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*State-run ZNBC is dominant enough to have the widest national reach and to broadcast in several local languages. As a result, private stations located in specific provinces find it hard to garner sufficient advertising revenues and expand beyond their small listener base.*

## Zambia's State Run ZNBC Dominates Radio Listening: What Does This Mean for Information Access?

October 2010

**The scope of Zambia's media environment and consequent access to information is limited by the country's modest level of economic development and the lack of infrastructure to service non-state media outlets. Radio is the most accessible and popular medium. But most Zambians only have access to state-run Zambia National Broadcasting Corporation's (ZNBC) radio stations.**

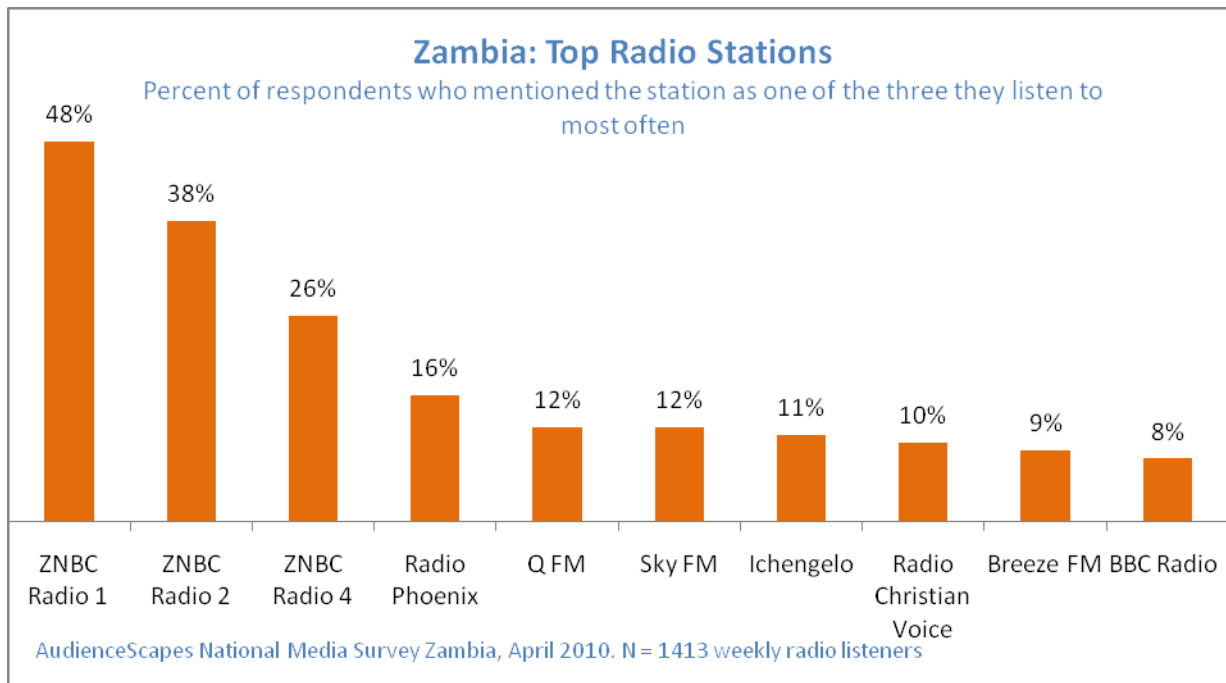
Radio listening in Zambia is dominated by state-run ZNBC's three radio stations - Radio 1, Radio 2 and music/entertainment-based Radio 4. **Seventy eight percent of weekly radio listeners in Zambia said they often listen to one of three state-run stations.** Zambia also has a few locally focused private or nonprofit, community radio stations, which broadcast in English and/or local provincial languages,<sup>1</sup> but these FM stations -- whether commercial or nonprofit - have limited geographical reach (usually just within a district or province) and are not nationally accessible. ZNBC is the only radio network with national reach and thus dominates radio listenership nationally (see Chart 1).

