



How to drive impact and ensure sustainability in the media sector



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Introduction

Working in media has always been attractive for donors because of its potential to address scale in ways that few other intervention areas can. A radio programme might have an outreach into the millions while a training programme might be able to address the needs of a few hundred or thousand trainees.

While this might help with those lionised *outreach* numbers, if intervention in this area doesn't make a difference to women and men's lives then it doesn't matter and if that difference doesn't last, then it relies on more donors coming along to fill the gaps. So the question in working in the media has always been about how to combine this outreach with ensuring impact or effectiveness and sustainability.

This is where using a Market Systems Development (MSD) approach in a media intervention can have a lasting and massive impact, as the criteria for successful MSD intervention are difficult to argue with:



Impact

interventions must have a positive, defined, developmental impact on those who are excluded from accessing or benefiting from certain areas of an economy or society.



Sustainability

The effects of intervention, and the system to reproduce these effects, must last beyond the period of external funding well into the future.



Scale

intervention must impact the highest possible number of women and men, leveraging scarce donor resources to have the greatest impact on the immense development challenges.

Women IN Business (WIN) a five-year program funded by the Swedish International Development Agency and implemented by TechnoServe, has used an MSD approach to economically empower women micro-entrepreneurs in Mozambique. Using WIN's work in media as well as research synthesising lessons from elsewhere can contribute insights in both of these areas.

- The importance of format in ensuring the effectiveness of transmitting information and ensuring impact.
- Secondly, the importance of data in ensuring sustainability and the many potential models under which this can work.

These insights are now presented to improve work in media programming for development.

The current state of media in Africa

The traditional media landscape has been significantly challenged financially. As a result, model and content are changing in search of sustainability, which is having a negative impact on both the quality of the information and who gets to receive it.

Traditional media (newspapers, radio, and TV) have seen advertising revenues reduce as resources are diverted to new media (social media, online adverts etc). State-owned media corporations cannot compete in terms of salaries and budgets and so often produce low-quality content. In search of dwindling advertising revenues, commercial media defaults to low-production cost, high audience outputs such as music and sport. They do not have any information provision or public service incentive. Government still acts as one of the largest advertisers on commercial outlets, and so their independence in producing content is compromised. Newspapers continue to produce 'information-driven' content, but with falling circulations, both production and consumption are defaulting to dense urban areas. Even still, newspapers strive to preserve circulation and advertising, so increasingly focus on more populist narratives. Finally, donor funded content predominates in rural areas and is almost exclusively 'pay to play'. A key example is community radio which contains primarily donor producer content and has low levels of engagement.

New media has the opposite problem – rapidly rising consumption but little quality control. The volume is so much higher that curation is impossible. It is populism in its purest form, and with very transparent metrics by which popularity might be assessed.

While the contraction and adaptation of traditional media has been compensated for by the explosion of new media in terms of outreach, a gap has emerged (or widened) in certain types of information reaching certain types of women and men. With no public service incentive, rural areas frequently have 'news deserts' where women and men have no access to this kind of information. In some cases, this is not a question of a physical access barrier but rather one of proliferation and the absence of content control. Instead of a single popular newspaper where women and men read about news, sport, and other current affairs, women and men now have a choice between a social media platform with lots of digestible and varied populist content or a donor funded TV channel telling them to use condoms.

Other demographic factors matter too. In households where men own or control the only mobile phone they also control the information. When compared with a situation where everyone gathered around a radio, the consequences for the effectiveness of development impact is clear.

