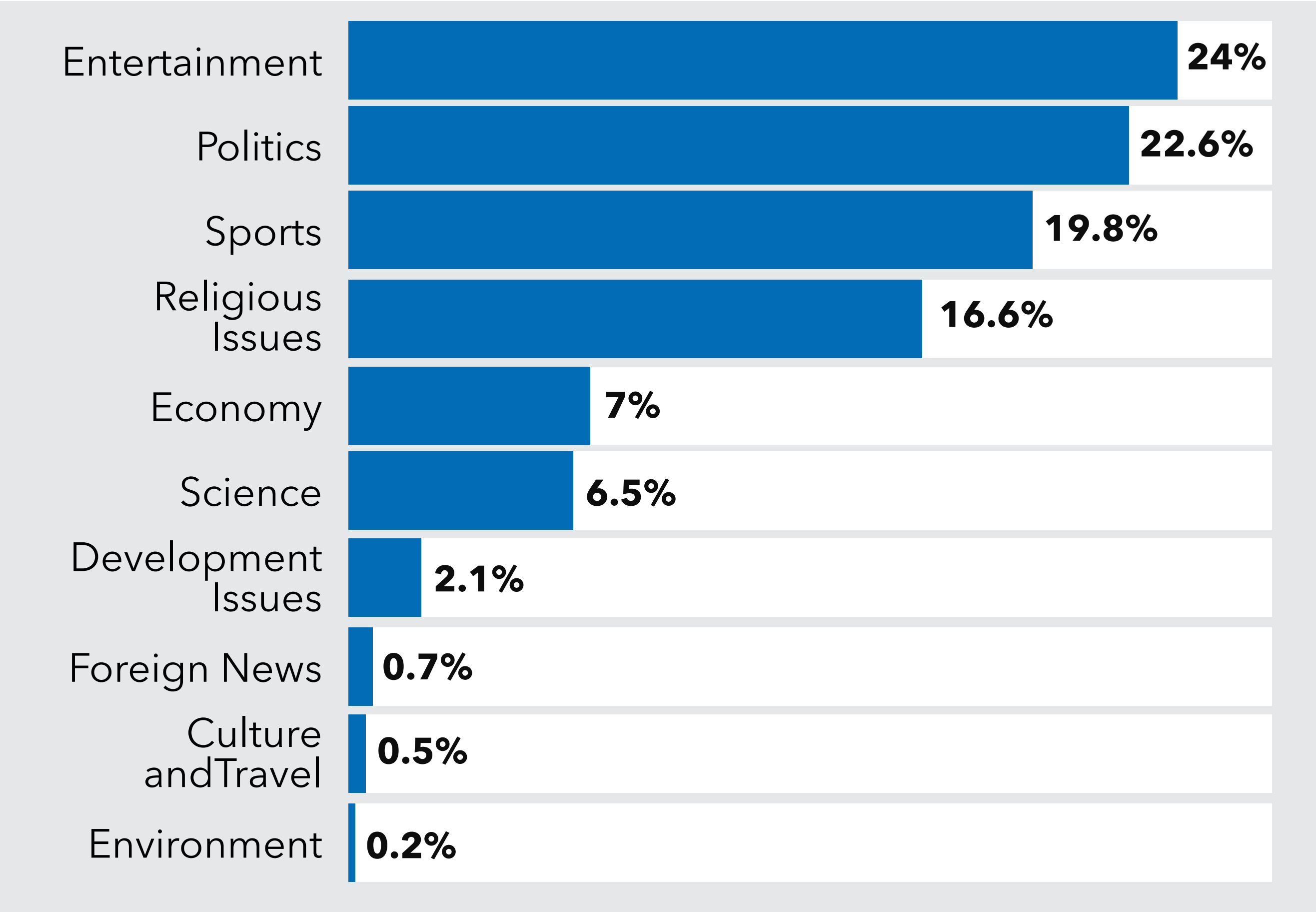


FIGURE 4 | **AUDIENCES PRIMARY CONTENT PREFERENCES**

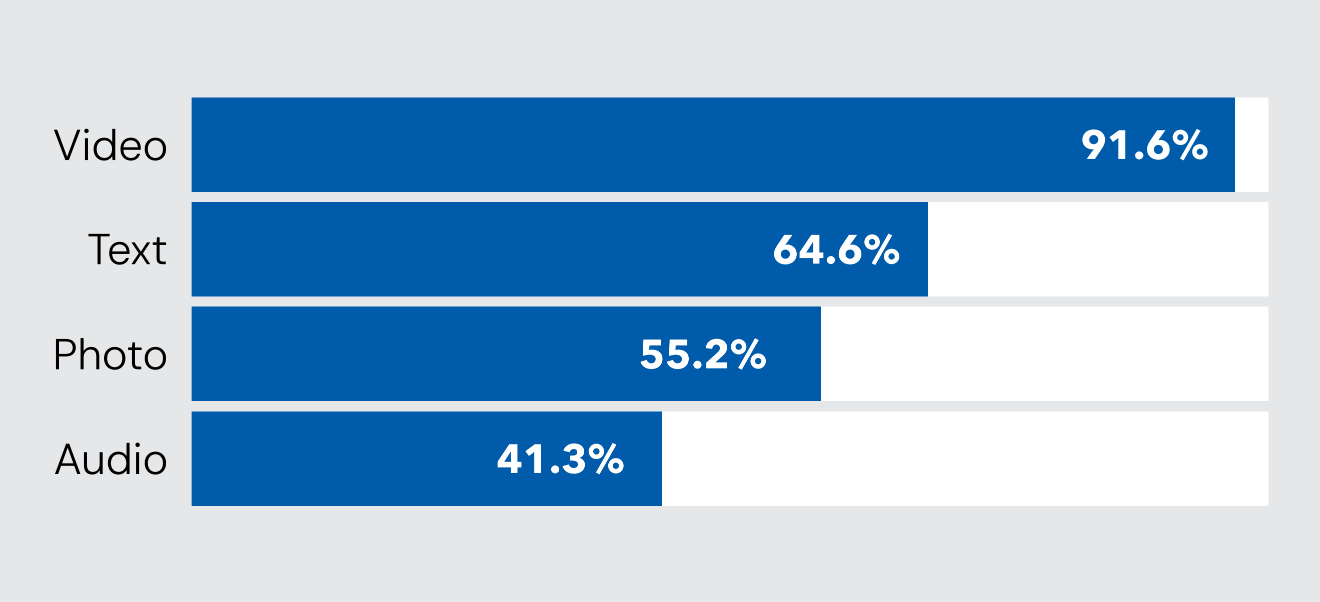


Notable differences do, however, emerge when cross-tabulating the audiences' content preferences with their gender. For instance, media contents such as religious issues (N = 45 (10.48%) versus N = 26 (6.06%)) and entertainment (N = 60 (13.98%) versus N = 43 (10.02%)) are more preferred by women than men. On the other hand, contents such as politics (N = 75 (17.48%) versus N = 22 (5.12%)), sports (N = 78 (18.18%) versus N = 7 (1.63%)), and science (N = 23 (5.36%) versus N = 5 (0.69%)) are mostly preferred by the majority of male respondents (See Appendix 7).

3.3.2 Audiences' Format Preferences

A key feature of digital media platforms is their easy accessibility and ability to provide media contents on a variety of formats. However, little is known about the kinds of formats that audiences prefer to consume their online news and information. The study found out that Ethiopian digital media users like to consume online news and information using a multitude of formats. The largest share of respondents (91.6%) chose videos as the most preferred format to consume online media contents. Text, on its part became the second most preferred format to consume online media content, chosen by 64.6% of the respondents. Pictures or illustrations were the third (55.2%) preferred formats. Only 41.3% of the respondents liked to consume online news and information, which demonstrates the declining place of podcasts among Ethiopian digital media users.

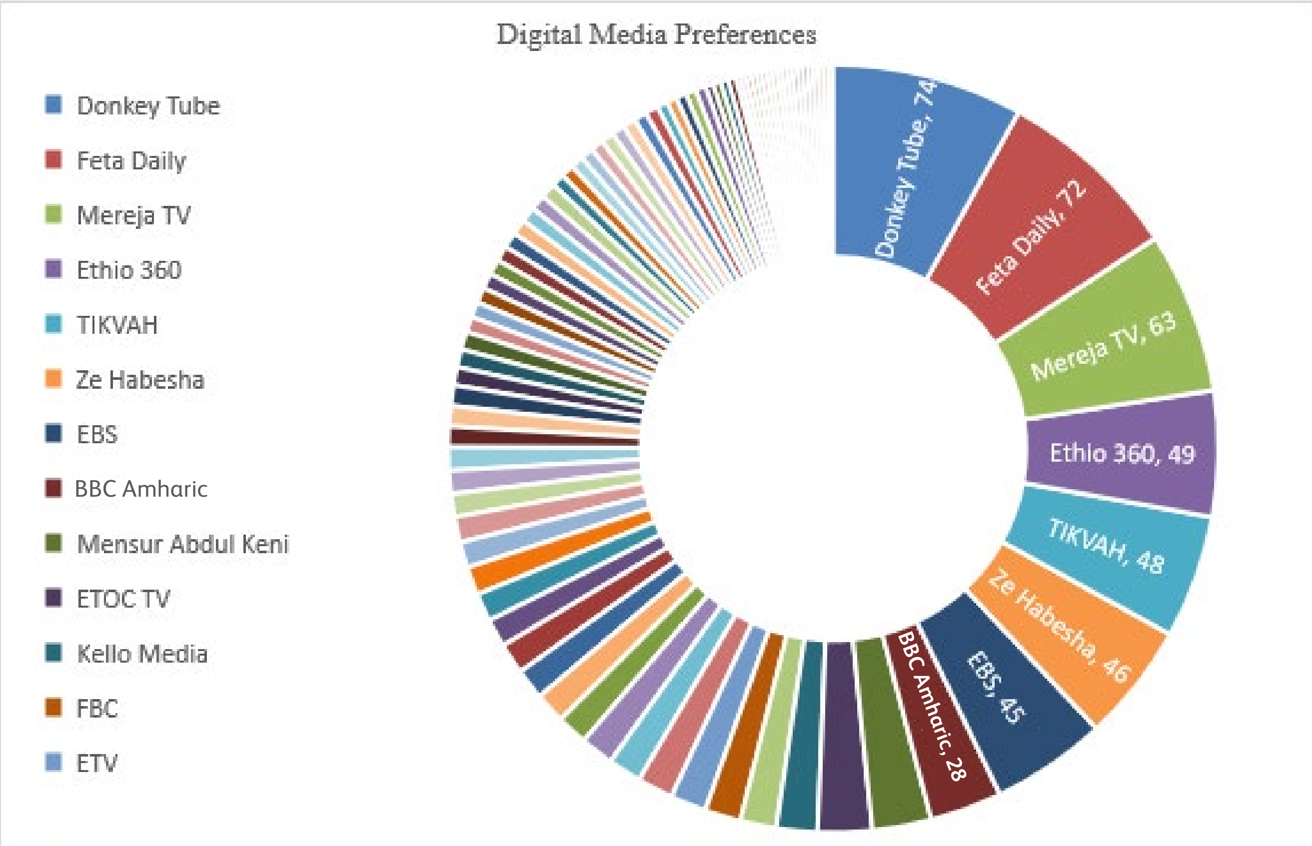
FIGURE 5 | **AUDIENCES' FORMAT PREFERENCES**



3.3.3 Audiences' Digital Media Preferences

The survey included a question about the audiences' most preferred digital media outlets in Ethiopia. In doing so, we aimed to identify their preferred digital media outlets which they mostly used. We deliberately gave the respondents the opportunity to list down the digital media outlet which they think was important to them. The study found out that YouTube-based digital media outlets were the most preferred outlets in Ethiopia. More specifically, the study identified Donkey Tube, Feta Daily, Mereja TV, Ethio 360, TIKVAH, Zehabesha, EBS, BBC Amharic, Mesnsur AbdulKeni, and EOTC TV to be the top 10 most preferred digital media platforms (See Figure 6).