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<sup>1</sup> Zambia is divided into nine provinces, each administered by an appointed deputy minister. Each province is subdivided into several districts with a grand total of 72 districts. The provinces are: Central, Copperbelt, Eastern, Luapula, Lusaka (capital region), Northern, North-Western, Southern, Western.

ZNBC was formally incorporated in 1988. Until the opening up of airwaves in 1994, it was the only provider of news, information and entertainment in the country.<sup>2</sup> Commercial stations began to spring up after the 1994 Zambian National Broadcasting Corporation Act liberalized the mass media market, and the African Media Barometer reports that there were 39 radio stations operating in Zambia in 2009 -- including the state-run stations, as well as a wide variety of commercial, community, educational and religious stations.<sup>3 4</sup>

Chart 1



ZNBC continues to dominate the airwaves because it has an extensive broadcasting infrastructure, greater economic stability and large broadcasting capacity. In contrast, nonstate stations (whether commercial or nonprofit), generally lack these advantages, given the limited revenue streams available to them in a modest advertising market.

**The overall reach of ZNBC ensures it has a larger share of advertising revenues, while commercial stations generally struggle.** Community radio stations and religious stations, on the other hand, are dependent on bilateral aid or support from religious institutions or NGOs to sustain themselves.

<sup>2</sup> The Role Of The Zambia National Broadcasting Corporation (ZNBC) In Meeting Zambia’s News And Information Needs. A Public Discussion at MISA Zambia’s Advocacy Programme on Media Law Reforms in Zambia, held on March 25, 2004. Available here: <http://www.misazambia.org.zm/downloads/ZNBC%20Public%20Discussion.pdf>

<sup>3</sup> Zambia 2009. African Media Barometer. Published by the Media Institute of South Africa and FES Media Africa. Available here: [http://fesmedia.org/uploads/media/AMB\\_Zambia\\_2009\\_English.pdf](http://fesmedia.org/uploads/media/AMB_Zambia_2009_English.pdf)

<sup>4</sup> Country Report on Community/Local Media in Zambia. North South Intensive Course: Community Media and New Technology – where next?; Fidelis H. Muzyamba, Lecturer, University of Zambia Department of Mass Communication, Monday, 08 June 2009 Available here: <http://sockom.helsinki.fi/commedia/Muzyamba%20The%20Experience%20of%20Community%20media%20in%20Zambia.pdf>

ZNBC radio also broadcasts diverse programming covering a range of interests, including news, soap operas (foreign as well as locally produced), and religious and political discussion programs, children’s shows (foreign and local), sports and gender programs. Most of the programming on ZNBC is locally produced.<sup>5</sup>

ZNBC’s **Radio 1** broadcasts news and information, and also provides some cultural programming and coverage of development-related topics. It broadcasts in seven vernacular languages -- Bemba, Kaonde, Lozi, Lunda, Luvale, Nyanja and Tonga – all of which air at different times of each day to provide equal access to the country’s various linguistic communities. All vernacular languages get equal time across all locations -- that

is to say that someone tuning into Radio 1 when it is broadcasting in Bemba will hear that language, no matter where in the country that listener is located.

**Radio 2** also broadcasts a mixture of news, culture and development-related programs, but exclusively in English. **Radio 4**, the state’s entertainment channel, also broadcasts in English and is available through FM radio in most provinces. Its content is mainly Zambian and foreign music.<sup>6</sup>

**Listenership Breakdown by Demographics:** The overall national ratings (Chart 1) mask differences in listenership to state radio among different demographics groups, such as age, income<sup>7</sup> and location.

ZNBC’s Radio 1 appears to have lower popularity ratings among youth (those between 15-24) than with older age groups (Table 1). It is also more popular with rural listeners than urban dwellers.

