



Civil Society and Media Leadership Program



Liberian Media and Advertising Market—CSML

Understanding the Media and Advertising Market in Liberia

Conducted by IREX
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1.Executive Summary

The USAID-funded Civil Society and Media Leadership Program (CSML) is focused on supporting Liberians as they build a new citizen-state relationship. Post-conflict Liberia is shifting focus from stabilization to development. Strong civil society and media sectors are needed to drive the informed civic participation that leads to good governance, dynamic democracy and economic growth. The CSML five-year goal is to sustain peace in Liberia through greater inclusion, giving a voice to, informing, and engaging Liberian citizens. The International Research and Exchanges Board (IREX) in partnership with The Carter Center (TCC), Social Impact (SI), the Liberia Media Center, and the Liberia Women Media Action Committee are working together to address the capacity needs of Liberian civil society and media organizations. The program objectives incorporate a series of deliverables designed to strengthen the capacity of civil society and media organizations to address citizens’ participation in and ownership of government policy formulation and implementation. Overall, the program will reinforce the strategic message of good governance through an empowered citizenry, building peace and democracy through a robust culture of participation.

CSML has two overall sub-objectives:

Sub-objective 1: CSOs have the capacity to foster democratic development and good governance

Sub-objective 2: Independent media has the capacity to foster democratic development and good governance

This market research seeks to address Sub-objective 2 with specific focus on improving media sustainability. A total of 400 randomly selected residents of Monrovia were surveyed. The findings identify consumer media usage preferences, advertisement awareness and preferences, and issues that media face in gaining advertising revenue.

Major findings include:

Television

Fifty-two percent (52%) of respondents own a television. Most respondents watch television was prime time (47.3%), followed by early evening (40.3%), late night (25.8%), over lunch, (16.5%), early morning (8.8%), and mid morning (5.3%).

The television stations viewers watched on a regular basis included: RealTV (57.3%), PowerTV (44.5%), SkyTV (26.5), ClarTV (24%), LN TV (16%), Love (8%), International TV Stations (4%), and Cable Stations (1.8%).

Favorite shows include Local News on Power/Sky/Real TV, African movies on Power/Sky/Real TV, and Crossfire on Real TV.

Local news was identified as the most important programming option, with 62% of respondents saying local news is important to them, followed by sports (59%), religious programs (56%), African or local movies (53.3%), international news (51%), music videos (51%).

When it comes to advertisements on television, men are more likely to buy something after seeing a television advertisement.

Radio

Eighty-six percent (86%) of respondents own a radio, and 94.3% percent claimed they listen to the radio. Early morning has the highest listen base followed by evening (57.8%), afternoon (36%), after work (33.3%), and late night (47.3%).

News bulletins topped the list as the favorite program type, followed by religious programming, music, call or phone-in shows, sport, talk radio, and news magazines (32%). Popular programs included, Coffee Break on UNMIL, and Fifty-fifty on Sky FM.

Truth FM, UNMIL, and ELBC emerged as leaders in the radio market. Older, wealthier males are the most likely to pay attention to radio advertisements. Middle-aged women are more likely to be affected by radio ads than their male counterparts.

Print

The market share of weekly newspaper readership is as follows: The Democrat (26%), The Daily Observer (23%), The Inquirer (13%), The Heritage (10%), FrontPage Africa (10%), The Analyst (6%), The Informer (4%), The Public Agenda (4%), Plain Truth (3%), and The Liberia Express (1%).

Men in every age bracket are more likely to pay attention to ads in the newspaper than women. Informative ads are considered more memorable than funny ads for newspaper readers.

Market Issues

Interviews with the media organizations and the organizations that buy ads suggest that both groups would benefit from a clearer understanding of the market. Slow payment is a major issue for media and companies desire high quality services when buying advertisements.

2. Introduction

CSML endeavors to build the professional capacity of the media sector. This research seeks to support CSML in its efforts to help partners become more economically sustainable and provide quality content to Liberians.

A sustainable and competitive media sector is a foundation for a democratic society. One part of ensuring competition and sustainability is to have media organizations truly

understand media usage patterns. In many parts of the world, there are media surveys or usage surveys conducted each quarter or on a semi-annual basis. In such surveys, media consumers are asked about their preferences for print, radio, and television. Media organizations buy the results of surveys and use the data to align their programming with the audiences' needs. This type of evidence-based programming and content development makes media organizations more competitive and better able to serve the interests of the media consumers.

There is no economic support for such a media usage study in Liberia. The cost is too high and the media organizations themselves are not yet able to fund it. As such, IREX funded the first baseline of media market in Liberia. The research intends to determine preferred outlets and what impact commercials or advertisements are having on media consumers. The intent is to help identify how media organizations could work to improve service delivery by targeting the right advertisements at specific audiences, thus ensuring that advertisers are getting their money's worth. The data in this report will help media managers understand the market, identify additional markets and design the best approach to explore untapped markets and increase advertising revenue. This is essential for the sustainability of media outlets in this country.

3. Methodology

The methodology of this research is two fold. First, CSML conducted a random survey of 400 residents of Monrovia, the political, media and economic capital of the nation (for a description of the sampling technique, see Appendix A). The market research was conducted in the Greater Monrovia area of Montserrado County in February 2011. Twenty (20) enumerators were trained and used to conduct the survey (see Appendix B for a list of the enumerators). Of the 20, 25% were females. This research sought to measure media consumption, advertising preferences, and purchasing intentions (see Appendix C for the survey questions). The information is intended to be shared with media outlets as a sort of proxy audience survey to help media organizations understand media consumption patterns.

Second, the CSML team comprising of the International Research and Exchanges Board (IREX), Social Impact (SI) and the Liberia Media Center (LMC) conducted in depth interviews with 12 businesses, media and government offices inquiring about the current and potential advertising market (see Appendix D for a list of the interviewees and their response status). Questions were asked about audience research, how advertising rates are set, buying and paying for advertisements, and expected returns on investments into advertising (see Appendices E-G for the interview questions).

The two data sets provide a well-rounded picture of the media landscape in Monrovia. The findings provide valuable data about consumer needs and preferences in media content and advertising. Additionally, the interviews with media, businesses and government provide a baseline of the current advertising sector in Monrovia and identify clear areas for IREX/CSML to develop trainings and sector-wide consultations.

4. Limitations

The sample size for the in-depth interviews of media partners, businesses and government ministries or agencies is small. Seven out of eight media partners filled-out the questionnaires, three out of eight businesses filled out the questionnaires, three out of seven government ministries/agencies filled out the questionnaires and just one of the four UN organizations filled out the questionnaires. Representatives from 27-targeted entities did not have the time for face-to-face interviews. To increase the response rates, some of the questionnaires were hand delivered while others were emailed to try and gain responses from these organizations. Tremendous efforts were made to get all 27 organizations to be part of the research, but only 14 organizations filled out the questionnaires. The low response rates means that the answers to the questions, though valuable for understanding the demand side of the advertising market, should be considered as individual responses rather than as generalizable statements.