FIGURE 6 | **AUDIENCES DIGITAL MEDIA PREFERENCES**



To scrutinize the issue in more detail, *Donkey Tube*, which has more than 1.9 Million YouTube subscribers, appeared on top of the list of the audiences' digital media preferences. This YouTube-based company was established in 2017 by a young comedian and has already amassed more than 352 million views on YouTube. Another YouTube-based news outlet, *Feta Daily*, became the second most preferred digital media outlet with 1.13 million subscribers. On a third level, we find *Ethio 360*, a political analysis YouTube channel established by former journalists of ESAT TV. *Ethio 360* had more than 500 thousand subscribers on YouTube until it lost control of the Channel (SpeakerJ Stats, May 2023). *Mereja TV*, yet another critical news site, became the fourth preferred digital media outlet. Likewise, TIKVAH, a telegram-based news channel with more than 1.2 million subscribers, was the fifth preferred digital media outlet. *Zehabesha*, was the audiences' sixth most preferred digital media. Just like the case of *Ethio 360*, *Zehabesha* had strong YouTube subscription base. However, it has now only 42 thousand YouTube subscribers after its previous YouTube channels with hundreds of thousands of subscribers were shut down by the platform. Media outlets such as EBS, BBC Amharic, Mensur AbdulKeni Official, and EOTC TV became the 7th, 8th, 9th and 10th most preferred digital media outlets. A closer look at the main focus of the chosen digital media outlets shows that the media outlets generally specialize on entertainment; news and political analysis; sports; and religious issues. These were indeed the most preferred contents sought by the audiences.

TABLE 3 | **MOST PREFERRED DIGITAL MEDIA OUTLETS AND THEIR AUDIENCE SIZE**

No.	Name of the Outlet	Main Focus of the Outlet	Number of Subscriptions on YouTube	Number of Views
1	Donkey Tube	Entertainment	1.91 M	352 M
2	Feta Daily	News and Political Analysis	1.13 M	323 M
3	Mereja TV	News and Political Analysis	N/A	
4	Ethio 360	News and Political Analysis	N/A	
5	TIKVAH	News	1.2M (On Telegram)	
6	Zehabesha	News and Political Analysis	42 K	10M
7	EBS	Generalist	1.99 M	1 B
8	BBC Amharic	Generalist	N/A	N/A
9	Mensur Abdul Keni Official	Sports	98.1K	9M
10	EOTC TV	Religious Issues	408K	28 M

3.3.4 Reasons behind Participants' Digital Media Preferences

This survey included a question about the respondents' main reasons behind the selection of their preferred digital media. To do so, we asked the respondents to state the main reasons why they prefer to consume a particular digital media. The findings of the study indicate that digital media users select the media outlets they consume based on a number of factors. For instance, a large proportion of the respondents (32.21%) consider the capacity of the media outlets in producing quality entertainment as a primary factor in their media preference. This goes in line with the fact that entertainment is the most preferred type of content by digital media users in this survey.

The potential of the media outlet to provide current/up to date information is the second most important factor that influenced the audiences' digital media preference. In this regard, 28.67% of the respondents reported that the digital media outlets they prefer were those which supplied them with fresh news and information. Next to this, 17.52% of the respondents mentioned the issue of trustworthiness of the media as another driving factor which influenced their digital media preference. This is related with the ability of the media outlet to provide reliable information. In the same manner, a number of respondents (10.79%) considered the educational value of the media outlets in their decision to choose a media outlet. In other words, audiences prefer to follow media outlets that help them gain new knowledge or learn something new. A few respondents (3.38%) indicated consuming digital media outlets that support or promote their religious worldview. Interestingly, the capacity of the media outlet to provide balanced or independent reporting is cited by a small number of respondents (2.30%) (See Table 4).

TABLE 4 | **REASONS WHY AUDIENCES PREFER THE DIGITAL MEDIA THEY CONSUME THE MOST**

Reasons	Frequencies	Percent
Trustworthy / Reliable Information	99	17.52
Balanced /Independent Reporting	13	2.30
Current/Up To Date Information	162	28.67
Quality Entertainment	182	32.21
Ease of Use/Accessibility	7	1.23
Provision of Educational/New Knowledge	61	10.79
Being Supportive of Own Religious Views	22	3.89
Good Approach	19	3.36
Total	565	100

3.4 Trust on Digital Media

The emergence of digital technologies has drastically increased the audiences' options for media consumption. It is not questionable today that people get more information from a multitude of traditional and digital media platforms. However, concerns are heard about the decline of trust in the media. In this case, the issue of trust in news encompasses a variety of factors including credibility in sources ranging from journalists to news outlets to news organizations.[5]

This study aims to investigate the extent to which audiences trust the news and information that they get from digital media platforms. With 83.9% of respondents saying that they have a 'fair' and 'great deal of trust', Telegram comes on top of the list of trusted media digital platforms in Ethiopia.

Next to this, 66.2% of the respondents reported that they have a 'fair' or 'great deal of trust' to news and information they get from websites, which makes them the second most trusted platforms. Likewise, YouTube becomes the third most trusted platform with 64.1% of the audiences indicating that they have a 'fair' or 'great deal of trust'. Even though Facebook is the most preferred social media platform in Ethiopia, it stood at 4th place when it comes to the issue of trust. Only 53.1% of the respondents stated they have a 'fair' and 'great deal of trust' to news and information that comes from Facebook. On the other hand, only small percentages of respondents say that they have fair or great deal of trust to LinkedIn (19.1%) and Twitter (23.8%) (See Table 4). It is important to remember the fact that the two platforms are not very much familiar with the Ethiopian digital society.

For instance, Twitter has less than 100,000 users as a whole in Ethiopia. Therefore, the decline in the level of trust may not necessarily mean that news and information from the two sites is untrusted. As indicated in the above table, the questions about trust on social media had high Standard Deviations, which demonstrates that the audiences are divided when it comes to their view of trust on news and information from digital media outlets.

5 Karlsen & Aalberg, 2023

TABLE 5 | **TRUST ON INDIVIDUAL DIGITAL MEDIA PLATFORMS**

	No.	Mean	Std. Deviation	Percentage saying 'A Fair' and 'A great Deal of Trust'
Telegram	429	4.27	.82	83.9
Websites	429	4.03	1.01	66.2
YouTube	429	3.50	1.00	64.1
Facebook	429	3.14	1.12	53.1
TikTok	429	3.35	.993	52.5
IMO	429	3.54	.940	42.2
Instagram	429	3.57	.860	39.6
Twitter	429	3.37	.770	23.8
LinkedIn	429	3.33	.735	19.1

To assess the issue of trust on media outlets as a whole, we asked respondents to indicate what kinds of media platforms they trust the most. We provided them with three main options: legacy media outlets, fully digital media outlets, and influencers or personal pages. The findings of the study showed that the audiences had a higher amount of trust to fully digital media outlets (50.1%). Next to this, 34.7% of the respondents say they trust traditional or legacy media outlets more. Furthermore, the study also showed that influencers or personal pages were the least trusted platforms in Ethiopia (15.2%) (See Table 5).

Qualitative data from FGDs paint a slightly different picture when it comes to trust on digital media outlets. A majority of respondents believe that legacy media outlets are better trusted than fully digital ones. For instance, a participant from Addis Ababa explains this as follows:

> *I prefer legacy media when it comes to trust. The mainstream media presents information including voices from both sides on a certain issue. The mainstream media has experience and it has professionals. So, at least it does not tell a fabricated story. The content is checked by at least 2 or 3 professionals before it gets aired* **(FGD participant)**.

Although the survey indicated a limited amount of trust on influencers or personal pages, data from FGDs show some interesting reasons why personal pages can be useful sources of information. An FGD participant argues:

> *Personal influencers/bloggers are trusted*

sources of information. The media do not often tell the reality. The local media have been facing challenges especially from the government, and hence, their stories do not show the realities. The private media lack the courage to produce political content and instead incline to dwell on entertainment aspects. Therefore, I get information from selected personal pages or influencers like Getu Temesgen **(FGD participant)**.

TABLE 6 | **OVERALL TRUST ON DIGITAL MEDIA**

In your consumption of digital media, which types of media do you trust the most?	Frequency	Percent
Legacy Media Outlets	149	34.7
Fully Digital Media Outlets	215	50.1
Influencers or Personal Pages	65	15.2
Total	429	100.0

3.5 Assessing Information Disorder

Social media can be seen as a 'double-edged sword' for modern communications because it offers a convenient channel for exchanging ideas or it can be a means of circulating fake news.[6] The term 'fake news' broadly blends three notions: misinformation, disinformation, and malinformation, which all make up what UNESCO (2018) calls the spectrum of *information disorder*.

3.5.1 State of Online Dis/ Misinformation

This study intended to assess the state of information disorder in Ethiopia. The findings of the study indicate that 96.3% of the respondents have experienced dis/misinformation in online platforms (Table 6). In other words, the respondents reported that they have experienced an online content which is either false, misleading, fabricated or manipulated. This indicates that digital media users are exposed to a rampant amount of fake news in their daily consumption of digital contents.

