

Terms of Reference

Audience Landscape Study: Kenya, Tanzania and Uganda

AGILE Programme: East Africa

1. Background

Thomson Media, under the Advancing Global Innovation and Learning Effectively to Build Resilience in Independent Media (AGILE) Programme's Workstream 3: *Sustainable Business Models*, aims to strengthen the resilience, audience engagement capacity, and long-term sustainability of independent media organisations operating in challenging information environments.

To ensure that project activities are grounded in the audience and commercial realities of programme countries, Thomson Media is commissioning a focused audience landscape study covering Kenya, Tanzania and Uganda. The study will draw on existing evidence and targeted primary research to provide practical insights into audience behaviours, information needs, trusted sources, digital media habits, and opportunities for effective public-interest content and engagement across the three countries that can drive more sustainable business models built around stronger audience connections.

The study will provide a foundation for the remaining activities under the project, helping ensure that training, mentoring, content production, partner engagement and audience-facing activities are informed by real-world information behaviours and needs. It will also contribute to wider learning on audience engagement, trust, information access and information integrity in East Africa.

2. Purpose of the Assignment

The purpose of this assignment is to produce one clear, practical and evidence-informed audience landscape study covering Kenya, Tanzania and Uganda.

The primary purpose of the study is to generate findings that can inform the design and delivery of the remaining AGILE Africa activities. Secondly, the study will serve as a useful public resource for media practitioners, civil society actors, researchers, donors and other stakeholders working on information integrity, public-interest media and audience engagement in East Africa.

The study should help Thomson Media and its partners understand:

- How different audience groups access, consume, assess and share information across the three countries.
- Which media platforms, content formats and messengers are most trusted, and why.
- What information gaps or needs exist at community, national and regional levels.
- Where opportunities exist for media to develop audience-supported sustainability models.
- What practical support independent media organisations require to strengthen audience relationships and revenue generation.
- What similarities and differences exist between Kenya, Tanzania and Uganda.
- What opportunities exist for media, content creators, civil society and other public-interest actors to produce more relevant, trusted and responsible content.
- How the findings can inform practical, locally grounded and audience-responsive interventions under the AGILE Africa programme.

3. Scope of Work

Researchers will conduct one focused audience landscape study covering Kenya, Tanzania and Uganda. The study should provide a comparative understanding of audience behaviours, information needs and the wider information ecosystem across the three countries, combining a regional perspective with concise country-level analysis. The study should be proportionate, practical and evidence-informed. It should draw on existing research and targeted primary data collection to address defined research questions.

At minimum, the study should cover the following thematic areas:

- **Audience information habits.** Patterns of access, consumption, sharing and engagement with information across different audience groups.
- **Trust and credibility.** Levels of trust in different media sources and the factors shaping perceptions of credibility.
- **Digital platforms and content formats.** Use of social media, messaging platforms and other channels, and preferences for different types of content.
- **Information needs and gaps.** Priority topics, unmet information needs and areas where audiences feel under-informed or misinformed.
- **Revenue and sustainability opportunities.** Audience behaviours and attitudes relevant to financial support for independent media and content.
- **Media and information ecosystem.** Key actors, content creators, networks and initiatives shaping the flow of information.
- **Organisational capacity and audience data.** How media organisations understand and use audience insights.
- **Accessibility, inclusion and relevance.** How access, engagement and trust vary across different population groups, including marginalised or underserved audiences.

A detailed set of research questions under each of these thematic areas is provided in Section 5.

The assignment is expected to be conducted primarily remotely, with limited travel only where clearly justified.

4. Research Questions

The study should provide answers to the following research questions. For all questions, the extent of variance across the three countries should be a key dimension that is explored.

Audience information habits

- What are the preferred sources of news and public-interest information?
- What are current audience size and segments for television, radio, print, online media, social media and messaging platforms?
- What are the key demographics that segment audiences within each country, i.e. urban, peri-urban and rural, age, ethnicity, gender, language and other relevant demographic categories?
- What is the role of family networks, peer groups, religious leaders, community leaders, influencers and informal information intermediaries in shaping information flows.

Trust and credibility:

- What is the variance in trust ascribed by audiences to mainstream media, community media, digital platforms, content creators, public institutions and civil society actors.
- What are the key factors influencing audience's views on perceived credibility of media sources, particularly the levels of trust in journalists and media organisations.

- Barriers to trust, including perceived bias, commercial interests, political affiliation, safety concerns or previous experiences of misinformation.
- What are the key trends in information manipulation and what is its impact on engagement on how audiences engage with media?

Digital platforms and content formats

- What is the size and profile of audiences for social media applications, Facebook, TikTok, YouTube, WhatsApp, X, Instagram and other locally relevant channels?
- What is the role of messaging apps and private networks in information circulation.
- What are the preferred content formats, including short video, explainers, live broadcasts, podcasts, graphics, articles, community radio, SMS or offline formats?
- To what extent do audiences engage with, comment on, share or challenge information online?