5. Liberian Media Consumption Patterns and Preferences

There is no standardized audience survey in Liberia. Audience surveys, whether through people meters or diaries, provide valuable information to media organizations and outlets about patterns and preferences. In the absence of such data, media managers and editors can only make programming decisions on more informal information such as number of callers to talk shows, anecdotal evidence and “gut feelings.”

This research seeks to provide a small piece of the Monrovia audience attitudes and behaviors. In February 2011, IREX CSML and its partners Social Impact and the Liberia Media Center conducted a survey of 400 randomly selected Monrovians in neighborhoods across the city (for more information on the sampling technique, see Appendix A). The method used random sampling to ensure that survey findings were generalizable. The locations for the survey were selected based on the (2008) demarcation of the Liberia Institute of Statistics & Geo-Information Services (LISGIS). The research covered selected clusters in the Greater Monrovia vicinity. The clusters were obtained from a list of 12 zones obtained from LISGIS geographic mapping exercise conducted immediately before the 2008 census. Monitoring & Evaluation Manager Joshua Kpelewah used the census data to determine the population of each zone to be selected using the widely accepted Population Proportional to Size (PPS) sampling procedure. Sample size was based on a Monrovia population of 970,824 residents. A sample of 400 randomly selected residents was deemed sufficient for a 95% confidence level.¹

Social Impact developed the survey with input from IREX and the LMC. It was tested and enumerators completed an 8-hour training session in random sampling, answering questions, privacy and quality control. All surveys were checked for accuracy and data

¹ To calculate the sample size, the research team took the total number of possible respondents in Monrovia (N= 970, 842) and estimated how many respondents would be needed for a 95% confidence level of the findings. The final number, N= 400, is the random sample size that is needed for generalizability of findings from the sample to the general population. The total survey sample (N= 400) was divided into neighborhoods in a method known as Population Proportional to Size (PPS) so that the number of respondents from a neighborhood is related to the size of the neighborhood. Larger neighborhoods will have more people surveyed than smaller neighborhoods.

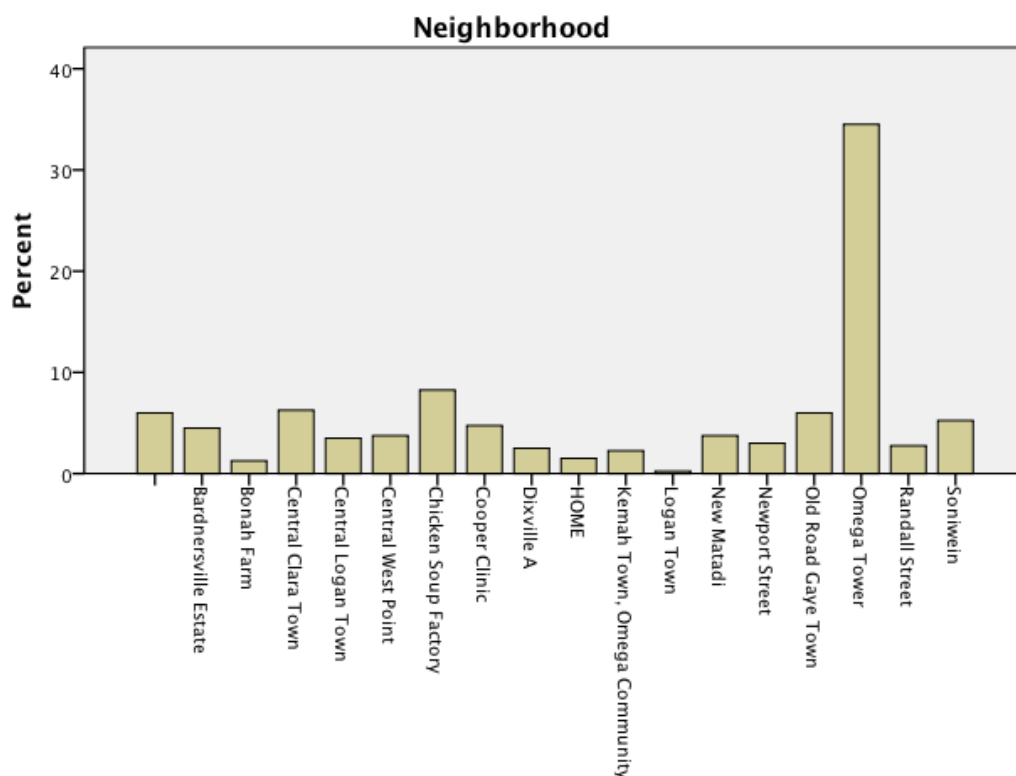
quality. Each survey was entered into Excel and analyzed. The survey findings are reported below.

5.1 Respondent Characteristics

A total of 400 people completed the survey. Fifty-six percent (56%) of respondents were male, 42.5% were female. The age of the survey respondents ranged from 15 to 73, with a mean age of 34. The monthly income of the respondents ranged from LD 200 to a high of LD 144,000. The mode salary was LD 15,000 per month (about USD 200).

The range of dollars per month respondents spent on basic necessities was from LD 100 to LD 63,900. The range of dollars per month respondents spent on entertainment was from LD 50 to LD 20,950. On average, this means that nearly 77% of spending is devoted to basic necessities, while about 24% is devoted to entertainment activities. (Note: The standard exchange rate is LD 70 to USD 1).

Sixty-three percent (63%) of respondents (137 male, 113 female) claimed to make purchasing or buying decisions for the family, while 30% of respondents (71 male, 48 female) said they did not make buying decisions. Dozens of occupations were reported, the most prevalent being student (27%), business (27%), housewife (5.8%), teacher (4.3%), driver (3.3%), farmer (1.5%), engineer (1.3%), and construction worker (1.3%). The other occupations made up less than 1% of the total sample. Over a third (34.5%) of the respondents lived in the Omega Tower neighborhood. The distribution of the remaining neighborhoods can be seen in the table below.