6 Dann, S (2015), Benchmarking Microblog Performance: Twitter Content Classification Framework in Burkhalter, Janée N. and Natalie T. Wood (Eds.). Maximizing Commerce and Marketing Strategies through Micro‐Blogging. Hershey, PA: IGI Global

TABLE 7 | **PERCENTAGE OF ONLINE MIS/DISINFORMATION**

As a digital media consumer, have you ever come across an online misinformation content such as a false, misleading, fabricated or manipulated content?	Frequency	Percent
Yes	413	96.3
No	16	3.7
Total	429	100.0

Qualitative data from FGDs support the established fact about the rampant online mis/dis/malinformation in Ethiopia's digital media eco system. A FGD discussant from Gondar city shares his experiences as follows:

> *...In fact, my previous use of digital media was problematic. I was not that much critical of the information I consume from online media. I tend to trust everything I got on the web. Due to that I have been a victim of several online misinformation. Now I learned my lesson, although in bitter ways (FGD Participant).*

Another discussant from Addis Ababa shares a similar experience of getting fake information from social media. The discussant says:

> *This past month, there was a disarmament mobilization around Gondar where my parents live. I read that the locals and the military were in active confrontation including battle like fights. I was worried and reached out to my parents. They told me that there was no fighting between the defense forces and the locals despite the presence of the defense forces at the area. The information I got from the digital platforms was somehow exaggerated that did not fully capture the reality on the ground. I also checked other friends and got more or less the same information about what was happening there (FGD Participant).*

3.5.2 Techniques the Audiences Use to Identify Dis/Misinformation

There is a growing interest among technologists and policy makers towards enhancing citizen's ability to evaluate the credibility of the information they get from media outlets. Regarding this, respondents were asked to indicate the techniques that they use to identify dis/misinformation while using digital media. The majority (87.4%) of the respondents say they 'agree' or 'strongly agree' towards using the technique of checking the source of when they have doubts on the credibility of the information.

In the same manner, 80.7% of them 'agree' or 'strongly agree' towards further checking other sources to verify the information. While 78.4% reported that they would check the author of information, 71.1% of them reported they would check the authenticity of the images in the story. As it is seen in Table 7, the usage of verification techniques is significantly higher than expected. However, it should be noted that the question simply documented the perceived responses of individuals and the actual capacity of identifying fake news might be different from this.

TABLE 8 | **TECHNIQUES THE AUDIENCES USE TO IDENTIFY DIS/MISINFORMATION**

	Frequency	Mean	St. Deviation	Percentage saying 'Agree' and 'Strongly Agree'
Check the source	375	4.34	.82	87.4
Check other sources	347	4.23	.92	80.9
Check the author	336	4.15	1.02	78.4
Maintain a critical mindset	329	4.06	.99	76.7
Check images are authentic	305	3.95	1.09	71.1

The qualitative data from FGDs give more elaboration on the audiences' techniques of verifying information. The respondents use a range of techniques including those indicated in the above table. For instance, a discussant from Gondar city shares his experience as follows:

> *I use different techniques to cross-check the information - especially those I feel are suspicious. Sometimes, I call my friends living in the area of the incident and ask them if they have heard the issue reported on social media. Other times, I check if other people in social media have reported it or not. At times, I ask myself if the issue could be real (FGD participant).*

3.5.3 Media Literacy Education Online

It has been indicated in the earlier parts of this report that digital media users are exposed to a great deal of online mis/disinformation. This indicates the importance of investing on media literacy education to enable audiences to become critical consumers of media.[7] Regarding the issue of online media literacy education, the

7 https://www.medialit.org/reading-room/10-benefits-media-literacy-education

study indicated that digital media users in Ethiopia rarely get contents that help them learn about media literacy. For instance, more than half of the respondents (56.2%) reported that digital platforms never gave them a chance to learn about using digital media critically. Overall, the findings of the study indicate that Ethiopian digital media users have few opportunities to enhance their media literacy skills in online platforms (See Table 8).

TABLE 9 | **TABLE 8: MEDIA LITERACY EDUCATION ONLINE**

As a digital media consumer, have you ever come across a content that helped you to learn about how to use digital media?	Frequency	Percent	Amhara	Oromia	Addis Ababa
Yes	188	43.8	94 (21.91%)	25 (5.82%)	69 (16.08%)
No	241	56.2	44 (10.25%)	119 (27.73%)	78 (18.18%)
Total	429	100.0	138 (32.16)	144 (33.56%)	(34.26%)

3.6 Internet Usage Patterns

3.6.1 Wi-Fi Accessibility

For decades, Ethiopian users have paid exorbitant amounts of money to the state monopoly, Ethio Telecom. Recently, however, the company has made repeated reductions on its telecom Tariffs. For instance, in 2018 alone, the company reduced its tariff for internet use by 43%, voice call, 40%, and SMS, 54%. Again, in February 2020, Ethio Telecom implemented up to 69% tariff reduction on Fixed Broadband internet (FBB) and other services. Nonetheless, the number of FBB subscribers is still low in the country (566.2 thousand at a national level). This survey found out that only 38.9% of the respondents own a Wi-Fi internet access in their homes. More than half (61.1%) said that they do not have Wi-Fi accessibility in their homes.

TABLE 10 | TABLE 10: OWNERSHIP OF WIFI AT HOME

Do you have your own WiFi at home?	Frequency	Percent	Amhara	Oromia	Addis Ababa
Yes	167	38.9	47 (10.95%)	37 (8.62%)	83 (19.34%)
No	262	61.1	91(21.21%)	107 (24.94%)	64 (14.91%)
Total	429	100.0	138 (32.16%)	144 (33.56%)	147 (34.26%)

Some differences did emerge when WiFi accessibility was cross-tabulated with the region of the respondents. Briefly, Addis Ababa (19.34%) leads the two regions in the number of respondents with WiFi access at home. 10.95% of the respondents in the Amhara Region say that they have WiFi internet at home, which puts the region in second place. With 8.62%, the Oromia Region has the least proportion of people that have WiFi accessibility (Table 10).

3.6.2 Money Spent on the Internet

It has been indicated above that Ethiopian users have for decades paid exorbitant amounst of money to telecom services, especially under the state monopoly of Ethio Telecom. In the recent past, the national telecom company has introduced significant tariff reductions on its services. This practice of reducing tariffs started in the wake of the 2018 reform[8], and additional reductions were made in 2020.[9]

This survey also intended to examine audiences' spending for the internet. In this regard, 37.1% of the respondents say they spend up to 500 Birr ($9) in a month for internet service. This amount is almost equal to Ethio Telecom's monthly fee for 1 Mbps Fixed Broadband internet service. Likewise, 38.7% of the respondents reported spending between 501 and 700 Birr. Only a handful of them indicated spending more than 1,000 Birr ($18) for internet service. The data generally shows that the majority of respondents spend less than 700 Birr for internet service in a month.

Qualitative data from FGDs shed more light on the issue of telecom prices. In comparison with previous years, the majority of respondents agree that the prices for telecom services have recently been reduced. However, many of them still feel that they are getting telecom service for high prices.

An informant explains this by taking the experience of India as an example:

8 https://www.ezega.com/News/NewsDetails/6533/Ethio-Telecom-Announces-Major-Reduction-on-Internet-Voice-Call-SMS-Rates
9 https://www.thereporterethiopia.com/9352/

In the early times of mobile phones, everything was quite expensive. For instance, calling from the Amhara Region to Addis Ababa almost sounded like calling someone from a foreign country. The cost has slowly gone down over a period of years. However, I still think it is expensive. For instance, I have lived in India for 3 years and the amount of money that I paid there is twice cheaper than the amount that I am paying here for Ethio Telecom (FGD participant).

TABLE 11 | **TABLE 11: MONEY SPENT ON THE INTERNET IN A MONTH**

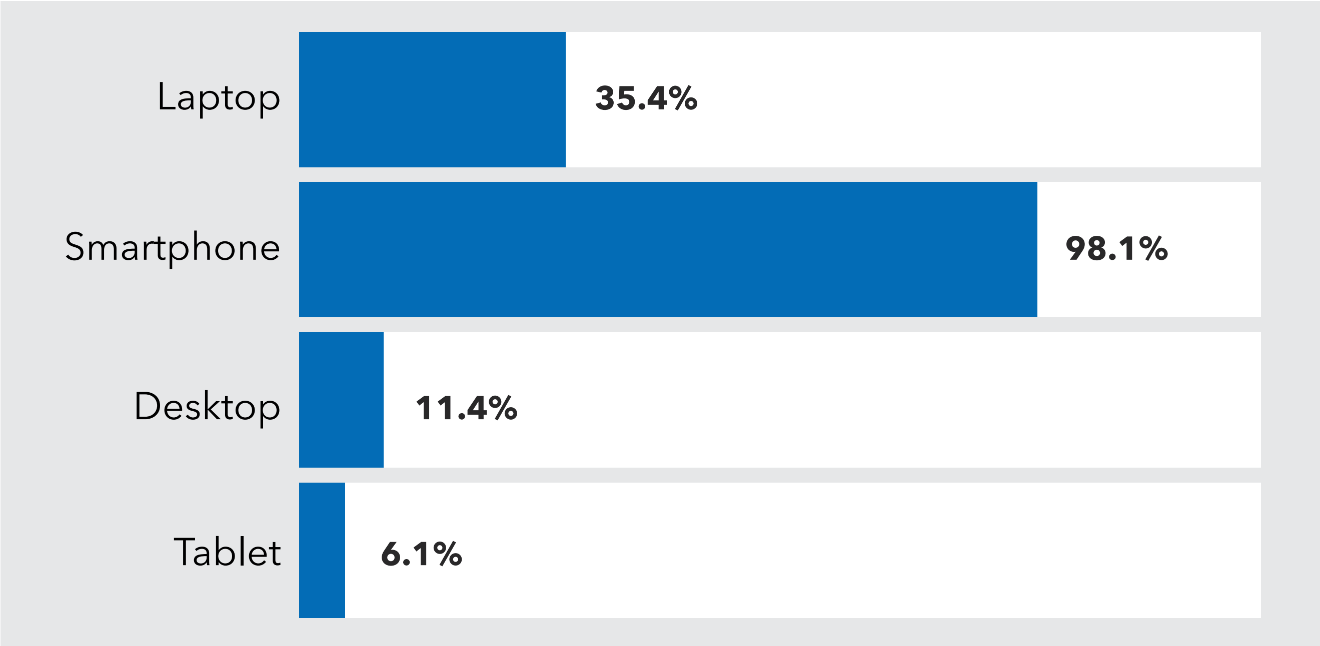
How much money do you spend on the internet (WIFI + Mobile Data) in a month?	Frequency	Percent
Less than 500	159	37.1
501-700	166	38.7
701-1000	76	17.7
More than 1000	28	6.5
Total	429	100.0

3.6.3 Preferred Devices Used to Access the Internet

People across the world use various types of devices to access the internet. On a global level, mobile phones, smart phones, and computers (laptop/ desktop) are the three most preferred devices that people use to access the internet.[10]Global surveys have also identified that tablet devices and feature phones (button phones) are the least preferred devices. The findings of this study reveal that surveyed respondents access the internet using a variety of devices. Among them, smart phones stand out as the most preferred devices for the majority (98.1%) of respondents to use the internet. Laptops and desktop computers were the second and third preferred devices to use the internet for 35.4% and 11.2% of the respondents, respectively. With 6.1% of the respondents choosing them, tablets appear to be the least preferred devices to access the internet in Ethiopia.

10 DataReportal, 2023

FIGURE 7 | **DEVICES USED TO ACCESS THE INTERNET**



Part II. Content Creators

4 Digital Content Creators' Assessment

The second part of the study examines digital content creators in Ethiopia, categorizing them into three distinct groups: legacy media digital outlets, internet-native outlets, and influencers. The assessment involved in-depth interviews with 18 content creators, supplemented by focus group discussions with an additional nine participants.