Information needs and gaps

- What are the topics where audiences feel under-informed or misinformed?
- What are the key gaps in public-interest reporting and accessible explanatory content.
- What are community-level information needs, including those relating to governance, public services, climate, health, economy, gender, youth issues and civic participation?
- What are the key opportunities for media and content creators to better serve audience needs?

Revenue and sustainability opportunities

- Which audience segments may be willing to support independent media financially, and for what content?
- What forms of audience support appear most viable (subscription models etc)?
- What lessons can be drawn from Kenya's comparatively more developed digital media economy?
- What barriers prevent audiences from financially supporting independent journalism?

Media and content ecosystem

The study should provide a concise overview of the wider information ecosystem in each country, while drawing out regional patterns. This should include:

- Key media actors and platforms.
- Influential content creators and digital communities.
- Relevant civil society, factchecking or information integrity initiatives.
- Existing audience engagement approaches.
- Gaps in responsible content production and distribution.
- Opportunities for collaboration under the AGILE Africa programme.

Organisational capacity related to audiences and audience data

- What audience data and insights do independent media organisations currently collect?
- How are media organisations using audience analytics and engagement data?
- What practical support does independent media organisations require to strengthen audience strategy, loyalty, and monetisation?

Accessibility, inclusion and relevance

The study should consider how information access and trust are shaped by inclusion and accessibility factors. This should include attention to:

- Language and literacy barriers.
- Accessibility for persons with disabilities, where evidence is available.
- Gendered patterns of information access and participation.
- Rural and underserved audiences.
- Youth audiences and digital behaviours.
- The relevance of content to everyday needs and lived realities.
- The extent to which communities are represented in the content that claims to serve them.

5. Methodology

The study should adopt a mixed-methods approach designed to fill evidence gaps rather than duplicate existing media ecosystem research.

This should combine:

- Structured desk review of data and evidence across the three countries, that are relevant to the research questions, and which have been published in the past 3 years;
- Key Informant Interviews (KIIs), either virtual and/or in person
- Other methods or approaches suggested by researchers that help to answer the research questions.

Desk review of existing evidence

The researchers should conduct a structured review of existing data and research before primary research begins. This should include relevant AGILE materials and other available research on media consumption, audience behaviour, information access, trust, misinformation, disinformation and information integrity in Kenya, Tanzania and Uganda.

The desk review should be used to refine the research questions, avoid duplication of previous studies, and ensure that new data collection focuses on areas where additional evidence is needed. This should give primary focus to data and evidence published over the past 3 years.

As part of the inception phase, the researchers should prepare a brief evidence review and gap analysis in relation to the research questions, setting out:

- What is already known from existing research.
- Which findings can be incorporated into the study.
- Which findings require light validation or updating.
- Where new primary research is needed.
- Areas that are outside the scope of the assignment.
- How existing evidence will inform the sampling approach and research tools.

Key informant interviews

The content of interviews should prioritise addressing the key gaps in evidence identified via desk review in relation to the study research questions. Researchers should conduct targeted interviews with relevant stakeholders across the three countries. These may include:

- Journalists and editors.
- Media managers.
- Content creators and influencers.
- Fact-checkers and verification specialists.
- Civil society organisations.
- Digital rights or media freedom actors.

- Community leaders or local information intermediaries.
- Youth, gender or community-based organisations.
- Researchers or policy experts.
- Other relevant actors identified during the inception phase.

The final number of interviews and a list of interviewees should be proposed by researchers and agreed during inception, along with the discussion guides to be used with each group. The sample should be realistic within the timeframe and should prioritise stakeholders who can provide comparative, practical and country-specific insight.

Additional methods to consider

In addition to the core desk review and key informant interviews, researchers may propose other relevant and proportionate methods to address specific research questions and evidence gaps, subject to available budget, timeframe and feasibility.

Possible approaches may include:

- targeted audience consultations;
- remote or phone-based interviews;
- short online or mobile surveys;
- audience diaries;
- digital ethnography or social listening;
- and light-touch digital or platform analysis.

These methods should complement existing evidence rather than duplicate it and should be clearly justified in relation to the study objectives.

6. Ethical and Safety Considerations

The assignment must be conducted in line with ethical research standards and do-no-harm principles.

Researchers will be expected to:

- Obtain informed consent from all research participants, with an understanding that anonymised results will be shared in public domains.
- Protect the anonymity and confidentiality of participants.
- Avoid collecting unnecessary personal or sensitive data.
- Ensure that participation is voluntary.
- Consider risks linked to political expression, online behaviour, marginalised identities or sensitive topics.
- Ensure that data storage and handling are secure.
- Avoid exposing participants, researchers or partners to unnecessary risk.
- Flag any ethical, safeguarding or safety concerns to Thomson Media promptly.

Where discussions include misinformation, political content, identity-based narratives or other sensitive issues, researchers should use careful facilitation methods and avoid prompting participants to disclose information that could put them at risk.