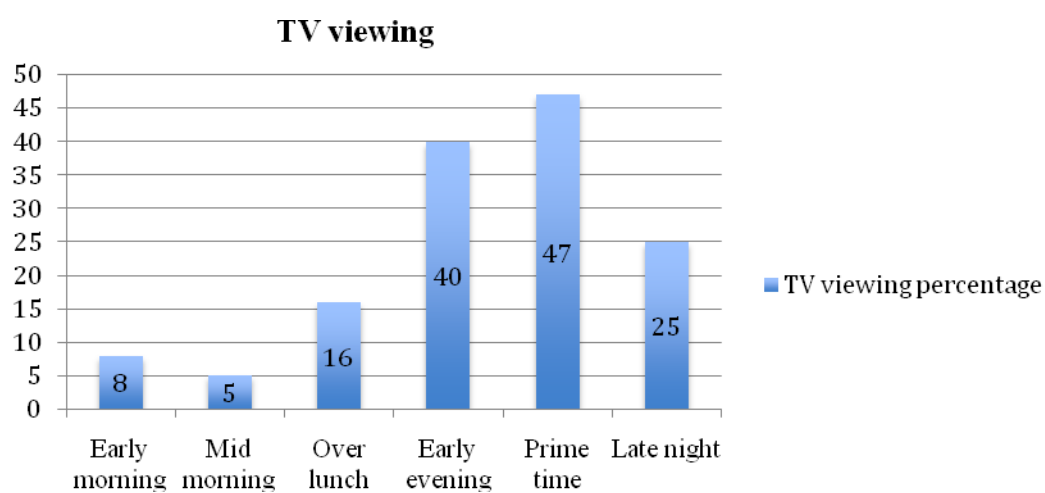


5.2 Television

This section reports data regarding television ownership, channel preference and viewing preferences.

5.2.1 Television ownership and viewing times

Fifty-two percent (52%) of respondents own a television, 48% did not. Only 43% of respondents owned only one television set, however nearly 49% of respondents did not report how many sets they owned. Nearly 79% of respondents claimed to watch television, ranging from 1 to 12 hours per day, with a mean of 2.67 hours a day. The time at which most respondents claimed to watch television was prime time² (47.3%), followed by early evening (40.3%), late night (25.8%), over lunch, (16.5%), early morning (8.8%), and mid morning (5.3%).



5.2.2 Channel/station preference

The television stations viewers watched on a regular basis included: RealTV (57.3%), PowerTV (44.5%), SkyTV (26.5), ClarTV (24%), LN TV (16%), Love (8%), International TV Stations (4%), and Cable Stations (1.8%). Only 24 respondents claimed to watch other channels, 11 of whom regularly watch CNN.

One-third of the respondents cited Real TV as their favorite station (33.6%), followed by Power TV (16.8%), and Clar TV (9.8%). Among respondents who listed other stations as their favorite, Real TV was their second most popular favorite station (17.5%), followed by Power TV (16.8%), and Sky TV (8.8%). Sky TV was the most popular third favorite station (8%), followed by Power TV (7.8%), and Real TV (5.5%).

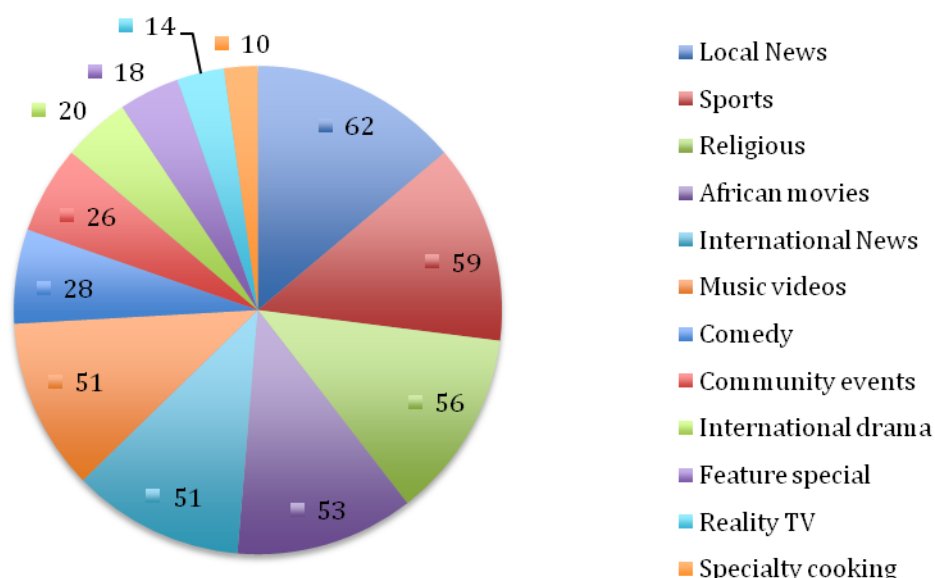
Clearly, the most popular television stations among survey respondents are RealTV, PowerTV, and Sky TV.

5.2.3 Program Preferences

² **Prime time** is the block of [broadcast programming](#) during the middle of the evening for [television programming](#). The term *prime time* is often defined in terms of a fixed time period, for example, from 19:00 to 21:00 or 20:00 to 23:00 (7 p.m. to 9 p.m. or 8 p.m. to 11 p.m.).

Many different favorite television programs were mentioned. Some of the most frequently mentioned include: Local news on Power/Sky/Real TV, African movies on Power/Sky/Real TV, and Crossfire on Real TV.

Local news was identified as the most important programming option, with 62% of respondents saying local news is important to them, followed by sports (59%), religious programs (56%), African or local movies (53.3%), international news (51%), music videos (51%), comedy (28.7%), community event information (26.3%), international drama (20%), feature specials (18.8%), reality television (14%), and specialty cooking (10.8%).



5.2.4 Attention to television advertising

When gender, age and income were analyzed, the research team found that men are statistically more likely to be influenced by advertising than women. The take away for television outlets is that men appear to be more likely to be influenced into buying something after seeing a television advertisement.

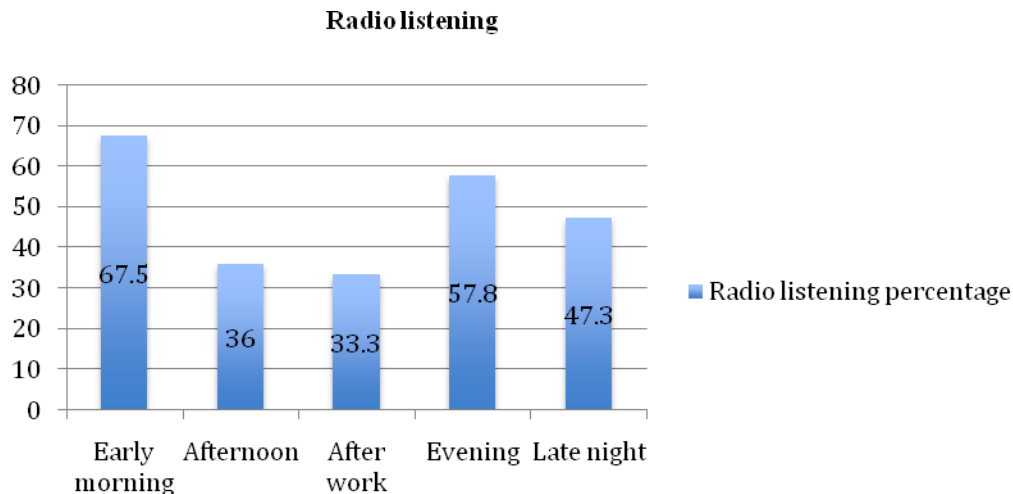
5.3 Radio

This section reports data regarding radio ownership, station preference and listening preferences.