The in-depth interviews encompassed eight internet-native media outlets, six legacy media digital outlets, two legacy media outlets that have fully transitioned to the digital space, and two TikTok influencers. The discussions centered on platform presence, audience profile, content production, as well as institutional and business models of the digital media outlets. This aimed to provide insights into the overall digital media landscape in Ethiopia.

4.1 Platform Presence

Digital content creators interviewed for this study largely acknowledge that Ethiopia's media landscape, characterized by political tension, conflict, and civil war, significantly contributes to the formation of new and predominantly short-lived digital news outlets. Notably, former mainstream journalists, who were previously imprisoned at different times, have established platforms such as Ethio News and Alpha Media on YouTube within the past two years, demonstrating their perception of the digital space as an alternative avenue. This trend aligns with the history of early digital media institutions in Ethiopia, which were primarily diaspora-based and served as alternative sources of information, often expressing dissenting views in contrast to mainstream sources. This was a sentiment shared by on FGD participant:

> *Most actors engage in digital media platforms to seek alternative avenues for discussing pressing issues that often receive inadequate attention or are altogether disregarded by mainstream media outlets. Digital media plays a crucial role in highlighting and addressing*

these overlooked issues, thus amplifying their significance (FGD Participant).

Digital influencers have emerged as significant participants in Ethiopia's digital media landscape, further diversifying the field. These influencers are driven by various factors, including the pursuit of economic gains, fame, and the promotion of social causes such as justice and human rights. Platforms like Addis Power House, which operates through its website, Instagram, and Facebook, as well as Setaset Power on TikTok, exemplify channels that actively advocate for a specific cause, in this case gender equality. These influencers utilize their online presence to raise awareness and engage audiences in important societal issues, leveraging the power of digital media for positive change. As one focused group discussion participant puts it:

Interestingly, there exist a select few political activists on platforms like Facebook and Twitter who possess a substantial following and enjoy greater access to government information compared to both traditional mainstream media and digital outlets (FGD Participant).

BBC World's Horn of Africa, Amharic, Afaan Oromo, and Tigrigna services based in Kenya, along with the Abu Dhabi-based Al Ain, represent a distinct group of digital outlets that entered the Ethiopian digital media industry six and five years ago, respectively. These outlets emerged during a period of significant political reform in Ethiopia and have since become prominent players in the country's media landscape. While BBC Amharic initially aimed to establish a mainstream media presence through syndication, its efforts were disrupted when the partnership with Ahadu Radio, the hosting platform, was terminated at the onset of the Tigray War (2020-2022). Conversely, Al Ain, which initially invested heavily in human and physical resources, is now undergoing operational downsizing in Ethiopia, with a focus on enhancing efficiency.

When examining the broader media landscape in Ethiopia, it becomes evident that legacy mainstream outlets and journalists are undergoing a definitive shift towards digital platforms, influenced by both the political environment and prevailing media economics. The pioneering efforts of Addis Neger and Awramba Times newspapers in 2009 and 2012, respectively, set the stage for other legacy mainstream media outlets such as Addis Standard Magazine, Addis Zeybe newspaper, and Addis Maleda newspaper (which went online just a few months ago) to successfully transition to digital formats. Additionally, the ability of online-based Wazema Radio and ESAT, a satellite TV channel with a substantial pre-reform following, to register and operate within Ethiopia following the political reform under Prime Minister Abiy Ahmed (Ph.D.), represents a noteworthy development in the Ethiopian digital media narrative. This shift highlights the ongoing transformation within the country's media ecosystem.

While many digital-native outlets in Ethiopia are still in their early stages of development and operate with limited resources and manpower, significant progress has been made in terms of institutionalization and the production of original content. However, there are also digital outlets that heavily rely on content aggregation, raising concerns regarding copyright protection for digital products within the country. This sentiment was succinctly articulated by one FGD participant as:

> *In response to the imperative to consistently generate content that engages audiences, digital platforms frequently resort to copied material from international sources, often neglecting to provide pertinent local context (FGD Participant).*

In Ethiopia, digital media outlets employ a variety of platforms, including Facebook, YouTube, Instagram, TikTok, Telegram, Twitter, and websites to engage with their audiences. The number of followers and subscribers varies greatly, ranging from millions to thousands, indicating substantial differences in audience size and reach across the sector. The daily viewership numbers highlight the level of engagement and impact of their content, with certain outlets reaching hundreds of thousands of viewers on a daily basis. Furthermore, trends such as website traffic, targeted outreach in specific languages, and the dominance of platforms like Facebook and YouTube are commonly observed within the sector.

4.1.1 Platform Diversity

The examination of content creators in Ethiopia reveals varying levels of diversification in their platform presence and audience reach. It is evident that several outlets effectively engage with their followers through multiple channels, demonstrating a high degree of platform diversification. For instance, Wazema Radio and Addis Zeybe maintain an active presence on Facebook, Twitter, YouTube, their website, and Telegram, enabling them to connect with their audience through a diverse range of digital avenues.

While platform diversification is common among content creators, Tikvah stands out from the group not only due to platform diversity but also its expansion of reach within a single platform – Telegram. Tikvah achieves this by operating different channels such as Tikvah Ethiopia, Tikvah Magazine, Tikvah Sport, Tikvah University, and Tikvah Afaan Oromo, catering to specific niches and language preferences.

On the other hand, some outlets have a more limited range of platforms. For example, Addis Standard primarily focuses on Twitter and their website, while others prioritize specific platforms such as Twitter, Instagram, Telegram, and Facebook, or rely solely on websites as their primary digital platform. It is worth noting that digital influencers like Nati XIA and Jordin Bezabih primarily concentrate on TikTok as their main channel for content distribution.

This examination highlights the diverse approaches taken by content creators in Ethiopia regarding platform presence and audience engagement. While some prioritize extensive diversification across multiple channels, others concentrate on specific platforms or even a single platform with niche-specific channels. Understanding these variations can provide insights into the strategies employed by content creators to connect with their target audience.

4.1.2 Reach

Upon analyzing the audience reach and popularity of different digital media outlets in Ethiopia, it becomes apparent that the sector is on a steady rise to prominence within the country's media ecosystem. In fact, several media entities interviewed for this study have emerged as some of the most widely recognized and highly followed outlets in Ethiopia, amassing millions of followers and hundreds of thousands of subscribers.

Ethiopia's digital media landscape boasts a variety of platforms and outlets. The state broadcaster, EBC, stands out with 13 Facebook pages and three YouTube channels, making it one of the country's most well-equipped and diverse digital media operations. Additionally, Fana Broadcasting Corporation, once affiliated with the ruling party/state, maintains a strong presence on platforms like Facebook and YouTube. Other prominent digital media platforms in Ethiopia include Arts TV, an independent broadcaster focusing on infotainment, Tikvah Ethiopia, a popular Telegram platform, and Dire Tube, a leading outlet catering to Ethiopian film audiences.

Analyzing the sample, we find that the top five digital media outlets reveal an intriguing picture of digital media evolution in Ethiopia. Surprisingly, the top three outlets among a predominantly-digital-native sample of outlets are legacy media digital platforms. Four out of the top five outlets are video-oriented, while TIKVAH is primarily text-based and ranks fourth in popularity. This finding aligns with the audience survey indicating Ethiopian digital audiences' preference for video content.

Certain media outlets exhibit significantly higher reach and larger subscriber or follower numbers compared to others. EBC, the state broadcaster, leads the sector with 3.6 million Facebook followers, 1.2 million YouTube subscribers, and 435,000 Twitter followers. It also maintains a presence on Instagram, Telegram, and TikTok, with considerable followings on each platform. Fana Broadcasting Corporation, another notable platform, boasts 3.4 million followers on their Amharic Facebook page, 900,000 followers on their Afaan Oromo Facebook page, and 625,000 followers on Twitter. Their YouTube channel further expands their reach with 1.2 million subscribers.

Dire Tube also enjoys significant audience support, with 3.2 million Facebook followers and 500,000 YouTube subscribers. Arts TV, a recently established local television station, has 1.2 million YouTube subscribers. Fast Mereja and Wazema Radio also demonstrate respectable reach, with 773,791 and 400,000 Facebook followers, respectively. Addis Standard primarily focuses on Twitter, with a commendable following of 400,000.

Among the major digital platforms in Ethiopia, Tikvah Ethiopia stands out as a Telegram Channel, with 1.2 million subscribers and a daily average viewership of over 200,000. TIKVAH Magazine, TIKVAH Sport, and TIKVAH Universities are popular channels with 200,000; 160,000; and 150,000 subscribers, respectively. New Business Ethiopia leads in website traffic, with 500,000 to 700,000 monthly visitors, a significant following for any website outlet in the sector.

On the other hand, some media outlets have a relatively lower reach and fewer subscribers or followers. New Business Ethiopia, despite attracting high traffic to its website, has modest numbers on Twitter and YouTube. The Reporter, despite having a presence on YouTube, Twitter, Facebook, and Telegram, has a relatively lower subscriber count of 13,000 on YouTube. Addis Zeybe, present on various platforms including the website, Facebook, YouTube, Telegram, LinkedIn, and Twitter, garners moderate numbers of followers on each.

Facebook and YouTube emerge as dominant platforms for digital media content consumption in Ethiopia, with millions of followers and subscribers each. Twitter, Instagram, Telegram, and TikTok also play significant roles in reaching digital media audiences in Ethiopia. Facebook serves as the primary content consumption platform, with many outlets having larger audience numbers there, compared to other platforms. Media outlets like Fast Mereja, Fana Broadcasting Corporation, EBC, and Dire Tube effectively leverage Facebook to share news articles, videos, and engage with followers through comments and discussions.

YouTube is a popular platform for video content, and outlets like Alpha Media, Fana

Broadcasting Corp., Dire Tube, and Arts TV heavily rely on it as their primary outlet for disseminating video content to a wider audience. While not as widely used, TikTok serves as the primary content outlet for digital influencers like Nati XIA (220,000 subscribers) and Jordin Bezabih (41,000 followers). These outlets utilize TikTok's short-form video format to reach and engage with their audience.

It is important to note that the primary content consumption channels, as measured by platform analytics and data, may not necessarily align with creators' strategic content release platforms. While Facebook and YouTube are preferred platforms for accessing digital content in Ethiopia, some outlets prioritize their websites as the primary distribution channels. Several media outlets, including Wazema Radio, Addis Zeybe, New Business Ethiopia, and The Reporter, utilize their websites as the primary platforms for publishing and sharing content.

This discrepancy can be attributed to various factors, including websites enjoying an advantage as earlier digital platforms and an initial underestimation of the power of social media. However, some outlets have gradually shifted from websites to social media as their primary content platforms, driven by data and analytics, leading to platform-specific curation and content production. Although websites provide a comprehensive and customizable space to showcase articles, videos, and other media content, the popularization of social media has eventually diminished their role as primary content platforms in Ethiopia.

