MUSHROOMING RADIO

Nadra Garas, Vice President of Research at **InterMedia**, examines the trend in vernacular and community radio in Africa, drawing on data and analysis from African Broadcast and Film Markets, a new report published jointly by InterMedia and Balancing Act

A rapid increase in the number of radio and TV channels in Africa over the last three years has piqued the interest of international broadcasters. TV broadcasting outlets have increased steeply: out of 40 markets featured in a new report, nearly half (18) have licensed Free-To-Air TV channels. Similarly, liberalisation of radio broadcasting in many countries has led to an explosion in the number of stations, particularly those broadcasting in local languages. Known in East Africa as the "vernaculars," these stations have been a high-growth area over the last five years. A striking example of this trend is in Uganda, where there are now more than 150 radio stations, 69% of which cater to audiences in the country's 38 different languages.

INDIGENOUS RADIO INCREASING

Liberalisation of media markets in some parts of sub-Saharan Africa has led to the rise of indigenous vernacular radio. This recent shift both reflects and contributes to the overall trend in the region of the growth of a more diverse, competitive and consumer-driven media marketplace in some countries, while others are hampered by legislation that hinders the growth of private independent media. Media are consolidating into large conglomerates all over the world, but the trend in sub-Saharan Africa is increasing diversity in radio outlets. This has led to fragmentation of audiences and advertising revenues, a challenge for international broadcasters contemplating entering this growing market.

Indigenous radio stations cater to the diversity of languages within each country, allowing them to reach wider, local language-specific audiences. Indigenous and community radio, which is fast becoming the most popular, has exploded on the regional media scene. Given the limited access to newer technologies and terrestrial TV, Sub-Saharan Africa is still largely a radio market where listeners access radio through traditional terrestrial FM and AM.

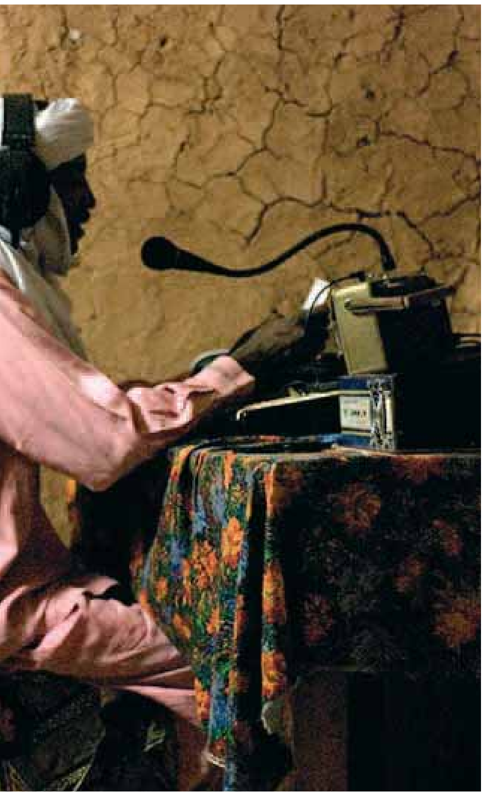
> "The trend in sub-Saharan Africa is increasing diversity in radio"

SUSTAINABILITY CHALLENGE

The growth of local radio offers a wide range of opportunities for the rise of alternative voices expressing local concerns, cultures and issues communities grapple with in everyday life. Stations reach a narrow target audience, and invite community participation, including as producers of content. In this sense, community radio parallels the trend in new media that has seen increasing fragmentation combined with greater audience involvement in content production and dissemination. On the other hand, African community and vernacular radio are often regarded suspiciously, seen as fuelling marginalisation, exclusion, ethnic tensions and community conflicts. The challenge indigenous and community radio faces is sustainability, both financially, technologically and in terms of relevance, in an increasing competitive environment.

EAST AFRICA LIBERALISATION

In Kenya, the past five years have ushered in the rise of a number of private and public regional languages radio stations (up to 49)



Tuareg community radio station in Timia, Air Mountains, Niger

catering to speakers of the regional languages such as Radio Kameme and Radio Inoro, both broadcasting in Kikuyu. Uganda has over 70 private commercial FM stations and local community-run stations. The majority of these new stations started since media were liberalised in 1993 but the largest growth was evident after 2000. In a six year period, there was a dramatic increase in private FM and community radio in Tanzania, from 14 stations in 2000 to 47 stations in 2006. Similarly, the radio market in Burundi has experienced an increase in the variety of stations available on the FM airwaves. Since the mid-1990s, the EU, the UN and other funding agencies began supporting non-state radio to broadcast news, education and programmes aimed at national and ethnic reconciliation. In 2004, the first private station was launched in Rwanda, which is now joined by a cluster of competitors – 21 are licensed and 14 currently on air.

RADIO STILL DOMINATES

In Nigeria, radio remains the dominant medium for acquiring news and information. With 36 state run radio services, and a growing number of private FM stations, radio is still the most ubiquitous medium nationally, despite the slow but steady growth of TV and restrictive legislation. The number of stations has mushroomed in Senegal over the past seven years, reaching 80 stations including local, community, national state run and commercial stations, and the dense FM dial of Dakar-based stations. The year 2000 ushered in a rapid growth in radio stations from about 40 to 60 local stations. The boom in radio stations includes community radios, which more than doubled from seven in 2000 to 19 in 2007. In Togo, 80 stations were on the air by late 2006, mostly in the entertainment-based market evolving since the late 1990s.

The growth in radio stations also holds for the southern countries of Africa (with the exception of Zimbabwe.) There were 122 licensed radio stations in South Africa in 2005. Of these, there are about 90 community radio stations. Many of the new channels are regionally based, for example, Ukhozi and UW FM have much of their audience among the Zulu speakers in the Eastern Cape, Motsweding FM in the Northern Cape. In Mozambique, since the signing of the peace accords in 1992 and elections in 1994, new private radio stations, such as Radio Miramar, SFM and RTK, are primarily aimed at city-level in terms of reach, but cover both national and local issues. Locally based radio stations received a big political push in 1994, when international donors launched programmes to support decentralised media outlets throughout the country.

STRONG COMPETITION

This new tier of radio broadcasting poses strong competition for international broadcasters who are increasingly criticised for being too far removed from the events on which they are reporting, limited in the number of languages and dialects in which they broadcast, and challenged to develop pertinent programming to retain and attract listeners across the board. On the other hand, international broadcasters have more potential partners.

The implications of proliferation of radio stations for programming by international broadcasters may be increased customisation and targeting; where the international broadcasters have to make strategic decisions about developing programming for single format stations or increase the number of broadcast languages to reach audiences that may listen to radio on vernacular stations. The existence of these stations implies a larger effort to acquire more information on local radio outlets to target the most credible and suitable broadcast partner. Research has confirmed that damage can be done to an international station's brand if its chosen partner is perceived as being weak. In terms of credibility, an international broadcaster's reputation is usually defined by its partner.

International broadcasters may choose to use a variety of incentives to recruit local partners: monetary, increased access to high calibre and/or branded programming, exclusivity of content, and customised content. ■

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REPORT

This article is adapted from **African Broadcast and Film Markets**, a new report published jointly by InterMedia and Balancing Act. The report is a detailed look at the state of broadcasting in 40 African countries, including data from 17 in-country audience surveys. For a detailed breakdown of contents: http://www.balancingact-africa.com/broadcast_markets.html