5.3.1 Radio ownership and listening times

Eighty-six percent (86%) of respondents own a radio, and 94.3% percent claimed they listen to the radio. The range of hours per day spent listening to the radio ran from one to 24 hours, with a mean of 5.07 hours per day.

The typical time of day at which respondents listen to the radio was the highest in the early morning, with 67.5% of respondents listening to the radio in the early morning, followed by evening (57.8%), afternoon (36%), after work (33.3%), and late night (47.3%).



5.3.2 Radio program preferences

News bulletins topped the list as a favorite program type with 73.3% of respondents registering that category as their first choice, followed by religious programming (69%), music (68%), call or phone-in shows (57.8%), sports (57.5%), politics (4.5%), talk radio (40.5%), and news magazines (32%).

Dozens of programs were mentioned as those participants “try not to miss.” Some of the most popular included, Coffee Break on UNMIL, Fifty-fifty on Sky FM, Gospel music on many radio stations, call-in shows, local news, and music.

5.3.3 Places where people listen to the radio

Most respondents said they listened to the radio at home (88.3%), followed by in the car (27.5%), the workplace (23.8%), at a neighbor’s home (15.5%), and at school (3.3%).

5.3.4 Favorite stations

Respondents were asked to choose their most favorite radio station. They chose Truth FM(19.5%), followed by ELBC (17.3%), and UNMIL Radio (13%).

When asked to choose their second favorite station, most respondents chose ELBC (12.8%), followed by Truth FM (11.8%), and UNMIL Radio (9%).

The third most favorite station of respondents was Truth FM (7%), followed by ELBC (6.8%), and Sky FM (6.5%). Clearly, Truth FM, UNMIL, and ELBC emerge as leaders in the radio market.

5.3.5 Attention to radio advertising

On average, participants agreed that they always pay attention to advertisements on the radio more than they believed that advertisements influence purchasing decisions.

Interestingly, those in the top third income level were significantly more likely to pay attention to advertisements on the radio than those in the bottom third income level.

Interest in radio advertisements appeared to increase with wealth and age, as the mean agreement for interest in radio advertisements for the wealthiest and oldest third was very high (Mean = 4.21). Conversely, the lowest attention paid to radio advertisements was from the oldest and lowest-income third of respondents (Mean = 3.00). The take away for radio outlets is that wealthier people are more likely to pay attention to advertisements.

Females (Mean = 3.37) were significantly less likely than males (Mean = 3.63) to pay attention to radio. Additionally, when age and income are considered, older, wealthier males are the most likely to pay attention to radio (Mean = 4.60). In other words, older, wealthier men are likely to be the most avid radio listeners.

Income seems to have an effect on the extent to which participants believe advertising affects their purchasing decisions, with those in the upper income brackets being significantly more likely than those in the middle to lower brackets to let radio advertisements affect their purchasing habits. Males in younger and older age brackets are more likely than females to let radio ads influence their purchasing behavior, while females (Mean = 3.82) in middle age brackets are significantly more likely than males (Mean = 3.67) to let ads influence their behavior. In other words, while younger and older men are more likely to be affected by radio ads in making purchasing decisions than their female counterparts, middle-aged women are more likely to be affected by radio ads than their male counterparts. This is important information for media organizations to use to tailor advertisements to these groups.

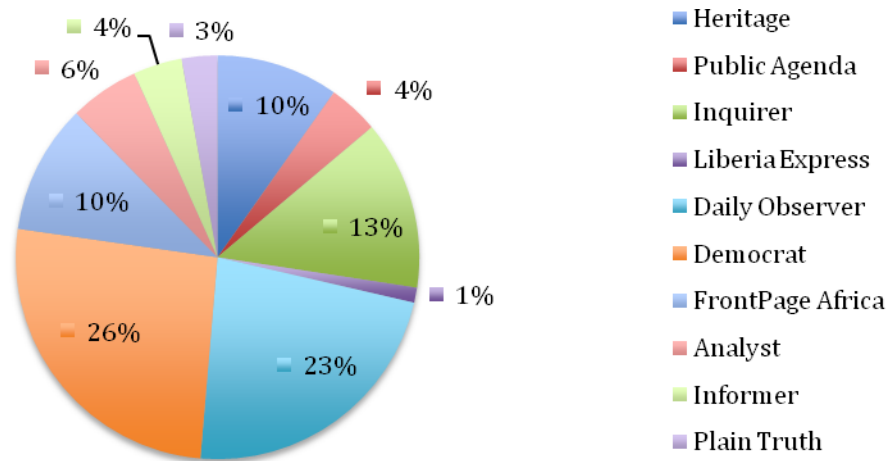
5.4 Newspapers

This section reports data regarding newspaper preference and advertising awareness.

5.4.1 Newspaper readership

Participants were asked what newspapers they read on a weekly basis. The newspaper that participants most frequently read is The Democrat (43%), followed by The Daily Observer (37.8%), The Inquirer (22.5%), Front Page Africa (17.3%), The Analyst (9.3%), The Public Agenda (6.8%), The Informer (6.5%), The Plain Truth (4.8%), and The Liberian Express (2%).

Thus, the market share of weekly newspaper readership is as follows: The Democrat (26%), The Daily Observer (23%), The Inquirer (13%), The Heritage (10%), FrontPage Africa (10%), The Analyst (6%), The Informer (4%), The Public Agenda (4%), Plain Truth (3%), and The Liberia Express (1%).



Participants were also asked to identify their first, second and third favorite newspapers. The Democrat was the most popular first-favorite newspaper (18.8%), followed by the Daily Observer (14.5%), and The Heritage (7.5%). The Democrat was also the most popular second-favorite newspaper (16.5%), followed by the Daily Observer (13%), and the Inquirer (7.2%). The Democrat was again the most popular third-favorite paper (6.3%), followed by the Inquirer (5.8%), and FrontPage Africa (4.8%).