Website traffic varies among outlets, ranging from a few thousand to hundreds of thousands of monthly visitors, highlighting differences in popularity and accessibility. Even state-affiliated and well-resourced outlets have often mismanaged and neglected their web pages, rendering them almost irrelevant for nearly a decade. However, there has been a resurgence of websites as social media started to slow down in recent years, according to one respondent:

> *Websites were significant as content outlets for media during the early stages of digital media development but took a backseat with the expansion of social media. However, as social media started to slow down in the past few years, we have seen the resurgence of websites (KII Participant).*

4.2 Audience Profile

4.2.1 Audience Demography

The digital media sector in Ethiopia is characterized by its diverse audience demographics, interests, and platform preferences. It caters to a wide range of age groups and societal segments. By conducting in-depth interviews with sampled content creators, we gained valuable insights into the Ethiopian digital media audience, revealing a rich tapestry of age ranges, gender representation, geographic reach, language preferences, and social media platform choices. These demographic indicators shed light on the multifaceted nature of the audience in Ethiopia's digital media landscape.

Age

The digital media audience in Ethiopia primarily consists of younger individuals, with a strong focus on youth and young adults. Across different platforms, the audience of sampled content outlets typically falls within the age range of 18-34 years old. However, there are also platforms that cater to audiences aged 25-49. This shift in media consumption patterns indicates that a significant portion of the population, especially the youth, engages with digital platforms for news, entertainment, and social interactions. Unlike older generations, who rely on traditional media sources, the youth in Ethiopia are more likely to consume news and other forms of media through digital channels such as social media platforms, online news websites, streaming services, and mobile applications. This shift signifies a changing landscape where digital media platforms have become central to how younger individuals access and engage with information and entertainment.

The age range of 18-49 is generally considered a key demographic characteristic in media and advertising. As digital media outlets increasingly focus on youth and young-adult audiences, it has a profound effect on content production. These outlets prioritize audience demographics, needs, and preferences in the production and curation of content.

Almost all the native media outlets identified their audience as youth (16-24) or young adults (18-34). However, Alpha Media, a YouTube-based platform, caters to a more mature audience, with three quarters of its audience falling within the age range of 34-73 years old.

The study also indicates that legacy

platforms integrating into the digital space tend to have audiences in the young adult or middle-aged adult age groups. However, when considering more recent social media platforms like TikTok and Instagram, the demographic composition of the audience skews towards younger age groups. These platforms have witnessed the emergence of influencers, who have gained significant prominence and a considerable following.

TikTok, with its short-video format, has experienced remarkable growth and popularity in the Ethiopian digital media landscape. It appeals to a predominantly young audience and has given rise to a new generation of digital media influencers known as TikTokers. These influencers are notably young and provide a glimpse into the future of content creation in the digital space. In our study, the two TikTok influencers, for instance, primarily target individuals aged 16-24 and 18-33.

These trends have significant implications for widely used digital media platforms in Ethiopia, particularly regarding age groups and other demographic characteristics. For example, TikTok attracts a younger audience profile, while platforms like Facebook and YouTube gradually mature and primarily attract young adult and adult audiences in Ethiopia. One content creator puts it as follows:

> *...indicative of how fast the media technology is moving, now YouTube is considered old media, with the rise of TikTok, and it is attempting to promote its new feature YouTube Shorts to compete (KII Participant).*

Gender

The digital media landscape in Ethiopia demonstrates a pronounced gender imbalance, with a disproportionate focus on male audiences. Upon analyzing the audience profiles of the outlets included in this study, it becomes evident that the majority of these platforms cater to male audiences, ranging from 70% to 80% across various digital platforms. Except for a lone TikTok influencer who champions gender equality and has a 60% female audience, all the content creators interviewed acknowledged a significant gender gap in their audience composition. This skewed representation of male users and the potential gender disparity in digital media engagement could be influenced by several factors, including limited technological access, cultural norms, and content preferences.

Access to digital devices and internet service is limited for certain individuals, which can contribute to the gender gap. Additionally, prevailing cultural expectations and gender roles play a role in shaping the audience demographics. Furthermore, differences in content preferences might also contribute to this gender imbalance. One respondent thinks:

> *Addressing the gender gap requires efforts to improve technology access, promote digital literacy, and foster inclusive and safe online spaces (KII Participant).*

Despite the growing emphasis on engaging diverse audiences and targeting specific interests, the audience profile of most digital media outlets in Ethiopia continues to be predominantly male.

Language and Geography

Contrary to popular perception, digital media platforms in Ethiopia primarily cater to the local audience, with a significant diaspora community forming an online presence. In-depth interviews with content creators indicate a relatively balanced distribution of Ethiopian digital content between local and diaspora audiences. The diaspora audience, concentrated mainly in the Middle East, the United States, Europe (such as Germany), and other countries, plays a crucial role in Ethiopian digital content consumption.

Previously, due to connectivity infrastructure and media literacy levels, digital media in Ethiopia was mainly consumed by the active diaspora community. However, despite the importance of the diaspora audience, the majority of the digital media platforms, particularly those interviewed for this study, focus on individuals residing within Ethiopia.

For instance, Wazema Radio, with its primary content outlets being the website and Facebook, has the majority (87%) of its audience located in Ethiopia, along with some diaspora audiences in the Middle East, Germany, and the US. The audience primarily consists of young, educated males with a keen interest in current affairs. The outlet also targets policymakers and government offices, focusing on public interest stories and national issues.

New Business Ethiopia, a business news outlet, caters to a mixed audience including foreigners, the diaspora, academia, the business community, and NGOs. Its visitors primarily come from the US (not necessarily the diaspora), followed by Ethiopia, the UK, and Germany. Ethio News primarily serves Ethiopian citizens (70%), with a smaller audience group in the Ethiopian diaspora (30%). Alpha Media, a YouTube-based outlet, primarily targets an older demographic, with a significant presence in the diaspora.

The content distribution platform, topical orientations, and content distribution formats influence the geographical distribution of the audience in the digital media space. Platforms that utilize YouTube as their primary medium and focus on video content tend to attract a denser diaspora audience. However, outlets with comprehensive presence on Facebook, websites, Telegram, and other platforms primarily serve the local audience.

It is noteworthy that politics, current affairs, news commentaries, and entertainment topics receive more attention from the diaspora audience compared to regular newscasts and reports in digital media.

A respondent, representing EBC, discusses this characteristic from the perspective of content publishing schedule:

> *If you take our YouTube platform, we publish fresh videos in the evening schedule, mostly after 5pm, to capture the diaspora audience. This was rooted in the experience that overnight video content consumption, which is daytime for the Ethiopian diaspora mostly in the US, is usually high. The difference is highly visible, especially between text-based Facebook content and Video-based YouTube (KII Participant).*

Language preference is a crucial factor influencing the digital media strategies employed by content creators in Ethiopia. During interviews with various media outlets, it became evident that many of them either tailored their content to specific audiences based on language preference or associated language choice with the platform for content distribution. For instance, Addis Standard focuses on engaging urban youth who are fluent in Amharic and Afaan Oromo languages.

Conversely, Fana Broadcasting caters to a diverse audience encompassing different language preferences, platform choices, and demographic indicators. For instance, they maintain Amharic-centric Facebook pages and target English-speaking audiences on Twitter, while also intending to attract more elite users on English-based platforms. On the other hand, Addis Fortune and New Business Ethiopia primarily cater to an English-speaking audience interested in finance and business-related content.

In summary, language preference significantly impacts the digital media strategies of content creators in Ethiopia. These strategies range from targeting specific language-speaking audiences to aligning language choices with specific platforms. For instance, media outlets like Addis Standard, Fana Broadcasting, Addis Fortune, and New Business Ethiopia demonstrate various approaches in their efforts to engage specific local-language-speaking or English-speaking audiences.

Urban Youth

According to content creators, the digital media audience in Ethiopia predominantly resides in urban areas and consists of individuals with internet access. This aligns with the widely accepted notion that access to infrastructure and technology significantly influences digital media consumption. Consequently, this suggests that individuals in rural areas without internet access may have limited engagement with digital media. Conversely, media outlets consistently identify urban areas, particularly Addis Ababa, as their primary audience base. Notably, a noticeable trend emerges whereby the majority of digital media outlets in the sample specifically cater to and serve an urban youth audience, underscoring the fact that digital media in Ethiopia remains primarily confined to urban settings at present.

For example, Fast Mereja and Addis Zeybe concentrate their efforts on urban audiences, with Fast Mereja primarily targeting youth outside of Addis Ababa. Similarly, Dire Tube primarily attracts a youth audience, while Nati XIA focuses on Ethiopian youth and young adults, emphasizing entertainment, humor, challenges, and trends. Although demographic data for the Telegram-based platform TIKVAH is unavailable due to its nature, it primarily seeks to engage the youth, including university students. Additionally, Ethio News primarily caters to political elites and the urban youth in Ethiopia. The entertainment-focused Arts TV, for instance, expresses its audience profile as:

> *...mainly urban dwellers, including cities like Bahir Dar, Hawassa, Gonder, Adama, Addis Ababa, and those in the diaspora, with an age range of 25-44 (KII Participant).*

4.2.2 Audience Understanding

Considering the circumstances under which it originated, the legacy media in Ethiopia did not prioritize understanding their target audience or their opinions about the media content. From its establishment, the media in Ethiopia did not invest much time or effort in comprehending the audience it aimed to serve. Moreover, even after establishing their presence, media outlets often overlooked the needs of their audience. This trend seems to persist in both traditional and digital native media outlets today. Many digital content creators in Ethiopia do not habitually identify specific target audiences before commencing their operations. However, what has changed is that media outlets can now grow an audience informed by analytics and data from their primary content platforms.

When discussing audience targeting with Ethiopian digital content creators, a prevailing trend is that most digital outlets produce and distribute content with little or no knowledge of their potential audience. They adopt a content-first approach, creating content primarily based on their focus areas or specialized interests, without initially identifying or targeting a specific audience segment. While platforms may eventually conduct extensive research or analysis to understand their target audience's demographics, preferences, or characteristics, they may still attract an audience that aligns with their content.

Legacy media outlets in Ethiopia that are transitioning to the digital space admit to not having specific target groups or audiences. Some digital-native outlets are making efforts to address the issue of proper audience targeting. However, in the Ethiopian digital media sector, most audience targeting and re-targeting decisions tend to consider the general audience as the target. Although not qualitatively different from not setting a target audience at all, this approach underscores an increasing realization of the importance of adopting an audience-first approach to content production in the Ethiopian digital space. A content creator in the FGDs describes this clearly:

> *Content producers should gain a comprehensive understanding of their target audience and curate content that aligns with their audience's preferences and expectations (FGD Participant).*

Geographic focus is another significant factor driving audience-targeting decisions in the sector. Ethiopian digital media outlets target audiences based on their geographic location, aiming at the country's residents or the Ethiopian diaspora in the US, Saudi Arabia, and Europe. Language also plays a crucial role in audience targeting decisions of Ethiopian digital outlets, as they tailor their content to Amharic, English, Afaan Oromo, regional languages, and different linguistic communities, which is becoming increasingly common.