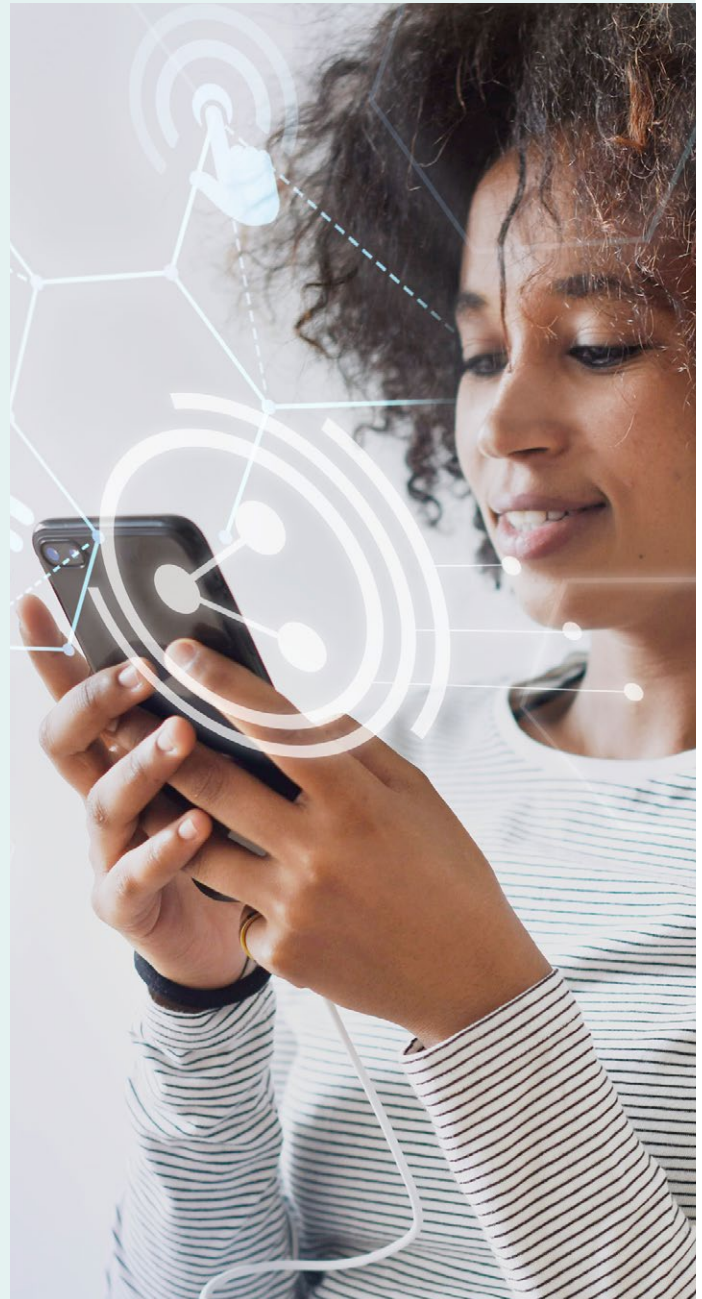
WIN's interventions started here – which recipients do we need to change their behaviour and what is the message, messenger, and delivery format that would suit them best?

Lessons for impact: format matters

Information is key to overcoming a wide range of development challenges including health, education, livelihoods, emergency response, in addition to its role in learning and consumption.

Media – including radio, television, newspapers but also new media including social media and communications platforms – is a conduit of information that can be used for learning. The effectiveness of that learning can be considered as a product of i) the message, ii) the recipient (target audience), iii) the messenger (who is delivering the message, when relevant), and iv) the delivery format (and media channel). While the essence of the first of these dimensions cannot really be changed – whether you're an advertiser trying to increase awareness of your product, an educator trying to convey a lesson, or a development actor trying to improve understanding of public health challenges, the way in which you convey that message appropriate for your target group (language – complexity, tone, local languages; key points; etc.) can greatly help in getting the message across. Furthermore, strategy should be adapted to maximise impact from the other key areas.

Regarding the recipient, both observable and unobservable characteristics determine how particular women and men receive and respond to information. While you cannot change the nature of the recipient of the information, you can change who is receiving information to ensure that those most likely to receive the information are those most likely to respond to it. For example, telling a child to drive carefully is not useful, whereas if you can ensure that an adult is the recipient of the information, they are more likely to respond to it, better still, an adult that drives, or an adult with characteristics which are associated with poor driving. As below, data is critical to this – knowing who is consuming what, when, and how do they respond.



The second piece of the puzzle is the messenger. The explosion in *influencer marketing* in recent years lays bare the fact that women and men respond differently based on who is delivering a message. For more traditional media channels, the popularity of the TV and radio hosts can play a big role in increasing trust in the message.