5.4.2 Attention to newspaper advertising

On average, people claimed to pay more attention to advertising in newspapers (Mean = 3.31) than allowed it to influence their purchasing decisions (Mean = 3.09). Age and sex have a significant influence on whether participants pay attention to advertising. Men in every age bracket are more likely to pay attention to ads in the newspaper. This means that, conversely, women of any age are less likely than men to pay attention to newspaper advertisements. Liberian men of all ages are more likely to pay attention to newspaper ads.

Similarly, age and sex also have a significant influence on whether participants were likely to be influenced by ads in the newspaper. Men in every age group are significantly more likely than women to be influenced by ads in the newspaper. Those in the lowest income bracket are significantly less likely to be influenced by ads in the newspaper than those in middle income. This means that both men and women in the lowest income bracket are less likely than those wealthier than them to be influenced by advertising. Newspaper advertising should address middle to high income earners.

5.4.3 Advertising awareness

On average, respondents were unsure as to the extent to which they did or did not look at ads when they needed to make a purchasing decision (Mean = 3.03), men (Mean = 3.24) being significantly more likely than women (Mean = 2.77) to look at ads. Men in the top third income bracket were the most likely to look at ads (Mean = 3.67).

Participants are moderately more likely to consult family and friends about a purchasing decision (Mean = 3.48). Participants neither agreed nor disagreed that the most memorable

advertisements are funny (Mean = 3.03). However, participants were moderately more likely to remember advertisements that are informative (Mean = 3.70). In general, informative ads were considered more memorable than funny ads. This is important information for media organizations to use to develop advertisements that are informative rather than humorous.

6. Media Industry Perceptions of Challenges and Opportunities in Advertising

The second part of the study conducted in-depth interviews with media organizations, businesses that buy advertising space, and government offices that advertise tenders and position vacancies. The IREX team, in conjunction with the LMC, interviewed 14 different organizations: asking questions to business and government about why they select certain media for their advertising placement, and asking media about how they set their rates and how they use research to better develop their advertising revenues.

6.1 Business, Government and NGO Priorities for Advertising

The advertising market in Liberia is in a nascent stage. The business sector is quite small and there is only competition (which generally increases the need for advertising) in two sectors (telecom and banking). Many Liberians do not have the expendable income to buy the types of items that are most often the source of advertising revenue for media in other countries: fast food, cars, beauty products, and consumer products. United Nations organizations, such as UNMIL—the UN Peacekeeping outfit—buy a bulk of the advertising space, but their mission is drawing down and their absence will create a vacuum for television, radio, and newspaper advertising revenue. Government does buy advertisements. Tenders over a certain amount require a public advertisement and open positions are also announced in the media. During the political season for the presidential and legislative elections, there should be increased ad buys.

The interviewees noted that **print** is the preferred medium for announcing tenders and position vacancies. The respondents noted that they prefer to pay for an advertisement in a paper that is “objective and accurate” and has a “wide audience.” Government agencies measure the success of the advertisement by the number of people who inquire or apply for the job or tender.

Radio advertisements should provide businesses and government with inexpensive access to niche publics. However, the radio advertising market is not fully realized yet. One interviewee noted that he liked radio because “it is accountable” because you can hear the ads.

Television advertising is slowly emerging but it is expensive. The small reach of the Monrovia stations plus the competition from much higher quality news and entertainment productions from satellite stations mean that few organizations select television for their ad placement. Businesses can sponsor programs (such as CellCom’s sponsorship of the Truth Breakfast show).

6.2 Issues in Advertising for the Media

The interviews with the media provide greater depth to our understanding of the advertising market in Liberia. The advertising market is quite small and organizations (both business and Liberian government) are often slow to pay. Media organizations report that it takes over 90 days for the Finance Ministry to pay for advertisements. Some businesses refuse to pay or demand additional airtime when the ads developed by the radio and television do not meet their expectations.

The media interviewees recognize the importance of developing attractive advertisements that will provide their clients with real return on their investments. However, the media organizations and outlets have yet to actually develop a tool to measure the impact of their advertising. In an interview question inquiring about return on investment (ROI), not one media interviewee understands the term correctly.

Media advertising requires a trained sales staff that goes out to different types of organizations and shows how targeted advertising with their specific media outlet will provide some type of return. The current model in Liberia has commission-based staff (often women) who service accounts with the larger business organizations. Commission based staff often do not make sales call on smaller organizations or government offices. This may be a missed opportunity.

Advertising rates are several factors. Rates reflect the reality of the high cost of operations. Newspapers gauge how much the costs of paper and printing have increased over the past year and set rates on a yearly basis. Radio and television have fewer tangible pressures and report setting their rates every two years. All media outlets reported that they check out the competitions' rates. Most media outlets publish a set of rates but some complained that their competition (other outlets) undercut the rates and sell advertising space for much less than the rate card. To deal with this form of unfair competition, some media houses have created long term contracts for certain clients. The terms are good for both partners. The media organization or outlet gets a steady stream of reliable income and the business gets a yearlong fixed price contract.

Few if any media or businesses are using any type of reliable audience research when buying advertising space. It is unclear how ads are constructed and if target audiences' demographics, psychographics, or VALs (Values, Attitudes and Lifestyles Survey) are being used.

7. Conclusions about the Media and Advertising Sectors

The two-part study explored both public and organizational perspectives about the media and advertising sectors in Monrovia.

7.1 Media Findings

IREX CSML now has reliable data to better understand the market position of its partners. We know now the most popular types of programming, best times, and most popular media

outlets. The figures and charts above provide a baseline of reach for IREX partners and the data can be used to help each partner to better tailor its content to its audience.

7.2 Advertising Findings

Expendable income is quite low in Liberia (about 24%), and too many people live at or below the poverty line. However, the data shows that the upper half of the population have preferences in media and use media advertisements in their purchase intentions, men more often than women. Print and radio are the dominant media for this group.

The advertising picture that emerges in Liberia shows a man with expendable income paying attention to advertisements on radio and print and reflecting on the advertisements in his buying behaviors. Newspaper advertisements are seen as most credible of all three media types. Middle-aged females are significantly more likely than males to let radio ads influence their behavior. While men of any income are more likely than women to be influenced by television ads, television ads do not appear to be as influential in determining purchasing habits as radio or newspaper ads. Television may be used for more brand identification (such as CellCom's sponsorship of programming) than actual sales.

7.3 Training Opportunities for Media

Before media organizations or outlets can sell more advertising, they need to better develop their own understanding of the power of advertising. They need to learn how to calculate return on investment, create competitive pricing, and be able to show the demographics and priorities of their audiences. They need a more sophisticated marketing strategy that will help them toward sustainability. It is clear that accurate, objective and balanced news programming is a key to maintaining and gaining more advertising since that is what organizations are looking for when they make an ad buy.