Targeting urban and literate audiences is also an important recurring theme in interviews with content creators. Many media outlets specifically target urban audiences, taking into account their distinct characteristics and needs. Some media outlets also prioritize engaging policymakers and government offices to influence decision-making processes and create impact. The growth of internet access and usage in Ethiopia significantly influences audience targeting decisions in digital media. The country exhibits a notable urban-rural divide concerning infrastructure, technology access, and media consumption habits. Audience targeting decisions may vary depending on the content focus, which could be for urban or rural areas, to ensure effective reach and engagement.

4.3 Content Production

The quality and consistency of content production in the Ethiopian digital space cannot always be determined by the institutional strength and background of content creators. In Ethiopia, digital media outlets exhibit diverse characteristics in their content offerings. While some digital-native media start-ups have made a remarkable impact through groundbreaking reporting, established legacy media-linked outlets often struggle to consistently deliver high-quality content.

However, a noteworthy trend in content production is the prevalence of content recycling and repurposing rather than original content creation. Content recycling involves reposting previously used content, either by the same outlet or another, while repurposing involves modifying the duration, format, or delivery of old content to create something new. Participants in focus group discussions (FGDs) emphasized that producing original content with a small number of staff is a challenging endeavor, compounded by a lack of technical skills in utilizing digital platforms.

Both native and legacy digital outlets in Ethiopia commonly engage in content recycling. Legacy outlets often reuse content from their mainstream platforms on their digital arms, paying little attention to the nature of digital platforms and their audiences. Many legacy media outlets openly admit to using digital media primarily for content recycling. This can be attributed to the resistance of mainstream media to adapt to the rapid digital revolution, partly due to a lack of technical know-how and resource constraints. While these outlets may earn significant monetary returns from their primary content platforms, there is little or no interest in investing in original or adequately curated digital content. One FGD discusses this point as:

> *Many content producers predominantly originate from traditional, one-directional media backgrounds, lacking comprehensive digital perspectives. They often struggle with adapting their content to the dynamic nature of various digital platforms. Insufficient familiarity with the distinct characteristics of digital platforms and an inability to create tailored content for each platform results in a tendency to share identical content across multiple online platforms indiscriminately (FGD Participant).*

Furthermore, several native digital outlets in Ethiopia frequently recycle the contents of other mainstream and digital outlets without adding value. They rely on content recycling rather than generating original material.

4.3.1 Media and Content Formats

Digital media outlets utilize various media formats to cater to diverse audiences with different preferences and consumption habits. Text serves as the primary format for content across multiple outlets. It is widely used to deliver news, articles, op-eds, and other forms of content. Video content is also prevalent and provides engaging experiences through short videos, interviews, news updates, documentaries, and program broadcasts. Some media outlets incorporate videos as part of their content delivery format, ranging from news updates and interviews to feature stories and infotainment programs.

Images and photos play a significant role in visual storytelling and are commonly employed alongside text and video content in various outlets. They enhance the overall content experience. While audio and infographics are less commonly used, some outlets utilize audio for news updates, interviews, and reports, while others use infographics to present information visually. Additionally, a few outlets produce podcasts as part of their content formats. Wazema Radio and Dire Tube use audio for news updates, interviews, and reports, while Tikvah and New Business Ethiopia produce podcasts, a less commonly adopted format in Ethiopia. Infographics are creatively employed by New Business Ethiopia, Addis Fortune, and Al Ain to present information visually.

However, according to the findings from the FGDs, the lack of digital storytelling skills undermines the effective use of audio-visuals and photography mediums to enhance digital media content in Ethiopia. Addis Zeybe stands out as an exemplary outlet that makes maximum efforts to utilize diverse content presentation formats to reach a wide range of audiences. It adheres to standards regarding word limits, picture use, and video length for content production across its different digital outlets.

Based on interviews with content creators, the most common digital media content types in Ethiopia are news updates, interviews, and op-ed articles. Several outlets widely adopt these content types to package and deliver information to their audiences. Fana Broadcasting Corp., Addis Standard, and Dire Tube tend to focus on breaking news/news updates despite the fierce competition from user-generated content on social media. On the other hand, outlets like Ethio News specialize in producing perspective pieces.

The fact-checking and verification capacity of digital outlets, including the well-resourced state broadcaster, EBC, is very limited. Most digital outlets, including EBC, Fana, and Addis Standard, lack dedicated fact checkers and a sufficient number of journalists trained in fact-checking and verification.

4.3.2 Content Preference

An analysis of the content categories preferred by digital media audiences reveals intriguing patterns in the content consumption culture of Ethiopians. Firstly, politics emerges as the predominant category, with multiple outlets interviewed in the study emphasizing the politicized media audience in Ethiopia. Notably, Wazema Radio, Addis Zeybe, Fana Broadcasting Corp., Ethio News, Addis Standard, and EBC State Broadcaster all prioritize political coverage. This signifies a considerable interest in political news and current affairs among the audience of these outlets and potentially the entire nation. This was captured by one FGD participant succinctly:

> *Audiences tend to consume news that aligns with their long-held beliefs and interests (FGD Participant).*

Business- and economy-related topics also hold considerable prominence across various media outlets. Platforms like New Business Ethiopia and Addis Fortune are dedicated to reporting on business issues. Social issues receive attention from platforms such as Fast Mereja, which focuses on content related to societal concerns.

On the other hand, outlets like Alpha Media and Al Ain adopt a diverse approach, covering a wide range of topics to cater to the diverse interests of their audiences. These outlets rely on viewership-driven content, aiming to appeal to a broad readership. Other notable content categories include media freedom, sport, university-related topics, cultural/lifestyle subjects, environmental/health issues, entertainment/film/drama, and national and international issues. Specific outlets represent each category, aiming to provide comprehensive coverage within their respective domains.

Over the years, the type of content produced on TikTok has significantly shifted. Initially an entertainment platform, Ethiopian TikTok has evolved to cover political issues, hosting credible news and fact-checking content. Jordin Bezabih and Nati XIA, for instance, prioritize women empowerment and foreign issues/education/prominent individuals, respectively, which is far removed from traditional TikTok-style entertainment.

Digital outlets like Wazema have a different take on content and content sourcing. For instance, focus on specific government offices and public service-providing organizations such as ministries, city administrations, and banks help them to address public interest issues. However, the representative from Wazema Radio acknowledges the challenges of covering stories related to ministries that have caused trouble in the past:

> *Public interest coverage is a very important job of the media, and for that, it is important to work with some critical public bodies and agencies. But this is not easy as some stories we covered in connection to some ministries have put us in trouble in the past (KII Participant).*

State-affiliated outlets primarily focus on promoting government activities/interventions under the label of 'development-oriented journalism'. Some digital outlets have successfully attracted substantial audiences by prioritizing regional and geopolitical issues, rather than local ones, as seen in the case of Alpha Media, which started content monetization within a year of its establishment.

In summary, the most preferred content categories mentioned by the media outlets include politics, business/economy, and social issues. They are followed by viewership-driven topics, media freedom, sport, university-related subjects, cultural/lifestyle topics, environmental/health issues, national and international matters, prominent individuals/celebrities, infotainment, mixed coverage, and women empowerment/violence against women. These categories reflect the diverse interests and priorities of the outlets and their respective target audiences.

4.3.3 Content Volume

In today's media landscape, the significance of delivering content consistently and promptly cannot be emphasized enough. The digital media space in Ethiopia displays a range of outlets with varying daily publishing volumes. Notable outlets like Wazema Radio, Fana Broadcasting Corp., and EBC State Broadcaster stand out for their high daily publishing volumes, encompassing news, op-eds, interviews, infographics, and videos. Wazema Radio publishes twice a day on most platforms and 4-5 times a week on their website. Fana Broadcasting Corp. and EBC produce approximately 30 videos and Facebook news articles daily, covering politics, business, sports, features, and op-eds. This emphasis on multi-platform publishing, including popular social media platforms such as Facebook, indicates a dynamic and competitive digital content landscape in Ethiopia.

In terms of content publishing times, Tikvah, Addis Zeybe, Addis Fortune, and Al Ain follow specific schedules throughout the day. Tikvah and Addis Fortune publish content from Monday to Saturday, between 8am to 5pm, ensuring a consistent flow of content.

Addis Zeybe and Al Ain release at least eight and fifteen stories a day, respectively. These outlets strategically time their content publication to capture their target audiences' attention during peak consumption periods, maintaining a consistent presence throughout the day.

Among the mentioned outlets, some do not adhere to a specific publishing schedule or have a low frequency and volume of content. For instance, Fast Mereja lacks a regular publishing schedule, indicating a less structured approach to content distribution. These outlets may have lower content volumes than those with regular schedules, suggesting potential differences in content production and publishing practices across the sector.

Outlets with regular publishing schedules and higher content frequency prioritize keeping up with current events and providing up-to-date information regularly. This also suggests that they possess dedicated teams and resources to produce a substantial volume of content. On the other hand, outlets with irregular or unspecified publishing schedules may need to work on maintaining a consistent content flow. This could impact their ability to engage their audience and cultivate a loyal readership. These outlets may have a lower content volume, indicating a more selective approach to publishing or limited resources.

4.3.4 Sources

When it comes to accessing information from various sources, digitalization has greatly simplified the process. Government bureaus, private organizations, and development organizations now make information available on their websites and social media platforms through public notices, announcements, reports, and news updates. Previous research indicates a heavy reliance on the government as a source of information in Ethiopian media. However, there are indications that digitalization is enabling outlets to diversify their sources. One informant expressed this change by saying:

> *Gone are the days when we had to wait for a government institution to provide us with basic facts about a particular news story. Now, our main sources are ordinary citizens and the private sector although we still seek information from government offices for the sake of balance (KII Participant).*

Certain digital outlets have observed a diversification of news sources, particularly recalling how, during the Tigray war, international organizations became primary sources alongside the government. However, a significant number of outlets still consider the government as their primary source, followed by the private sector. For example, outlets like Addis Zeybe rely on ENA (Ethiopian News Agency), a state-owned news agency, as a source of government information. One informant commented:

> *Obtaining information directly from the government is very difficult, so we are forced to rely on another news agency as a source (KII Participant).*

During the FGD sessions, a participant pointed out a significant pattern in the Ethiopian information ecosystem, where there is a clear preference for government and supporter outlets over the independent press. This participant stated:

> *Even though our platform is a legal, registered, and professional media outlet, government offices and officials tend not to view digital news outlets as credible sources. Instead, they consider digital outlets as purveyors of disinformation, essentially obstructing information flow from government agencies (FGD Participant).*

4.3.5 Engagement

While some argue that content topic and format are the primary factors influencing engagement, others believe that engagement is seasonal, as certain topics may attract more interest depending on the context. The research covers various outlets that incorporate audience feedback in their content production process, but there are differences in how outlets handle feedback, particularly when it involves objections from the government and other interest groups.

Unfortunately, digital news outlets like Addis Zeybe, New Business Ethiopia, and many others have been compelled to disable their website comment sections due to overwhelmingly toxic political conversations. Even social media comment sections of news outlets are not exempt from this problem. Surprisingly, for outlets like Addis Standard, most of the online harassment is directed towards owners/founders who are not heavily involved in the editorial process.