7. Deliverables

Researchers will be expected to produce the following deliverables.

Deliverable 1: Inception report and workplan. A concise inception report setting out:

- Proposed methodology.

- Refined research questions.
- Analytical framework.
- Sampling approach across Kenya, Tanzania and Uganda.
- Workplan.
- Ethical and risk considerations.
- Proposed structure for the final study.
- Brief evidence review and gap analysis.
- Explanation of how the study will build on available evidence and avoid duplication.

Deliverable 2: Evidence review and gap mapping. A concise analytical review of existing evidence across Kenya, Tanzania, and Uganda covering published data and research from the last 3 years.

The report should:

- synthesise existing evidence rather than duplicate it;
- identify where evidence is strong, weak, or contradictory
- and highlight priority knowledge gaps for primary research.

Deliverable 3: Research tools. Draft research tools for review by Thomson Media. Namely interview guides for KIIs but also tools relevant to other methods proposed.

Deliverable 4: Draft audience landscape study. One draft audience landscape study covering Kenya, Tanzania and Uganda.

The draft should include country-specific sections and comparative analysis across the three countries. Thomson Media will review the draft and provide consolidated feedback.

Deliverable 5: Final audience landscape study. One final audience landscape study covering Kenya, Tanzania and Uganda. The report should be structured around the following sections:

- Executive summary.
- Introduction and background.
- Methodology and limitations.
- Key Findings
- Implications for AGILE implementation in East Africa
- Recommendations.

Final report structure will be agreed with Thomson Media prior to submission of a first draft.

Deliverable 6: Summary presentation

A concise slide deck and presentation to Thomson Media and relevant partners summarising the main findings and recommendations.

The presentation should include:

- Key findings from Kenya, Tanzania and Uganda.
- Comparative regional insights.
- Immediate implications for AGILE Africa activities.
- Recommendations on audience engagement, content formats, trusted channels and partner approaches.
- Suggested areas for further research or validation.

8. Timeline

The research is expected to take place over a three-month period, between July and September 2026.

An indicative timeline is set out below. The final workplan will be agreed with the selected consultant or research team during the contracting and inception phase.

Phase	Activity	Indicative timing
Phase 1	Contracting and inception meeting	Late June / early July 2026
Phase 2	Inception note, evidence review and research tools	July 2026
Phase 3	Desk research and stakeholder mapping	July 2026
Phase 4	Targeted primary research in Kenya, Tanzania and Uganda	July to August 2026
Phase 5	Analysis and draft audience landscape study	August to early September 2026
Phase 6	Review and revision	September 2026
Phase 7	Final report and presentation	Late September 2026

9. Management and Coordination

The consultant or research team will report to Thomson's Head of Programmes – Middle East & Africa. Researchers will be expected to:

- Attend an inception meeting.
- Provide regular progress updates.
- Share emerging findings where useful for project planning.
- Participate in feedback meetings on draft deliverables.
- Incorporate reasonable feedback from Thomson Media.
- Deliver final outputs in agreed formats and within the agreed timeline.

Thomson Media will provide relevant background documents, project information and introductions to selected stakeholders where appropriate.

10. Required Expertise

The researchers should demonstrate:

- Strong experience conducting audience research, media research or information ecosystem analysis.
- Knowledge of media, digital platforms and information integrity issues in East Africa.
- Experience working in Kenya, Tanzania and/or Uganda.
- Ability to conduct qualitative research and synthesise existing evidence.
- Understanding of misinformation, disinformation, digital media behaviour and public-interest journalism.
- Strong analytical and report-writing skills.
- Experience producing research for public dissemination.
- Experience working with donors, international NGOs, media development organisations or civil society actors.
- Ability to manage ethical and safety considerations in sensitive research.

- Fluency in English.
- Knowledge of Swahili and other relevant local languages would be an advantage.
- Ability to work with local researchers, facilitators or enumerators where needed.

Thomson Media welcomes applications from individual consultants, small research teams or consortia with relevant country expertise. Applicants should demonstrate how they will ensure appropriate country coverage, including through local researchers, facilitators or enumerators where appropriate.

11. Proposal Requirements

Interested researchers should submit:

- A technical proposal outlining their understanding of the assignment and proposed methodology.
- A financial proposal, including consultant fees, research costs, data collection and any other relevant expenses.
- A proposed workplan.
- CVs of key team members.
- Examples of relevant previous work.
- A short note on ethical, safeguarding and data protection procedures.
- Confirmation of availability.

Applications should be submitted to mea.recruitment@thomsonfoundation.org .

12. Assessment Criteria

Applications will be assessed against the following criteria:

Criteria	Weighting
Understanding of the assignment and proposed approach	25%
Relevant experience in audience, media or information ecosystem research	20%
Knowledge of Kenya, Tanzania and Uganda	15%
Quality and feasibility of methodology	25%
Value for money	10%
Ethical, safeguarding and data protection approach	5%