There is enormous untapped potential in the business sector for developing advertising revenue. CSML is not responsible for teaching Liberian businesses about the benefits of advertising. However, other USAID implementers are regularly working with the growing business sector. Perhaps IREX could work with those implementers to introduce advertising to small and medium sized businesses.

Finally, something needs to be done about the failure of government offices to pay for advertising. One interviewee suggested that the government agencies that often place advertisement for tenders and vacancies be given vouchers to pay for advertising. Vouchers could be brought to the Ministry of Finance (where everyone agrees the problem lies) and the media organization or outlet could get cash for their services. This voucher system would alleviate the "triple invoicing" that exists today and would ensure that the media get their money in a timely manner.

Appendix A: IREX/LMC Market Research Background Information

Introduction

The study shall be conducted with aim of setting advertising rates and developing products that meet specific audience interest. It is envisaged that the outcome of the research could help outlets propose new projects that respond to audience interests expressed during the market research. In short, the market research would be able to measure the interests and perceptions of the public.

Location of Study

The market research will be conducted in the Greater Monrovia area of Montserrado County. According to the LISGIS (2008) demarcation, Greater Monrovia starts from St. Paul River Bridge on the Bushrod Island, goes unto Paynesville but not including Mount Barclay and Johnsonville, as well as Duarzon. In other words, Greater Monrovia includes the actual municipal limits in conjunction with its suburbs.

Sample Size Selection³

Since we already know the population of Greater Monrovia 970,824

$$n = \frac{N}{1 + N(e)^2}$$

Where n= the sample size,

N= Total households =970,824

e = standard error of the study. For the purpose of convenience a

Standard error of 5% or 0.05 will be used.

Hence

$$n = \frac{970,824}{1 + 970,824(0.05)^2}$$

$$n = 399.83$$

$$n \approx 400 \text{ persons}$$

Sampling Technique

The research will cover selected clusters in the Greater Monrovia vicinity. The clusters were obtained from a list of 12 zones obtained from LISGIS geographic mapping exercise conducted immediately before the 2008 census. The estimates of the population of the various zones are results of the de jure quick count of the population; hence, there are observable underestimates, However, the estimates give a rough outlook of the population within each zone. Therefore they will be used to determine the population of each zone to

³ This is the standard formula for estimating an appropriate sample size. The formula takes the total number of possible respondents in a population (N= 970, 842) (top number) and divides 1 plus that population (970, 842) by the population (970, 824) times the squared acceptable error (5%) The final number, N= 400, is the random sample size that is needed for generalizability of findings from the sample to the general population. A total of 400 randomly selected respondents is the target for the survey. The total survey sample (N= 400) will be divided into neighborhoods in a method known as Population Proportional to Size (PPS) so that the number of respondents from a neighborhood is related to the size of the neighborhood. Larger neighborhoods will have more people surveyed than smaller neighborhoods.

be selected using the Population Proportional to Size (PPS) sampling procedure. Note: the clusters will be selected based upon its population within the zone.

Zone	Population	pi	pi*400	Selected Community
1100	245327	0.37	149	Kemah Town/Omega
1200	64859	0.10	39	Chicken Soup Factory
1400	29057	0.04	18	Barnersville Estate
1600	17198	0.03	10	Dixville A
200	46234	0.07	28	Central Logan Town
300	45835	0.07	28	Central Clara Town
400	24368	0.04	15	Central West Point
500	38138	0.06	23	Randall/Newport Streets
600	34352	0.05	21	Soniwein
700	35554	0.05	22	Cooper Clinic 12th Street
800	39290	0.06	24	New Matadi
900	37978	0.06	23	Old Road Gaye Town Community
	658190		400	

Appendix B: List of Survey Enumerators

Emmanuel Randall
Valorie Coleman
Godson Daniel Gayflor
Paul Tamba
Ignatius Abedu-Bentsi
Raheim Smallwood
Ilan Ricks
Micheal Chea
Laura Golakeh
Promise Dennis
Priscillia Quiah
Joseph Daniels
Joseph N. Sonpon
Charles Tweh
Bonah Lakey
Emmanuel Tolbert
Lewis Geelar
Emmanuel Togbah
Cedela Sawee
Sylvester Boakai

Appendix C: Final Liberia Media Survey

Name of Interviewer _____

Location of survey _____

Survey number _____

Read Aloud: My name is _____ and I am part of a research team conducting a survey about Monrovia residents' media viewing patterns. Would you take 15 minutes to answer some questions about your newspaper, television and radio interests? Your answers are anonymous and they will help the Liberian media and local businesses to better understand your needs.

Interviewer Read Aloud: The first questions inquire about television viewing. We want to know what you watch, when you watch, and what you like on television.

1. Television Viewing

1.1 Do you have a television? Yes = 2 No = 1

1.2 Do you watch television? Yes = 2 No = 1

1.3 How many television sets do you have in your home? _____

Interviewer: write the number of television sets on the line (0-10)

2. For your television viewing, which stations do you watch on a regular basis? **Interviewer: Circle all of their answers**

2.1 Clar TV

2.2 Power TV

2.3 Real TV

2.4 Love

2.5 Sky

2.6 LN TV

2.7 International stations

2.8 Cable Stations

2.9 Other _____ (write name)

3. Which are your three favorite television stations to watch? **Interviewer: Write the names of their first, second and third most favorite television stations.**

3.1 1st favorite _____

3.2 2nd favorite _____

3.3 3rd favorite _____

4. How many hours do you spend per day watching television? _____ hours of television.

Interviewer: write the number of whole hours on the line (0-24) Please round up minutes to the next hour. (45 minutes = 1 hour, 1.5 hours = 2 hours).

5. On a typical day, at what time (s) do you watch TV programs?

Interviewer: please read the title of each block and place X on the lines of all that apply.

5.1) _____ early morning (4-8)

5.2) _____ mid morning (9-11)

5.3) _____ over lunch or in the afternoon (12 noon -4 p.m.)

- 5.4) _____ early evening (5 – 8 p.m.)
 5.5) _____ prime time (8-10 p.m.)
 5.6) _____ late night (10 p.m. & beyond)

6. We all have our favorite TV programs. Which programs do you try NOT TO MISS? **Interviewer: Write the name of their favorite programs and the station that it airs on the two lines. If they do not know the exact station, then write DNK (does not know).**

- 6.1) program name _____ on _____
 6.2) program name _____ on _____
 6.3) program name _____ on _____

7. What television programming options are important to you? I am going to read a list and you can answer yes or no telling me if this type of programming is important to you.