According to data gathered from informants and focus group discussions (FGD), politics, particularly conflict-related topics, have been the most engaging content across digital platforms for the past four to five years. However, in covering conflicts, most digital outlets tend to sensationalize the news for the sake of generating clickbait, while only a few practice conflict-sensitive reporting. One participant states:

> *Influenced by business models and platform algorithms, digital media outlets often prioritize content likely to generate high click-through rates. Furthermore, the information consumption patterns of polarized audiences within their information bubbles tend to foster the proliferation of clickbait content in the digital sphere (FGD Participant).*

Consequently, government and independent bodies have pointed out that irresponsible media reporting has exacerbated conflicts in various parts of the country, with digital news outlets receiving a significant share of the blame. However, digital media interviewed for this study expressed they use various approaches to deal with conflict-related stories. Alpha Media, for example, presents conflict-related topics as 'perspective' pieces, providing context rather than reporting conflict incidents as news. As for Addis Standard, the solution is strengthening editorial gatekeeping, mostly involving the editor-in-chief in the entire process, from planning to sign-off, whenever conflict-related content is published.

On the other hand, Wazema has suspended one of its op-eds, Geremew, a dedicated page that offers satirical perspectives, citing political sensitivity and the increasing polarization in the country. This illustrates the pressure to self-censor, particularly among outlets registered with the Ethiopian Media Authority (EMA), when attempting to be conflict-sensitive. One participant in the focus group discussion expressed their concern, stating:

> *Digital media are labeled as troublemakers and sources of disinformation, even by some government officials. These labels predominantly target private digital outlets. Consequently, the fear of imprisonment forces these outlets to engage in self-censorship (FGD Participant, Addis Ababa).*

4.4 Institutional and Business Model

Sustainable revenue models and a robust institutional set-up are crucial for the survival of digital media in Ethiopia. Therefore, it is important to explore the main challenges faced by digital media outlets in terms of sustainability and viability. This includes assessing the strength of their human resources, editorial systems, organizational and technological infrastructure, as well as their revenue generation and market share. By examining the institutional capacity and revenue models of digital media outlets in Ethiopia, we can gain insights into the strengths and weaknesses of the digital media landscape and identify areas for improvement

4.4.1 Editorial Systems

The level of formalization and structure in editorial processes varies among digital media outlets in Ethiopia. Some outlets have well-defined editorial policies, regular meetings, and hierarchical decision-making processes. Others take a more informal approach, with collaborative decision-making and content development.

For example, digital native outlets like Wazema Radio, Addis Zeybe, Addis Standard, Dire Tube, Al Ain, and Ethio News have established editorial systems that include guidelines and regular meetings to ensure content quality. Tikvah, with its focus on citizen journalism, follows an editorial process that emphasizes cross-checking information, verifying sources, and discussing issues as a team. Alpha Media, on the other hand, adheres to an editorial policy and uses meetings for evaluation and planning while prioritizing a 'risk-minimizing' approach that avoids sensationalism and exaggeration in conflict stories.

Legacy media affiliates leverage their institutional knowledge and culture to exploit the editorial process for content development. Outlets like digital EBC and Fana, with access to state-linked resources, operate as separate departments under their legacy parent media, following their own independent content strategies within the overarching institutional and editorial guidelines.

For other legacy-affiliated outlets, mainly print, such as Addis Fortune and The Reporter, editorial processes and digital media content are controlled by the legacy parent outlets, with decision-making and gatekeeping handled by the existing editorial structure. Digital outlets in this context serve as extensions of the legacy media, with some freedom to curate print content for their audience.

However, the digital media space also includes non-editorial media outlets and content creators. Some digital influencers, as part of the content creator family, do not prioritize editorial decision-making and content development at present. Additionally, certain digital native media outlets may be understaffed and underfunded, operating as one-person shows for the time being. Despite the absence of formal editorial set-ups and teams, outlets like Fast Mereja argue that implementing a proper check and verification system, with a gatekeeper to enforce it, is still feasible.

In the majority of digital media institutions included in this study, editorial systems and teams are well-established. These institutions hold regular editorial meetings to discuss content, verify information, and make decisions. While editorial policies serve as a guide for issue selection and framing in most institutions, others prioritize aligning content with the platform's nature. However, it is important to note that these structures need to go beyond symbolic gestures and actually influence content production and curation processes.

Only then can we expect to see improvements in the quality of content, audience engagement, and the overall viability of the outlet.

4.4.2 Human Resource

The media industry has undergone a significant transformation with the advent of the digital revolution. This shift has resulted in a transition from labor-intensive to tech-intensive content production systems. In today's digital age, journalists and content creators benefit from the productivity and versatility enabled by technology devices and software. However, it is essential to recognize that, despite these technological advancements, the production process still heavily relies on human knowledge and skills.

In Ethiopia, digital media outlets face specific challenges related to staff retention and productivity. The study conducted with content creators revealed that the underdeveloped media landscape in Ethiopia poses a significant hurdle in finding qualified individuals to fill critical positions in editorial, finance, human resources, and administration. Staffing challenges are prevalent across various media outlets analyzed.

For example, Wazema Radio highlighted difficulties in retaining staff and low productivity among fresh graduates, leading them to rely on three times the regular staff as freelancers for content production. Despite having a substantial following and subscription base, Tikvah struggles to fully utilize all five of its Telegram channels due to a lack of key editorial staff. Alpha Media, despite having seven content production staff members, still requires assistance from support teams like IT, marketing, and finance. These examples illustrate the range of human resource problems in Ethiopia's digital media sector.

4.4.3 Physical Infrastructure

Interviews conducted with various content creator organizations for this study revealed that most of them have well-functioning office facilities equipped with tools and technology. It is worth noting that the majority of digital media institutions have dedicated offices, which demonstrates a high level of professionalism and commitment to their operations. Moreover, these organizations possess the required equipment and tools for content production, including desktop and laptop computers, cameras, voice recorders, and video editing software.

While digital outlets associated with established media platforms operate in well-organized office spaces with proper organizational structures, equipment, and technology, it is important to acknowledge that they may not have the same resources as most legacy and state-affiliated outlets, which have extensive resources for content production and distribution.

Nonetheless, native digital media outlets are not far behind. Many of them explicitly state that they have the necessary content production equipment, including cameras, computers, studios, voice recorders, and editing tools. However, the physical resources available vary among outlets, with differences in software subscriptions, standard studios, and reliable servers. Some institutions have a wide range of resources, including dedicated studios, servers, and software subscriptions, while others have more limited resources and rely on essential equipment. These disparities highlight differences in resource allocation and access within the sector.

However, there are a few exceptions. For instance, in the case of Al Ain, although the outlet previously had a dedicated office, the parent organization has recently decided to fold the office in the capital and have the editorial staff work from home. Support functions like IT, marketing, finance, and administration are no longer conducted in Ethiopia but are directed from the head office. Another notable case is New Business Ethiopia, a digital native outlet currently operating from a modest office space used by its founder, equipped with a few desktop computers and a camera. In line with their nature, the two TikTok influencers included in the study mentioned the lack of office facilities and production equipment, relying solely on mobile phones and laptop computers.

4.4.4 Data and Connectivity

Connectivity issues, such as internet blockades and reduced speed, significantly hinder media outlets' ability to effectively reach their audience, which impacts viewership, content distribution, and audience engagement. Government-imposed internet shutdowns and restrictions further worsen these challenges by limiting access to information and impeding content creation. The media landscape in Ethiopia faces substantial hurdles due to these connectivity issues.

Multiple prominent media outlets have reported encountering connectivity problems, including internet blockades and slow speeds. These issues severely impede their efficiency in producing and distributing content, resulting in decreased viewership and audience engagement.

Selective blockage of social media platforms is common in Ethiopia, prompting most digital media outlets in the country to utilize Virtual Private Networks (VPNs) to bypass these restrictions. Some institutions mentioned employing VPNs to overcome limitations on specific social media platforms, which can enhance access to online resources and potentially increase advertisement revenue. However, it is important to note that VPNs can also deceive platform algorithms, potentially inhibiting local content from reaching the local audience.

The majority of institutions analyzed rely on Ethio-Telecom as their primary internet service provider, despite the emergence of other competitors. Ethio-Telecom continues to play a significant role in providing connectivity to digital media institutions in Ethiopia. However, depending on specific internet service providers like Ethio-Telecom affects content distribution and accessibility.

Data rates do not appear to be a significant cost component in digital content production in Ethiopia, as they were rarely discussed by the institutions interviewed for this study. Only one respondent acknowledged the positive impact of improving data rates in Ethiopia.

To address their connectivity challenges, some institutions expressed an intention to explore alternative service providers. For instance, Addis Standard mentioned considering Safaricom as an alternative due to daily connectivity problems.

4.4.5 Revenue Model

The outlets interviewed for this study rely on various sources of income to sustain their operations. Most digital media outlets have begun earning income through monetization efforts on their leading content distribution platforms. While specific revenue amounts were not disclosed by the media outlets, Alpha Media, Fast Mereja, Ethio News, Dire Tube, Arts TV, and others depend on social media monetization to generate income and sustain their operations. YouTube and Facebook are the most popular social media platforms for monetization among these groups. Although Ethiopia is not eligible for monetization on these platforms, many digital outlets register in eligible countries to generate income.

Among the digital media platforms in Ethiopia, two state-affiliated outlets (Fana and EBC), one legacy-linked outlet (Arts TV), and one digital native outlet (Dire Tube) are among the most successful in monetizing their YouTube content. In addition to a few other legacy media-linked channels on YouTube, these outlets generate a significant amount of digital revenue in Ethiopia. Dire Tube, as a digital native outlet, is a pioneer in generating income on YouTube and other social media platforms. Leveraging its experience, Dire Tube provides digital asset management services to the two major state-linked digital outlets, EBC and FBC, helping them generate substantial digital media earnings in Ethiopia.

While Facebook and Telegram are also utilized by digital outlets in Ethiopia for income generation, their scale and penetration levels are not comparable to those of YouTube. Monetization on Telegram has been challenging and has only recently become available. However, digital native media outlets in Ethiopia explore alternative revenue models with varying degrees of success. Outlets like Wazema Radio, Addis Zeybe, and Addis Standard are exploring non-commercial media by accessing donations and project-based financing to sustain their activities. While Addis Zeybe and Addis Standard already generate income through commercial means, Wazema Radio has recently decided to pursue commercial avenues such as advertisements and other monetization opportunities, as donations and project-based funding prove to be unsustainable. Al Ain, on the other hand, relies on social media monetization and direct subsidies from its parent media in Abu Dhabi for income generation.

Some digital media outlets emphasize the importance of local advertising for the survival of media organizations in Ethiopia. Even those utilizing social media monetization avenues acknowledge the significance of local advertisements. While the impact of COVID-19 and advertisement regulations have negatively affected the advertising sector, it remains the backbone for most legacy media outlets in Ethiopia. Additionally, TikTok is emerging as a platform for attracting advertisements and sponsorships. According to digital influencers like Nati XIA, the platform is now attracting small and medium enterprises for advertising and product promotion.