Note that Radio 1 also broadcasts some programming that is targeted at particular demographic groups such as rural women (for example, the station runs a program using content

**Table 1: Radio 1- Popularity by Demographics**  
 Figures represent percentages of those who named this station as one of three they listen to most often

By Age Groups		By Income Groups	
15-24	41%	Tier 1 (lowest)	44%
25-34	48%	Tier 2	57%
35-44	50%	Tier 3	48%
45+	58%	Tier 4 (highest)	40%
By Gender		By Location	
Men	49%	Urban	30%
Women	47%	Rural	59%

AudienceScapes National Media Survey Zambia, April 2010. N = 1413 weekly radio listeners

<sup>5</sup> Zambia 2009. African Media Barometer. Published by the Media Institute of South Africa and FES Media Africa. Available here: [http://fesmedia.org/uploads/media/AMB\\_Zambia\\_2009\\_English.pdf](http://fesmedia.org/uploads/media/AMB_Zambia_2009_English.pdf)

<sup>6</sup> Ibid

<sup>7</sup> AudienceScapes analysts define income levels based on a self-assessed, qualitative measure. This builds from a question asking people “Which of these answers reflect your family’s financial situation?”: The available answers are the following: “We don’t have enough money even for food” (Tier 1, N =342); “We have enough money for food, but buying clothes is difficult” (Tier 2, N =656); “We have enough money for food and clothes and can save a bit, but not enough to buy expensive goods such as a TV set or a refrigerator” (Tier 3, N=521); “We can afford to buy certain expensive goods such as a TV set or a refrigerator”, or “We can afford to buy whatever we want” (combined in Tier 4, N=409).

generated by rural women and through rural radio listening clubs' programs).<sup>8</sup> In fact, the rate of listenership for Radio 1 among rural women is nearly double the rate among urban women (58 percent versus 31 percent).

Listenership for Radio 2 remains more or less stable across all demographic groups analyzed (Table 2). Table 3 shows that Radio 4's popularity is strongest among youth/young adults (15-24) and those between 35 and 45. It is also more popular (or perhaps more accessible) in urban areas.

**Table 2: Radio 2- Popularity by Demographics**  
 Figures represent percentages of those who named this station as one of three they listen to most often

By Age Groups		By Income Groups	
15-24	36%	Tier 1 (lowest)	32%
25-34	36%	Tier 2	40%
35-44	39%	Tier 3	39%
45+	41%	Tier 4 (highest)	36%
By Gender		By Location	
Men	38%	Urban	33%
Women	37%	Rural	41%

AudienceScapes National Media Survey Zambia, April 2010. N = 1413 weekly radio listeners

**Table 3: Radio 4- Listenership by Demographics**  
 Figures represent percentages of those who named this station as one of three they listen to most often

By Age Groups		By Income Groups	
15-24	31%	Tier 1	25%
25-34	24%	Tier 2	24%
35-44	30%	Tier 3	21%
45+	20%	Tier 4 (highest)	38%
By Gender		By Location	
Men	28%	Urban	40%
Women	25%	Rural	18%