The final component is the closely related factor of the delivery format; *how* information is delivered. At a very basic level is the platform – some learn better by reading, others by watching, for example. However, in addition to the platform, format plays a crucial role in the receptiveness of different groups to different interventions.

Some important aspects of the delivery format that affect engagement and learning include:



Length

The attention span of audiences is getting shorter. While shorter-form content might increase viewership, there is likely a trade off in depth, so finding the optimum length for your message and your target group is key.



Frequency

Repetition is important for learning. But too much repetition leads to disengagement so finding the optimum frequency of information dissemination is critical. This varies according to audience characteristics too, such as gender.



Timing

Research when does your target audience consume media – and aim for broadcasting during those times – who is around in the day and who is at work, for example.



Style

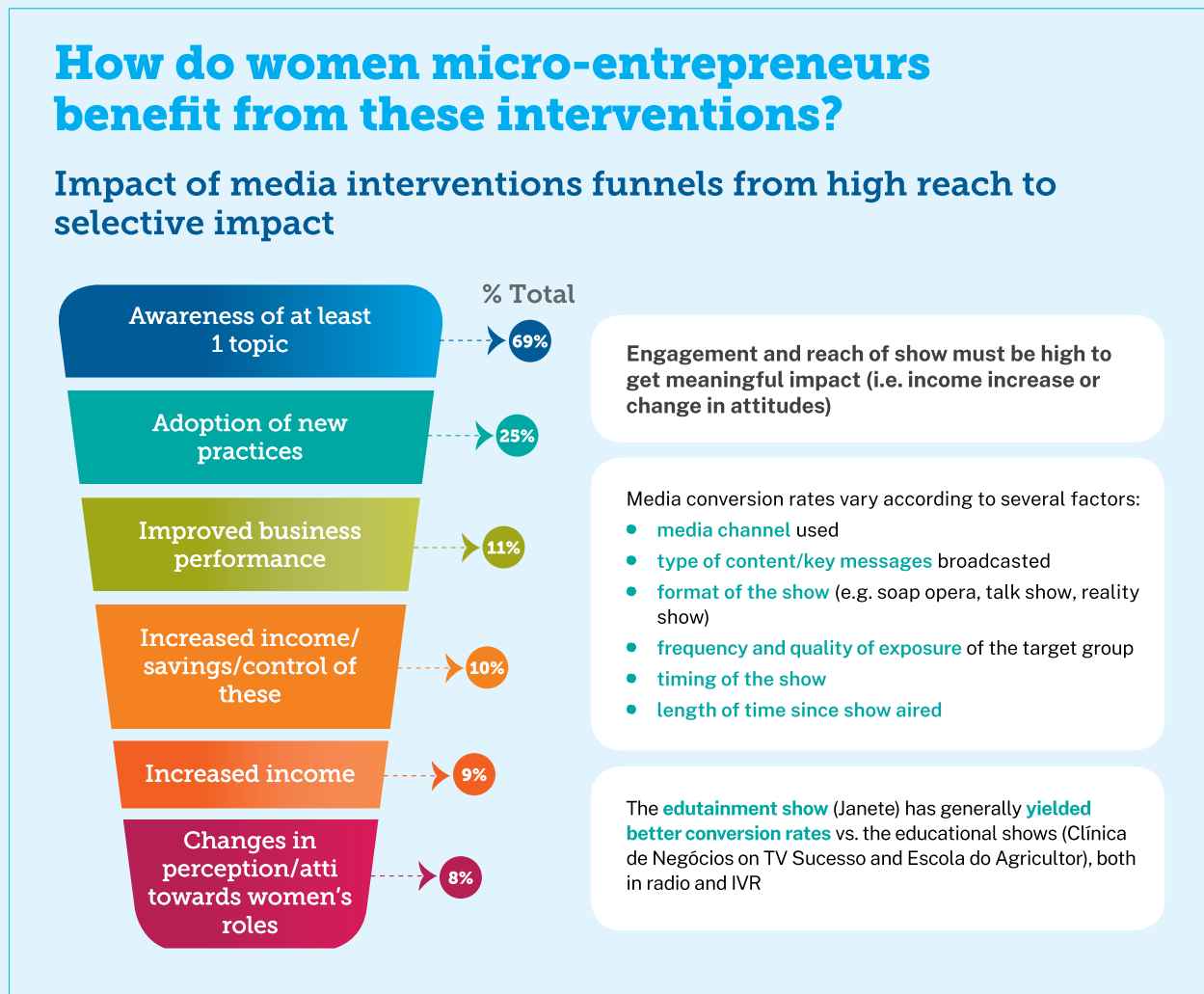
Even keeping constant the message, messenger, platform, length, and frequency, there is still a lot of possible variety in style which can affect the quality of learning. Soap operas, talk shows, documentaries, quiz shows, or lectures could all be used on the same platform with the same message but with different learning outcomes for different groups.