YouTube is the most monetized content platform in Ethiopia, and multiple institutions interviewed for this study cite YouTube monetization as their primary source of income. The platform generates revenue through advertisements, subscriptions, and merchandising. Local advertisements and sponsorships are also common sources of income for digital media institutions in Ethiopia, appearing on platforms such as websites, social media channels, and YouTube. Some institutions also mention donations and project-based funding. It is important to note that the prevalence of revenue sources and platforms may vary among different digital media institutions.

5 Conclusion and Recommendation

5.1 Conclusion

Despite limited connectivity, Ethiopian digital media outlets have a significant impact on the socioeconomic and political life of the nation. However, there is a lack of understanding regarding content types, ownership structures, and audience preferences within the digital media landscape. This comprehensive report aimed to bridge this knowledge gap by focusing on two key regions, Amhara and Oromia, and one city administration, Addis Ababa. The report utilized a combination of qualitative and quantitative research methods, including observations, interviews, surveys, and data analysis from a sample of 429 digital media audience members and 18 content creators, to provide insights into the intricacies of Ethiopia's digital media landscape. This section of the report presents the major conclusions of the study.

Findings from the audience survey indicate that the top three preferred social media platforms in Ethiopia are Facebook, Telegram, and YouTube. They are followed by TikTok and Instagram in the fourth and fifth positions, while Twitter is the least preferred platform. These preferences align with the content creators' assessment, highlighting the dominance of Facebook and YouTube as primary platforms for digital media content consumption. Additionally, Twitter, Instagram, Telegram, and TikTok also play significant roles in the digital media strategies of content creators.

While many outlets prioritize Facebook and YouTube, some also emphasize their websites as the primary channels for content distribution. Notably, the Amharic Facebook page of the state broadcaster EBC stands out as one of the most popular pages in the country. Fana Broadcasting Corp., another state-affiliated broadcaster, also maintains a significant social media presence. Other notable outlets include Dire Tube, Tikvah Ethiopia, and Arts TV.

The study also reveals insights regarding the time spent and digital media usage patterns among audiences in Ethiopia. Most respondents reported spending between 2 and 4 hours daily using digital media, which is relatively less than the global average of 7 hours. The survey data also indicates varied frequencies in digital media usage, with many users checking their digital media platforms 2 to 3 times a day or 4 to 5 times a day, suggesting a frequent and habitual engagement with digital media.

Smartphones are the most preferred devices among surveyed respondents in Ethiopia for accessing the internet, followed by laptops and desktop computers, while tablets are the least preferred device. This aligns with global trends.

On the content creators' side, interviews highlighted that the digital media sector in Ethiopia caters to a diverse audience in terms of demographics, interests, and platform preferences. Content creators emphasized demographic indicators such as age ranges, gender representation, geographic reach, language preferences, and platform choices. The audience predominantly comprises younger individuals, focusing on youths and young adults aged 18-34, with platforms also targeting audiences aged 25-49. Male audiences tend to dominate across platforms, except for specific cases like a TikTok influencer who attracts more female followers.

While the primary audience base of digital content creators is located within Ethiopia, there is also a sizable diaspora audience concentrated in the Middle East, the United States, and Europe. Digital media outlets primarily target urban areas and individuals with internet access, with a particular emphasis on Addis Ababa. It is worth noting that digital media in Ethiopia is primarily an urban phenomenon, reflecting the digital divide between urban and rural regions.

The audience study reveals that Ethiopian digital media users primarily use social media for entertainment, information seeking, maintaining interpersonal connections, and escapism. They prefer consuming online news and information through videos and text formats. On the other hand, the inquiry into content creators highlighted that text, video, and images are the most commonly used formats in digital media outlets in Ethiopia, with some outlets also incorporating audio, infographics, and podcasts. However, there is a trend of content recycling and repurposing, rather than original content creation.

Regarding content preferences, the audience study found that digital media users in Ethiopia have a strong demand for entertainment, politics, sports, and religious issues on online platforms. YouTube-based digital media outlets emerged as the most preferred platforms for consuming such content. The study identified Donkey Tube, Feta Daily, Mereja TV, Ethio 360, TIKVAH, Zehabesha, EBS, BBC Amharic, Mesnsur AbdulKeni, and EOTC TV as the top 10 most preferred digital media platforms in the country.

When exploring the reasons for audience preference, the study discovered that the selected media outlets were valued for their ability to produce quality entertainment, provide current and up-to-date information, offer reliable and balanced reporting, and deliver educational value. On the other hand, content creators emphasized the coverage of politics, business, and social issues as major categories in Ethiopian digital outlets, indicating significant audience interest in these topics. News updates, interviews, and op-ed articles were found to be prevalent content types across platforms.

This study has examined both the audiences' perceptions of digital media platforms and the assessment of media outlets themselves. It was found that Telegram, followed by websites and YouTube, are the most trusted platforms among the audiences in Ethiopia. Interestingly, Facebook, despite being the most preferred platform, ranked fourth in terms of trust levels. This highlights the importance of trust and reliability in disseminating news and information.

Legacy-affiliated outlets can leverage their editorial and organizational systems inherited from parent media, which can enable them to align digital content with existing structures. Editorial processes, cross-checking, and information filtering are implemented in many institutions, guiding content selection and framing. However, the effectiveness of these processes depends on their ability to influence content production and curation, ultimately affecting the quality and engagement of the audience.

The study found that online misinformation, disinformation, and mal-information are rampant in the audiences' daily usage of digital media. This indicates that digital media users in Ethiopia are exposed to significant fake news in their digital content consumption. Furthermore, the study highlighted the limited opportunities for digital media users to enhance their media literacy skills in online platforms, suggesting a lack of education in discerning accurate information.

Interestingly, the content outlets interviewed for the study reported that most digital outlets do not have dedicated fact-checkers or journalists trained in fact-checking and verification. This reveals a potential gap in ensuring accuracy and combating disinformation, further reinforcing the audiences' exposure to harmful falsehoods.

The study examined recent developments in the telecom sector in Ethiopia, focusing on the dominant service provider, Ethio-Telecom, which boasts 70 million subscribers. It was observed that Ethio-Telecom and Safaricom offer services at nearly equal tariffs. However, Safaricom, despite superior internet speed, has not managed to garner customers, and Ethio-Telecom remains the dominant market force.

While the telecom sector has seen

advancements, connectivity challenges persist, posing significant obstacles to content production and distribution. Slow internet connectivity hampers access to information and adversely impacts the productivity of media organizations.

Virtual Private Networks (VPNs) are employed to overcome selective blockage of social media platforms. However, the use of VPNs can inadvertently discourage the dissemination of local content to local audiences, as platform algorithms can be tricked. Although there have been improvements in the cost of internet usage, concerns regarding the strength and stability of connectivity remain prevalent.

The study identified generating revenue as another key challenge for digital media outlets.

Limited advertising opportunities, financial constraints, and the absence of regular sponsorships or donations require outlets to develop sustainable business models with multiple revenue streams. Many outlets rely on monetization efforts on platforms like YouTube and Facebook, generating income through advertisements, subscriptions, and merchandising. However, the prevalence of revenue sources and platforms may vary among different digital media institutions.

5.2 Recommendation

The following recommendations address the key findings and conclusions of the study on digital media in Ethiopia. They cover three main stakeholders: media organizations, government media regulatory institutions, and media development organizations.

By following these recommendations, stakeholders can contribute to the growth and development of a robust and inclusive digital media landscape in Ethiopia.

Media Organizations:

- **Prioritize revenue diversification:** Media organizations should focus on diversifying their revenue streams to reduce dependence on traditional advertising. This can be achieved through partnerships, sponsorships, and innovative monetization strategies, as indicated by the findings of the study on limited advertising opportunities and financial constraints.

- **Enhance digital literacy and fact-checking skills:** Media organizations should invest in enhancing the digital literacy and fact-checking skills of their journalists and content creators. This will improve the quality and accuracy of their content, addressing the prevalence of sensationalism and misinformation highlighted in the study.
- **Utilize digital storytelling tools and techniques:** Media organizations should leverage digital storytelling tools and techniques to engage their audience. They should seek training and capacity programs to explore advanced storytelling formats such as infographics, animation, and others, as the study found that Ethiopian digital media outlets are limited in utilizing these formats.

Government Media Regulatory Institutions:

- **Foster an enabling environment:** Government media regulatory institutions should streamline administrative procedures and reduce bureaucratic hurdles to create an enabling environment for media organizations. By providing incentives for innovation and growth, they can support media organizations in overcoming challenges related to staff retention, productivity, connectivity limitations, and revenue generation.

Media Development and Support Organizations:

- **Provide capacity-building programs:** Media development and support organizations should offer capacity-building programs for digital media outlets, focusing on content production and verification. These programs can enhance skills in digital content creation, digital marketing, audience engagement, and sustainable business models, addressing the challenges identified in the study.
- **Support media viability intervention:** Media development and support organizations should provide financial and technical support to media organizations, particularly start-ups and independent outlets. This assistance can help address revenue generation challenges and technological infrastructure limitations faced by digital media outlets.
- **Collaborate on media literacy programs:** Collaborate with media organizations, government media regulatory institutions, and other stakeholders to develop comprehensive

media literacy programs tailored to the needs of Ethiopia's digital media users.

- **Establish fact-checking initiatives and platforms:** Support the establishment of fact-checking initiatives and platforms in collaboration with media organizations. These initiatives can provide training, resources, and technical support to enhance the accuracy and credibility of digital media content in Ethiopia.
- **Advocate for media education in formal curricula:** Advocate for the inclusion of digital media literacy and media education in formal education curricula at all levels. This ensures that young people are equipped with the necessary skills to responsibly navigate the digital media landscape, which aligns with the study's finding that the audience predominantly consists of younger individuals.
- **Provide technical and financial assistance for innovative projects:** Provide technical and financial assistance to media organizations in developing and implementing innovative digital media projects. This support encourages experimentation and the adoption of emerging technologies, facilitating the creation of engaging and interactive digital media content that meets the diverse interests and preferences of Ethiopian audiences, as identified in the study.

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About Internews

Internews is an international non-profit organization whose mission is to empower local media worldwide to give people the news and information they need, the ability to connect and the means to make their voices heard. Internews provides communities the resources to produce local news and information with integrity and independence. With global expertise and reach, Internews trains both media professionals and citizen journalists, introduces innovative media solutions, increases coverage of vital issues and helps establish policies needed for open access to information. Internews programs create platforms for dialogue and enable informed debate, which bring about social and economic progress. Internews' commitment to research and evaluation creates effective and sustainable programs, even in the most challenging environments. Formed in 1982, Internews is a 501(c)(3) organization headquartered in California. Internews has worked in more than 100+ countries, and currently has offices in Africa, Asia, Europe, the Middle East, Latin America and North America.

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