Interviewer: place an X on the line of all that are identified as important

- 7.1 _____ Is Sports programming important to you?
 7.2 _____ Are Music Videos important to you?
 7.3 _____ Is Local News and Information important to you?
 7.4 _____ Is Community Events Information important to you?
 7.5 _____ Are Special Feature such as documentaries important to you?
 7.6 _____ Is International Drama important to you?
 7.7 _____ Is Comedy important to you?
 7.8 _____ Is Reality Show important to you?
 7.9 _____ Is International News (BBC, CNN) important to you?
 7.10 _____ Is Specialty programming such as cooking, travel or leisure important to you?
 7.11 _____ Are African or local movies or dramas important to you?
 7.12 _____ Is Religious Programming important to you?

7.13 _____ Other, state? (write name)

8. How much do you agree with this statement: I always pay attention to the advertisements on television. **Interviewer: please read each of the categories below and then circle the answer.**

5	4	3	2	1
Strongly agree	agree	neither agree nor disagree	disagree	Strongly disagree

9. How much do you agree with this statement: Advertisements on television influence my purchasing decisions. **Interviewer: please read each of the categories below and then circle the answer.**

5	4	3	2	1
Strongly agree	agree	neither agree nor disagree	disagree	Strongly disagree

The next section of the survey asks you about radio listening.

10.1 Do you have a radio? Yes **No** Yes = 2 No = 1

10. 2 Do you listen to radio? Yes **No** Yes = 2 No = 1

10.3 On a typical day, approximately how many hours do you listen to the radio? _____ hours

Interviewer: write the number of whole hours on the line (0-24) Please round up minutes to the next hour. (45 minutes = 1 hour, 1.5 hours = 2 hours).

11. On a typical day, at what time (s) do you listen to the radio?

Interviewer: please read each block and the times listed next to it and place X on the line of all that apply.

- 11.1 _____ morning (4-11)
- 11.2 _____ afternoon including lunch time (12-4)
- 11.3 _____ after work (5-7)
- 11.4 _____ evening (8-10)
- 11.5 _____ late night (10 p.m. and beyond)

12. I am going to read a list of radio programs. After each type of radio program, please tell me if it is one of your favorite radio programming by saying yes or no. **Interviewer: Put an X next to the ones with a YES as a favorite format.**

- 12.1 _____ News Bulletins are a favorite program (yes, no)
- 12.2 _____ News Magazines are a favorite program (yes, no)
- 12.3 _____ Talk (Straight Interviews) are a favorite program
- 12.4 _____ Call or Phone in shows are a favorite program
- 12.5 _____ Sports are a favorite program
- 12.6 _____ Politics is a favorite program
- 12.7 _____ Music is a favorite program
- 12.8 _____ Religious Programming is a favorite program
- 12.9 OTHER Please write name _____

13. Where do you listen to the radio? **Interviewer: read aloud and circle appropriate answer.**

- 13.1 _____ at home ? Yes = 2 No = 1
- 13.2 _____ at your workplace? Yes = 2 No = 1
- 13.3 _____ At school? Yes = 2 No = 1
- 13.4 _____ At my neighbor's house? Yes = 2 No = 1
- 13.5 _____ In a car? Yes = 2 No = 1
- 13.6 _____ Other (write in) Yes = 2 No = 1

14. Which are your three favorite stations to listen to? **Interviewer: Write the names of their first, second and third most favorite stations.**

- 14.1 My (most) 1st favorite radio station _____
- 14.2 My (second most) favorite radio station (2nd) _____
- 14.3 My (third most) favorite radio station (3rd) _____

15. I try never to miss the following programs on radio. **Interviewer: Write the name of their favorite program and the radio station that it airs on.**

- 15.1) program name _____ on _____
- 15.2) program name _____ on _____
- 15.3) program name _____ on _____

Interviewer: please read each of the categories below and then circle the answer.

16. How much do you agree with this statement: I always pay attention to the advertisements on radio. **Interviewer: please read each of the categories below and then circle the answer.**
- | | | | | |
|----------------|-------|----------------------------|----------|-------------------|
| 5 | 4 | 3 | 2 | 1 |
| Strongly agree | agree | neither agree nor disagree | disagree | Strongly disagree |

17. How much do you agree with this statement: The advertisements on radio influence my purchasing decisions. **Interviewer: please read each of the categories below and then circle the answer.**

5	4	3	2	1
Strongly agree	agree	neither agree nor disagree	disagree	Strongly disagree

Newspaper

The next section asks about newspaper readership

18. We are interested in which newspapers you read. On a WEEKLY basis, which newspapers do you read? **Interviewer: Read the names and ask if they read the paper. If they say yes, circle the name.**

- 18.1 The Heritage Newspaper
- 18.2 The Public Agenda Newspaper
- 18.3 The Inquirer Newspaper
- 18.4 The Liberia Express Newspaper
- 18.5 The Daily Observer Newspaper
- 18.6 The Democrat Newspaper
- 18.7 FrontPage Africa Newspaper
- 18.8 The Analyst Newspaper
- 18.9 The Informer Newspaper
- 18.10 The Plain Truth Newspaper
- 18.11 Other (Specify or state) _____

19. Which are your three favorite newspapers to read? **Interviewer: Write the names of their first, second and third most favorite newspapers. They can include daily and weekly papers.**

- 19.1 1st _____
- 19.2 2nd _____
- 19.3 3rd _____

Interviewer: please read each of the categories below and then circle the answer.

20. How much do you agree with this statement: I always read the advertisements in the newspaper. **Interviewer: please read each of the categories below and then circle the answer.**

5	4	3	2	1
Strongly agree	agree	neither agree nor disagree	disagree	Strongly disagree

21. How much do you agree with this statement: The advertisements in the newspaper influence my purchasing decisions. **Interviewer: please read each of the categories below and then circle the answer.**

5	4	3	2	1
Strongly agree	agree	neither agree nor disagree	disagree	Strongly disagree

This section of the survey is about Advertising Awareness

Please state how strongly you agree with the following statements: **Interviewer: please read each of the categories below and then circle the answer.**

22. How much do you agree with this statement: When I need to make a purchasing (buying) decision, I look at advertisements.

5	4	3	2	1
Strongly agree	agree	neither agree nor disagree	disagree	Strongly disagree

23. How much do you agree with this statement: When I need to make a purchasing (buying) decision, I ask my family and or friends for advice.