Win's lessons on impact, targeting your audience and format

Impact

Maximizing reach, through engaging content and using a variety of target audience appropriate channels, is key to ensuring impact for your desired program population. Across three media programs WIN collaborated on, data shows that impact funnels from awareness of a topic (69%), to adoption of new practices (25%), to increased income (9%), to changes in perception/attitudes towards women (8%).

Figure 1: Media conversion rates in WIN's interventions



Targeting your audience

Understanding your audience and its consumption habits is key to ensuring increased access to and behaviour change of your audience. Here are some of WIN's lessons on women micro-entrepreneurs' media consumption habits and preferences:

- 1 Women are home and free during evenings and weekends so these are the best slots for programs
- 2 Women have lower access to TV and radio, lower use of smartphones/ data, and less time – this makes timing more important.
- 3 Women role models are important for inspiring and educating other women, and this creates more engaging programs
- 4 Women respond better to representation of their peers in the content
- 5 Women have less access to information on available media – you need to be creative in publicising new content where and when they would be able to access that publicity.

Format

Format, style, frequency - all equally matters in ensuring greater access to and behaviour change of your audience – in WIN's case, of women micro-entrepreneurs. WIN's experience has shown that TV had the broadest reach while edutainment (radionovela) had the deepest impact, followed by talk show with live testimonies. Additionally, mixing a variety of channels will ensure greatest reach of your target audience. Reaching large audiences is key as not all viewers/listeners change their behaviours as shown in *Figure 1: Media conversion rates in WIN's interventions*

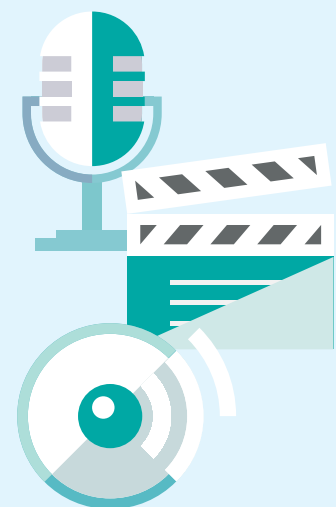


Figure 2: WIN's experiments with formats for impact

Program	Platform	Style	Frequency/slot	Length	Targets	Audience ¹
Clínica de Negócios	TV and Facebook live	Debate with case studies or on a theme	Weekly Sundays (17h)	15m	Women entrepreneurs, nationally	382,000 (63% women)
Janete	Radio and IVR (Interactive voice response)	Short-form soap opera in multiple languages	Weekly, morning and evening slots	15m on TV and 3m on IVR	Women entrepreneurs, nationally	246,000 (21% women)
Janete Way Forward	Facebook, website, WhatsApp with Chatbot	Audios, infographics, videos and images	N/A	Varies	Nationally	Endline in Q1 2023
Escola do Agricultor	TV, Community Radio and IVR	Educational programming	Wide spread including repeats	30m (TV), 15m (Radio), 3m (IVR)	Women in agriculture	215,000 (35% women) for radio show
Pergunta do Dia	TV and Facebook live	Audience polling during news programmes	Wednesdays 12-15h	Introduced and discussed during short intervals several times during news programme	Gender and entrepreneurship issues affecting both men and women	166,500 (60%)

¹ WIN's audience: micro-entrepreneurs, including unemployed and small holder farmers

To learn more about WIN's experience in media, [click here](#) to read the full Case Study on "How can gender-responsive media effectively women's economic empowerment"



Lessons for sustainability: the importance of data

In the majority of media systems, the role of data or researchers is central.