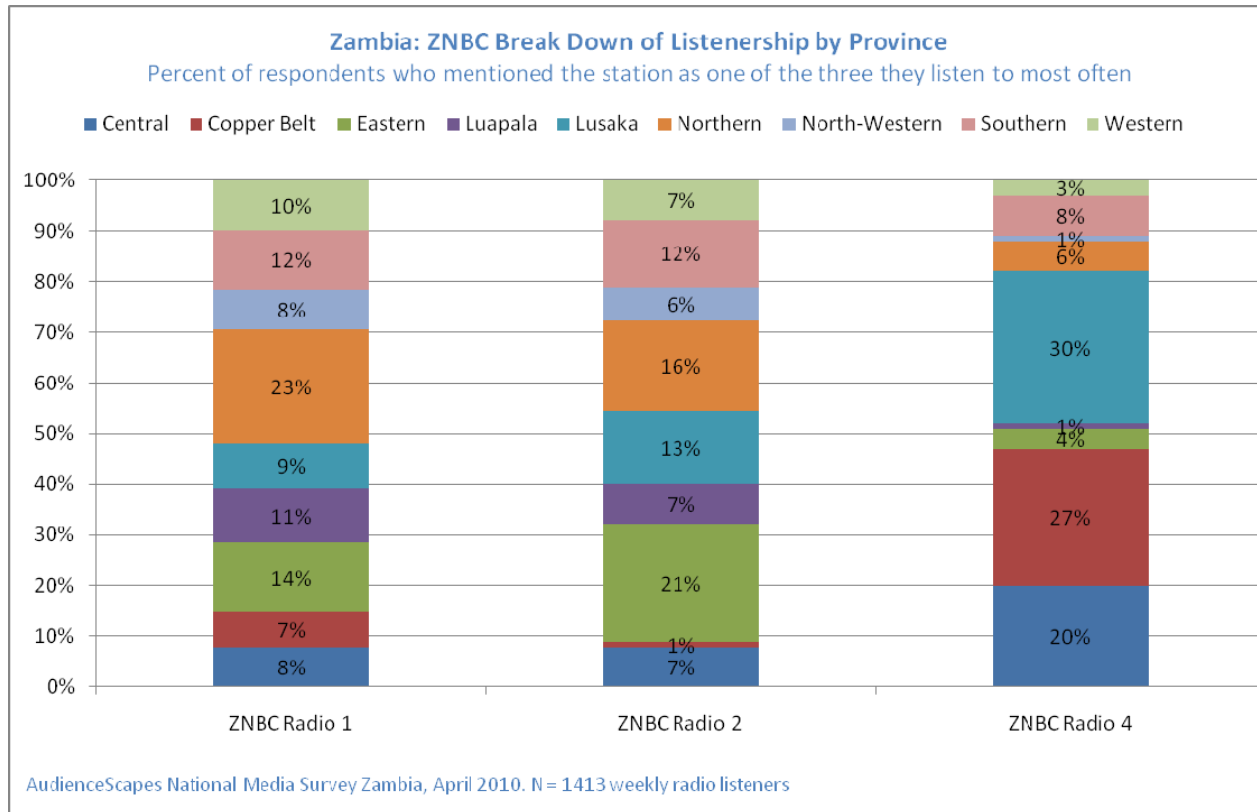
AudienceScapes National Media Survey Zambia, April 2010. N = 1413 weekly radio listeners

<sup>8</sup> Zambia 2004 Africa Media Development Initiative with BBC- Report available at [http://www.bbc.co.uk/worldservice/trust/researchlearning/story/2006/12/061208\\_amdi\\_zambia.shtml](http://www.bbc.co.uk/worldservice/trust/researchlearning/story/2006/12/061208_amdi_zambia.shtml)

## Provincial Differences in ZNBC Listenership

Chart 2, which breaks down top radio choices by province, illustrates that ZNBC's Radios 1, 2 and 4 seem to have a fairly diverse range of listeners around the country