5	4	3	2	1
Strongly agree	agree	neither agree nor disagree	disagree	Strongly disagree

24. How much do you agree with this statement: The most memorable advertisements are funny.

5	4	3	2	1
Strongly agree	agree	neither agree nor disagree	disagree	Strongly disagree

25. How much do you agree with this statement: The most memorable advertisements are informative.

5	4	3	2	1
Strongly agree	agree	neither agree nor disagree	disagree	Strongly disagree

This last section is about general demographic questions

26. Sex of Respondent: Circle Male = 2 Female = 1

27. What is your Age _____ (write in)

28. What is your Occupation _____ (write in)

29. What is your Income _____ Liberian Dollars per month (write in or if they refuse write REFUSED)

30. Are you the person in the family who makes purchasing (buying) decisions. Yes = 2 No = 1

31. How much do you spend approximately _____ Liberian Dollars per month on the basic necessities including food, shelter, clothes, and transportation? **Interviewer: please write amount of money in Liberian dollars if provided. If they refuse to answer, right REFUSE**

32. How much do you spend approximately _____ Liberian Dollars per month on entertainment and other areas of choice? **Interviewer: please write amount of money in Liberian dollars**

33. Home neighborhood _____ (write in)

Thank you for taking time to answer these questions. Your answers are anonymous and they will help the Liberian media and local businesses to better understand your needs. Have a great day.

Appendix D: List of Interviewees

In depth interviews targeted list of media organizations, businesses that buy advertising space, and government offices that advertise tenders and position vacancies

#	Organization	Filled-out Questionnaire Yes/No
1	LUX FM	Yes
2	The Inquirer	Yes
3	Heritage	Yes
4	Liberian Express	No
5	Public Agenda	Yes
6	LWDR	Yes
7	RCI	Yes
8	Veritas	Yes
9	Aqua Life	Yes
10	Cemenco	Yes
11	Cellcom	No
12	Lonestar	Yes
13	Comium	No
14	Libercell	No
15	Mittal Steel	No
16	BRE	No
17	Ministry of Finance	No
18	Ministry of Education	Yes
19	Ministry of Justice	No
20	Ministry of Commerce	No
21	LACC	No
22	PPCC	Yes
23	Civil Service Agency	Yes
24	UNESCO	Yes
25	UNMIL	No
26	UNDP	No
27	UNICEF	No

Appendix E: Interview Questions

Questions for Media Organizations

We are conducting informational interviews with different businesses to learn more about how they buy advertising. This interview will only last about 30 minutes and your answers will be used to help IREX better understand the advertising market in Monrovia. Your answers will be combined with other organizations. No one will make a sales call to you based on this information. It is only for our general understanding of the advertising market in Monrovia.

- 1) How do you currently sell advertising?
 - a. Paid full time staff
 - b. Commission based staff
 - c. Long term contracts
 - d. Other (Please explain)
- 2) How do you set advertising rates?
 - a. How often revised?
 - b. Which factors influence rates?
- 3) Approximately, what percentage of revenue comes from advertising?
 - a. What are other sources of income?
- 4) How do you measure return on advertising?
- 5) How much do you bill annually for advertising?
 - a. Do you sometimes use barter in lieu of advertising?
 - b. Who are your major clients? **(If they do not answer, ask, what types of businesses buy the most advertising?)**
- 6) Who is your target market for your outlet?
 - a. Do you conduct any research to learn about their preferences?
 - b. What information would help you to better target your market?
- 7) How do you plan your programming/content?
 - a. Do you consider advertisers' needs?
 - b. Do you consider your audience's interests?
 - c. Do you consider past audience research in your decision-making?
- 8) Can you tell me about problems in dealing with competing media organizations?
- 9) Can you tell me about problems in dealing with clients around advertising?
 - a. Failure to pay?
 - b. Unhappy with final advertisement?
- 10) What types of information do you need to make better programming/content decisions?
- 11) Is there anything else that you would like to tell me about the businesses, institutions or government offices buying advertising from your outlet?

Thank you for your time. Your answers will be aggregated with other media organizations' answers and will help target IREX training.

Questions for Government

We are conducting informational interviews with different government to learn more about how they buy advertising. This interview will only last about 30 minutes and your answers will be used to help IREX better understand the advertising market in Monrovia. Your answers will be combined with other organizations. No one will make a sales call to you based on this information. It is only for our general understanding of the advertising market in Monrovia.

- 1) Please tell me why you buy advertisements for your government office?
 - a. Vacancies

- b. Tenders (or public procurement)
 - c. Other (please write in)
- 2) What factors do you consider when making a decision to buy advertising on the following Monrovia-based media outlets? Why? Please explain your answers.
 - a. Factor for choosing television:
 - b. Factor for choosing radio:
 - c. Factor for choosing print:
- 3) How do you know if your advertising is effective?
- 4) What is the process that your office follows for paying for advertising?
 - a. How do you get permission?
 - b. How do you request the payment?
 - c. What problems occur?
- 5) What do you think can be done to make the payment to media more efficient?
- 6) Approximately how much do you spend annually on advertising per medium? An estimate is fine. Please write answers in Liberian Dollars. **(if they have trouble identifying an amount, offer them suggestions such as 1000 LD per year, 5000 LD, 10,000 LD)**
 - a. Television: _____ has this amount increased or decreased over the last year?
 - b. Radio _____ has this amount increased or decreased over the last year?
 - c. Print _____ has this amount increased or decreased over the last year.
- 7) Is there anything else that you would like to tell me about government offices buying advertising in Monrovia?

Questions for Businesses

We are conducting informational interviews with different businesses to learn more about how they buy advertising. This interview will only last about 30 minutes and your answers will be used to help IREX better understand the advertising market in Monrovia. Your answers will be combined with other organizations. No one will make a sales call to you based on this information. It is only for our general understanding of the advertising market in Monrovia.

- 1) What factors do you consider when making a decision to buy advertising on the following Monrovia-based media outlets. Why? Please explain your answers:
 - a. Television :
 - b. Radio :
 - c. Print :
 Why? Please explain your answers.
- 2) How do you measure your financial return on advertising?
 - a. Would you like new ways to measure your advertising effectiveness?
- 3) What type of media brings you more return for your advertising dollar?
 - a. Television
 - b. Radio
 - c. Print/Newspaper
 Why? Please explain your answers.
- 4) Approximately how much do you spend annually on advertising per medium? An estimate is fine. Please write answers in Liberian Dollars. **(if they have trouble identifying an amount, offer them suggestions such as 1000 LD per year, 5000 LD, 10,000 LD)**
 - a. Television: _____ has this amount increased or decreased over the last year?
 - b. Radio _____ has this amount increased or decreased over the last year?
 - c. Print _____ has this amount increased or decreased over the last year?
- 5) Who is your target audience that you want to reach?
 - a. How do you reach them (besides paying for advertising)?
 - b. Do you conduct any research to learn their preferences? Yes No

- c. What information would help you to better target your market?
- 6) What type of media organization do you prefer to deal with when it comes to buying advertising?
- a. Locally owned
 - b. International publication or broadcast
 - c. Outlets that make the ads for me
 - d. Other
- Why? Please explain your answers.

Thank you for your time. Is there anything else that you would like to tell me about advertising in Monrovia?

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