Data is essential to measure whether your investment is having the desired impact, be it in behaviour change in target audience as with WIN, audience reach for content channels or producers, or purchase of a product. Concretely, data can help to:

- 1 Shape the content women and men want to consume, by understanding what they want to watch
- 2 Assess what women and men are consuming and when
- 3 Assess people's behaviour in response to consuming media in terms of both content and advertising.
- 4 Move away from the "pay to play" model by supporting programs to create more audience-engaging development content (understanding what appeals) and then selling this to those with an incentive to pay for it (using data to demonstrate audience reach).

As such, data should be of great value to key players in the media sector, such as:

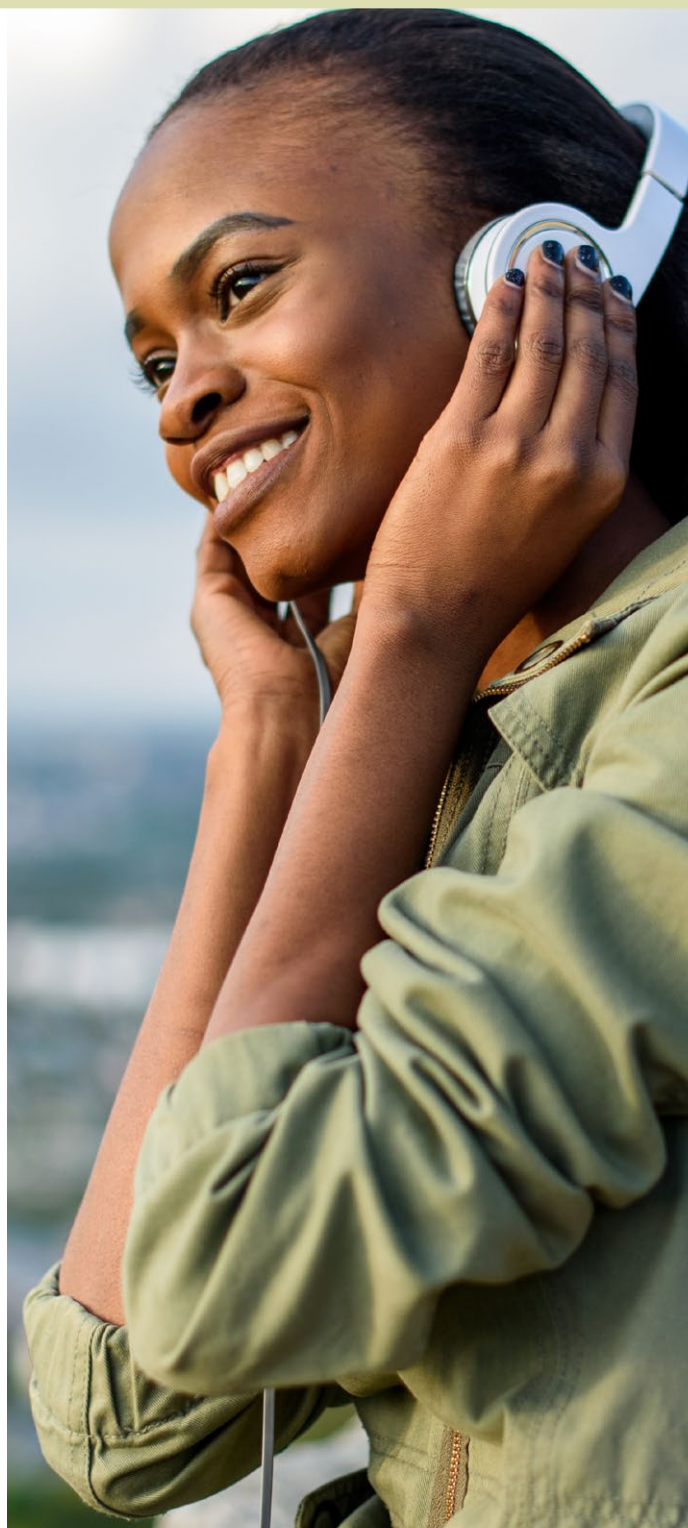
- 01** Content producers who want to shape content that will be popular and influential. Who sponsors them varies according to content and context. Most often, it is the audience they attract that drives the sponsors. In some cases as well, it might be schools who see this as an appropriate delivery channel. In other cases, companies might have a profit motive – onselling related products. And sometimes there is embedded philanthropy where no other incentive exists