Chart 2



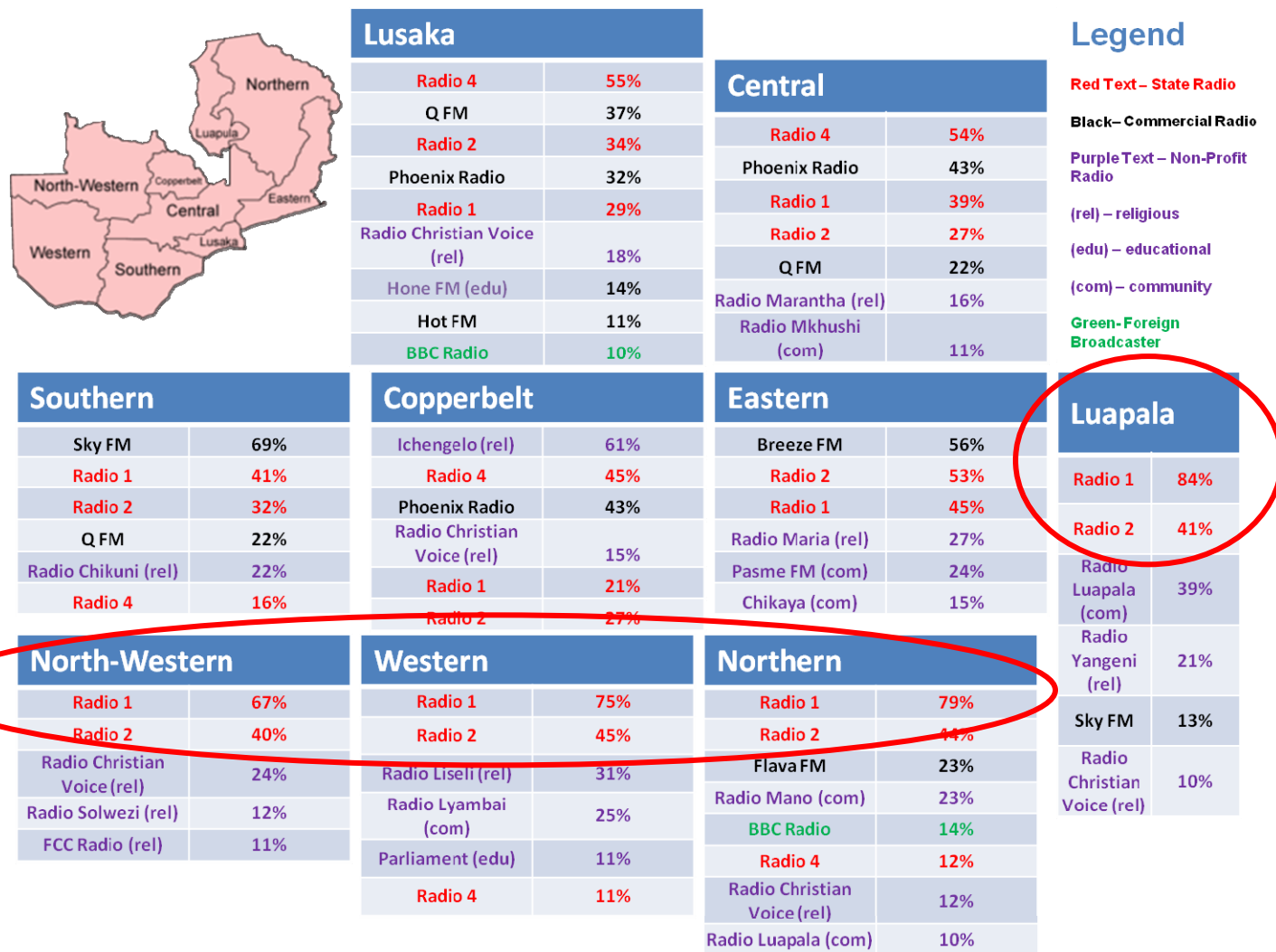
**But** when we analyze choice people make **WITHIN** each province, it varies substantially by province (Map 1, below).

A wide variety of FM stations are available to people in provinces such as Lusaka and Copperbelt, and listenership there is dominated by FM radio. In Lusaka, they also listen to ZNBC's entertainment-based Radio 4, but this is in combination with these FM stations. In Copperbelt, listenership is completely dominated by religious station Ichengelo, and ZNBC's Radio 1 and 2 are popular among few. In Eastern and Southern province, ZNBC competes with their own provincial stations -- Sky FM and Breeze FM, respectively. Respondents in these provinces are thus likely to receive information from a wide variety of sources on the radio.

On the other hand, fewer private FM stations exist in Northwestern, Western and Luapala provinces. Their community stations (in purple) are not listed by many as most "listened to most often". There are a few nonprofit radio stations operating in these four provinces, but most do not seem to reach a sizeable audience. Most of the community station in these provinces - Radio Lyambai, Radio Maria, Radio Christian Voice, Radio

Solwezi and FCC Radio - are religious radio stations. Here, listenership is completely dominated by ZNBC's Radio 1 and Radio 2.