- 02** Content platforms (media channels: TV, radio, social media, etc.) who want to be able to sell access to their audience, and disseminate engaging content that will engage existing and attract new audiences.

- 03** Commercial advertisers who want to know when to advertise their products to access the highest number of women and men who are likely to buy them.

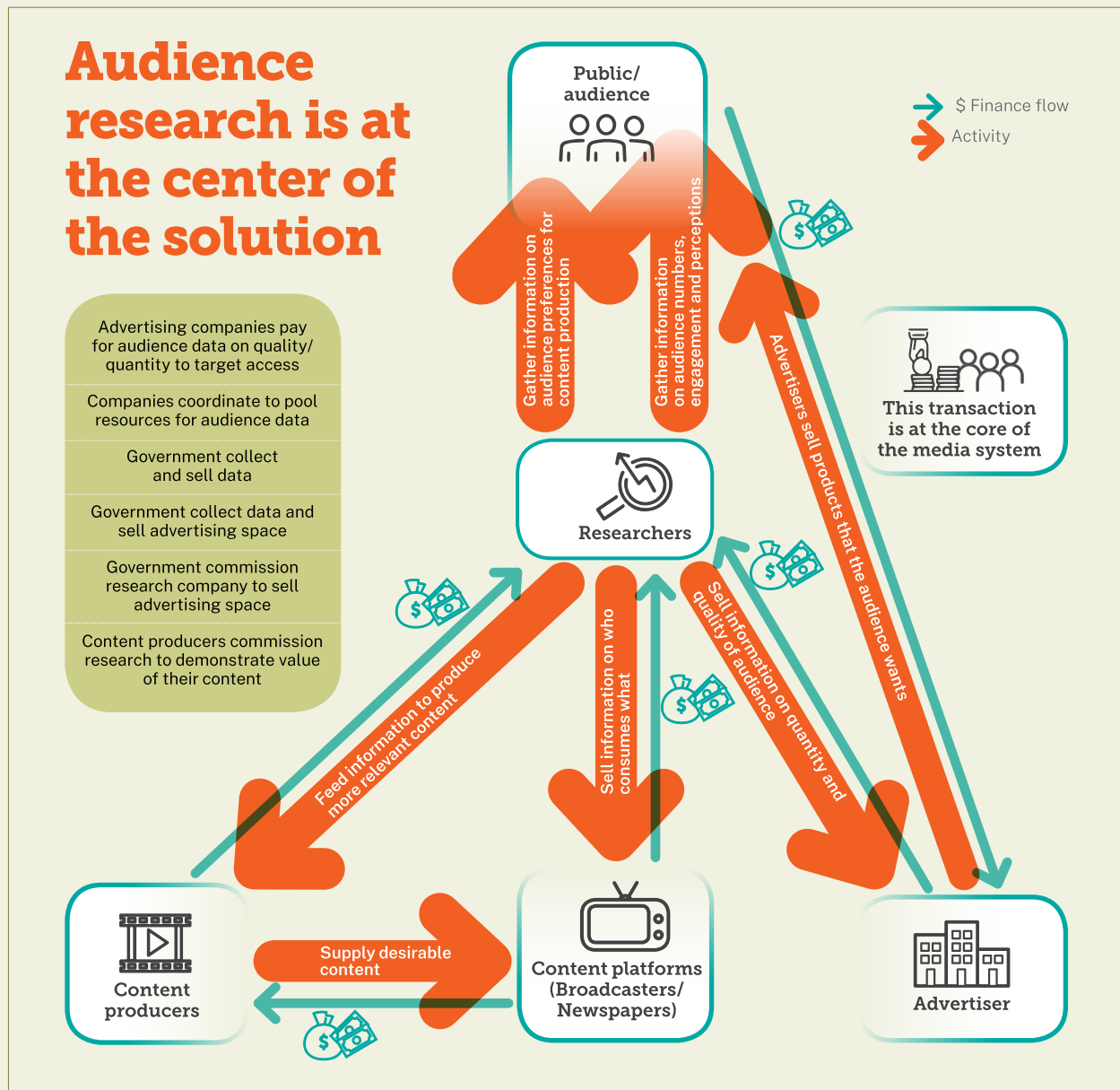
- 04** Researchers who collect and sell data on audience preferences, reach and, potentially impact to content producers, content platforms, and commercial and non-commercial advertisers

- 05** Non-commercial advertisers (such as public information providers/ governments) who want to know when and where they can have the greatest outreach and influence.



However, there are many reasons why data markets don't work

Figure 3: How data plays a role in the media sector's transactions



1. In emergent markets, key actors who might have an incentive to pay for data do not yet have the capacity to pay.
2. Data collection itself can be expensive in emergent markets – with remote and rural users being more expensive to access because they only have access to more basic technologies, if any. People live far away from each other and do not have access to the internet or data.

3. Media markets in emerging economies typically exhibit various market failures which disincentivise investment in data:

State monopolies can discourage innovation in content platforms

Unsophisticated advertising markets mean undifferentiated consumption – for example some TV channels charge blanket fees per minute regardless of slot

Trust issues in part caused by dysfunctional business membership organisations, reduce the chances of coordinated collection and sharing of data; businesses perceive competitive threats from collaboration rather than potential competitive advantages and so will not, for example, share the cost of surveys.

Low-income consumers discourage investment in advertising due to the low potential purchasing power for many products.

There are a range of models that have been used in different contexts to overcome these failures

Model 1: Content producers pay for data on a case by case basis

In some cases, content producers might invest in research to demonstrate the efficacy or popularity of their content. With digital media (social media, SMS, websites, blogs and more), much of this data is readily available. A youtuber can very quickly use tools to analyse their audience, demographics and engagement including advertising click-throughs. All of this helps to justify the value of their content to potential private and public advertisers who might seek to use, imitate or buy their content.

In the analogue media landscape that still predominates in poorer communities, deliberate data collection remains important. WIN was able to partner with the research company Ipsos: it used rural surveying for one of the media programs on agriculture (which is rarely done), and combined it with urban surveys that are already partly paid for which made it more affordable. WIN also added impact questions to the audience surveys that are already being done on a monthly basis, maximizing existing resources. For panel surveys, Ipsos also introduced surveys via telephone. The value of the data was clear as it supported partners obtain more funding and sponsoring opportunities, as well as assessed the impact of these different models on women beneficiaries, as is shown in WIN's Media **Case Study**.

Model 2: Data providers collect data and licence curated datasets through subscription models

In Kenya, Ghana and other slightly more advanced media markets, Geopoll as well as other audience research companies collect data on their own account which is then packaged through a range of products which are sold to media companies and advertising agencies. It is clear that a market has to reach a certain potential size in order to cause research companies to invest in the data collection without guaranteed revenues. However, once this has begun, the potential hazards for media companies and advertisers become competitive dangers of not participating – if other platforms or sellers of competing products are able to sell advertising space on the basis of data, then your competitive position will be severely compromised if you do not make that investment.

In Ivory Coast and Kenya, Kasi Insights collects data at their own cost and begins providing it to advertisers and media companies for free so that they can begin to develop and refine their business models based on the data and see the value in continuing to fund collection longer term. Such a market penetration strategy is likely necessary in emergent markets where such behaviours have not previously been prevalent.

Listen to the full interview with Kasi Insights here!