**Map 1: Top Stations WITHIN Provinces**  
**Percent of respondents WITHIN each province who mentioned the station as one of the three they listen to most often**



AudienceScapes National Media Survey Zambia, April 2010. N = 1413 weekly radio listeners. N = 126 Central, 256 Copperbelt, 191 Eastern, 78 Luapala, 245 Lusaka, 186 Northern, 72 Northwestern, 180 Southern, 79 Western.

From this we can see, that radio, while clearly the most dominant and widespread medium, has yet to diversify sufficiently to offer its listeners a truly varied range of choices for news and information. **ZNBC's market dominance may, in fact, be a hindrance to free and fair media development.** Though ZNBC is not completely controlled by the government, according to the African Media Barometer report, the content produced and the freedom of reporting given to journalists is “suppressed by the nature and ownership of

these institutions.” In terms of news and current affairs, the African Media Barometer report states that “the state broadcaster is not at all balanced or fair in its reporting. The content on both ZNBC TV and radio continues to be heavily biased towards the ruling party and the government.”<sup>9</sup>

**The obstacle to media development is economic.** State-run ZNBC is dominant enough to have the widest national reach and to broadcast in several local languages. As a result, private stations located in specific provinces find it hard to garner sufficient advertising revenues and expand beyond their small listener base. In order to reach a wider audience, the commercial stations choose to limit their political and news-related content.

Non-commercial radio stations that are focused on development-related issues are run by NGOs, religious organizations or educational institutions. While they are, in principle, catering to local information needs, their reach is limited and as our survey results show, they are unable to move to a wider, national audience outside the provinces from which they broadcast.

**Even though ZNBC is dominant nationally, and especially in certain provinces, local stations can compete better with national state-run radio networks by presenting themselves as providers of locally relevant and community-based information.**

Though Radio 1 and 2 do run some locally relevant programming, community stations might focus on crafting relevant content for their listeners. This would allow them to distinguish themselves from ZNBC as independent (from state control), culturally relevant and local sources of information on which their audiences can rely.

This diverse media environment also presents potential opportunities for development organizations seeking to spread information via broadcasting conduits, without using state sponsored media. While state-run radio does broadcast some development related content -- it is not very much, nor is it necessarily suited to local needs in a given province.

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<sup>9</sup> Zambia 2009. African Media Barometer. Published by the Media Institute of South Africa and FES Media Africa. Available here: [http://fesmedia.org/uploads/media/AMB\\_Zambia\\_2009\\_English.pdf](http://fesmedia.org/uploads/media/AMB_Zambia_2009_English.pdf) (Page 16, 54)

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**The AudienceScapes project ([www.audiencescapes.org](http://www.audiencescapes.org)) is aimed at bridging knowledge gaps about media preferences, personal communication habits and the use of information and communication technologies (ICTs) in Africa and in other developing regions. It is also a tool for identifying needs in media, communication technologies, development information and development policy.**

The project's name refers to the benefits for development organizations of understanding the changing communication preferences and needs of their 'audiences'—the target populations and policymakers whom they are trying to support. Launched in April 2009 with support from the Bill & Melinda Gates Foundation\*\*, AudienceScapes comprises four main elements:

**National quantitative surveys** looking at (1) the general population's access to and use of media, access to and use of information and communication technologies (ICTs), and word-of-mouth communication habits; and (2) how these factors affect people's acquisition of knowledge about key development topics. Pilot projects are taking place in Ghana, Kenya and Zambia.

**In-Depth Interviews** with policymakers to find out how they gather, assess, share and disseminate critical information related to development topics, and find out how global development partners can play a constructive role in this process. The interviews were begun in the same three African countries.

**The AudienceScapes website** which provides access to the program's analytical reports as well as the quantitative survey data. The website also has detailed "Country Communication Profiles" of several countries in multiple developing regions, plus other resources for development practitioners working in communication, media development, technology development and policy dialogue.

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*\*\*\*The findings and conclusions of the AudienceScapes research project are those of InterMedia and do not necessarily reflect the positions or policies of the Bill & Melinda Gates Foundation.*