Model 3: Advertisers commission researchers to discover consumption habits to tailor advertising

In some very immature markets, bespoke individual data collection is conducted on behalf of advertisers. In Mozambique, for example, Coca-Cola commissioned research on media consumption in order to know where to advertise. However, so immature is the market in Mozambique that Coca-Cola are often taking that data to content platforms (TV stations, radio etc) and telling them exactly what they want to broadcast and when. In such cases, platforms are losing potential revenue by not being able to price according to value when it comes to content or advertising. There are also few positive externalities from this model – it may benefit the single entity that pays for the research, but that research is not then used by others who may be able to improve their business model or their impact using the data.

Model 4: Business membership organisation coordinate to commission shared research

In emergent markets, individual investments can be seen as too high and too risky for individual advertisers or content platforms, while for research companies, collecting the data without any anchor buyers for that data can be prohibitively expensive.

According to Geopoll, approximately \$6,500 monthly investment will get a baseline audience measurement done and this can be collected on behalf of several potential buyers. This isn't the norm because of the absence of a strong collaborative nature within private sector firms in the majority of African markets. However, there are important successful cases.

Kenya Audience Research Foundation (KARF) is a not-for-profit institution which acts as an intermediary procuring and providing data on behalf of its users (see figure 2). This overcomes the barrier of prohibitive initial costs and mitigates the challenges of competitive pressures due to the independence of the organisation.

A similar role is played by the Broadcast Research Council (BRC) of South Africa. The BRC operates in a more sophisticated media market place but have been able to place a wide range of complex data provision services for its members overcoming some of the above challenges.

Listen to the full Geopoll interview here!

Model 5: Content platforms commission audience research to increase advertising revenue

While this model is very common in sophisticated media markets it is much less common in Africa. In Uganda, this model has operated well within radio which is a very competitive space. Here, the majority of national radio stations now know audience figures by time slot and have helped to shape content.

In a less sophisticated market such as Mozambique, it is very rare for some of the reasons outlined above. However, one market leader has a competitive advantage in that content production costs are lower owing to a global structure, which allows them to conduct audience research for its own outputs. This model works for that company, but advertisers suffer as they don't have comparison or independence in data and consumers suffer as they are only gaining the advantages of a single media outlet using their data.

Model 6: Government commissions, uses and sells research

In Nigeria, the Communications Authority commissions regular large-scale audience research. It uses this research to design various policies as well as its own communications strategies. However, it also sells this data to various advertising agencies, content platforms and content providers. Under this model, the problem of low capacity to pay for research and perceived competitive pressures are overcome by the government acting as a single entity funding data collection. If the government sees a public interest argument, it is also, in this case, entitled to sell the data at different rates depending on the value that the use of that data might have – for example, it may sell the data to healthcare providers at a lower rate than to sellers of tobacco. Research companies also state that this model leads to the highest quality of data collection as the increased leverage of other datasets and larger sample sizes that results from government buy-in.



Potential Donor Roles in the Future of Mozambique's Media

There is clearly no recipe or single model for a successful, sustainable, and impactful media sector which can help donors deliver on their development objectives. What has been shown here is that there are ways, through understanding content and audience, to improve the sustainability and impact of intervention – developing the media rather than using it simply as a tool to deliver a message. The specific trajectory of Mozambique's media is still uncertain; it relies of the specific capabilities and incentives of different individuals and organisations to change their behaviours. Important players include the content developers, the platforms, the advertisers, the governance actors, and the research companies, all of whom are likely to have to do something differently to move the sector forward.

Development programming in this area can play an important role by acting as a facilitator of this development rather than an impediment to it. For those delivering public information in a direct way, the minimum criteria should be to use the market rather than work around it – commission research locally to understand audience engagement, decide on a channel which responds to your objectives, commission content developers who understand the market. This is especially true for reaching women as part of the audience – the sector needs to understand how women consume media and not assume it is the same as men. For those, like WIN, with more ambitious objectives of market transformation (that seek to shape the market rather than just use it), the key is to find likeminded collaborators with a willingness to change and experiment with ways that you can help them to do so. Pilots in these different models for sustainable data collection and use are an excellent entry point for this and several could be piloted at once.

If you are interested in learning more about WIN's media initiatives and learnings, please click [here](#) to access the Case Study on *How can gender-responsive media effectively increase women's economic empowerment?*

To contact our team, please visit [our site](#)

For more information, please visit:
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