

# REACHING DIASPORA THROUGH MOBILE RADIO

STUDY OF SOMALI AND HAITIAN REMITTANCE HABITS  
REVEALS INNOVATIVE SURVEY TECHNOLOGY

JULY 2014



# Reaching Diaspora Through Mobile Radio

## Study of Somali and Haitian Remittance Habits Reveals Innovative Survey Technology

Presented by AudioNow  
With the support of  
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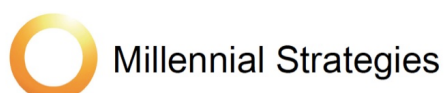
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#### About AudioNow

AudioNow, based in Washington, DC, is the leading call-to-listen platform in the world. With broadcast partners on every continent, AudioNow extends the reach of radio by connecting mobile listeners to their favorite radio stations through a simple telephone call. The AudioNow platform uses proprietary “HD” voice design and patent-pending technology that serves all mobile platforms. AudioNow has more than 2,000 broadcast partners, including global leaders such as the United Nations, BBC, RFI, Voice of America, Entravision, C-SPAN and IMG College. In 2013 AudioNow delivered 2 billion listening minutes to its broadcast partners and connected users 84 million times to its platform.

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## INTRODUCTION:

**July 31, 2014** – AudioNow, – a call-to-listen mobile platform, – was created, in part, to connect diaspora communities to their countries of origin through radio programming, and could potentially serve as an effective research proxy into this increasingly influential marketplace.

Currently, as of July 31, 2014, “the platform” (AudioNow) partners with more than 2,000 stations, and serves as a bridge for more than 1.5 million “unique” callers, who have consumed 2 billion listener minutes over the course of 84 million calls in 2013. Broadcast partners include industry leaders such as BBC, C-SPAN, Voice of America, Al Jazeera, Entravision, and hundreds of in-language broadcasters around the world.

AudioNow lends its platform to broadcasters on a partnership basis. New partners register through the AudioNow website, and AudioNow issues the broadcaster a unique regular U.S. phone number, which the station can then promote to their audience in the United States. The platform allows listeners without easy access to Internet, smart-phones, or expensive data plans to access audio programming from anywhere in the United States at a very low cost.

In addition to its built-in reach into the global diaspora communities, AudioNow has at its disposal several multi-functional audience research tools, including: real-time, top-line data extraction; in-language telephone survey capabilities; as well as an established connection with station broadcasters, who possess unique insight and access into their respective communities.

In November 2013, AudioNow partnered with the research firm Millennial Strategies LLC to study how the platform’s measurement capabilities can best be leveraged as a data-collection platform. **The primary objective of this study is to develop a high quality, practical research foundation, as well as an appropriate methodology for future AudioNow measurement efforts.**

A top-line analysis of caller and station data showed that at least **84 distinct ethnic groups are represented amongst AudioNow callers**. The reach of AudioNow into certain U.S. ethnic markets, in fact, is significant. For example, when comparing the AudioNow population size of specific immigrant communities against U.S. Census data, **the platform reaches more than 69% of Somalis; 20% of Haitians; and 18% of the foreign-born Ethiopian populations in the continental U.S.** (*Table 1*).

*Table 1: Reach within U.S. Ethnic Communities (September)*

Diaspora	% Reach	U.S. Unique Callers	U.S. Population
Somali	69%	58,780	85,700 <sup>a</sup>
Tigrigna	29%	5,750	20,000 <sup>c</sup>
Haitian	20%	119,676	592,260 <sup>a</sup>
Ethiopian	18%	29,565	162,044 <sup>a</sup>
Kenyan	5%	4,956	102,561 <sup>a</sup>
Ghanaian	2%	2,526	130,399 <sup>a</sup>
Jamaican	1%	10,254	696,998 <sup>a</sup>
Vietnamese	1%	8,054	1,259,317 <sup>a</sup>
Hmong	1%	1,984	260,073 <sup>a</sup>

- a. *U.S. Census Bureau (2011)*
- b. *The World Factbook*

**This study seeks to demonstrate the platform’s capabilities to probe deeper into the ethnic community.** Specifically, it profiles AudioNow’s two largest ethnic groups, the Haitian and Somali diasporas, through an in-language telephone survey. The survey is designed to collect information about the diaspora’s demographics as well as remittance habits, as a means of demonstrating AudioNow’s unique reach and data collection capabilities. The results are presented below.

CASE STUDIES

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This study probes AudioNow’s two largestest ethnic diasporas (Haitian and Somali) via a targeted in-language telephone survey. From December 11-18 (2013), this 14-question survey was delivered across five stations, which were selected to reflect the estimated national distribution of both diasporas (Census), covering key U.S. metropolitan markets. The questions were translated into the native languages for both ethnic diasporas (French-Creole and Somali), and probed for key demographic information, as well as remittance habits.

Station	Market Distribution
<i>Somali Diaspora</i>	
Somali Radio Network	MN 38%, ME 11%, WA 5%, OH 5%, MA 3%
DalkaTV	MN 33%, OH 9%, WA 6%, CA 5%, IL 4%
Hargeisa	MN 20%, WA 12%, OH 10%, TN 7%, CA 6%
SSC	MN 42%, OH 9%, WA 8%, CA 5%, AZ 3%
<i>Haiti Diaspora</i>	
Kiskeya	FL 45%, NY 18%, NJ 13%, MA 9%, CT 5%

Survey responses were combined with additional sources – including extrapolated data, conversations with AudioNow staffers and station broadcasters, and external data and existing research – to generate a more complete profile of both ethnic groups.

GROUP #1: U.S.-HAITIAN DIASPORA

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The U.S. Census Bureau estimates the population of foreign born Haitians living in the United States in 2011 to be 592,260. When taking into consideration undocumented migrants, which have been estimated to be 75,000-125,000 people, and the fact that ancestry may be under-reported on the Census, the actual size of the population may be considerably larger. The first wave of Haitian immigrants to the U.S., estimated around 3,000 immigrants per year, occurred in the late 1950 through 1960 as people fled a dictatorial regime. Between 1980 to 2000, the Haitian-born population in the U.S. quadrupled from 92,000-419,000. The population has continued to grow over the past two years, but at a slower rate. The 2010 earthquake in Haiti has been an important contributing factor to continued migration to the U.S. The largest U.S.-Haitians immigrant populations are concentrated in Florida, New York, New Jersey,

Massachusetts, Connecticut and Georgia. The World Bank estimates U.S. remittances to Haiti represent the fourth largest remittance corridor in the world, with U.S. Haitians remitting an estimated \$2 billion a year.<sup>1</sup>

### Survey Results:

From Dec. 11-17 (2013), **547 respondents completed the survey**, at a **response rate of 17.1%**. This number is significant, considering that the average response rate for telephone surveys is at 9% according to Pew Research.<sup>2</sup> The survey was conducted in French-Creole on Radio Kiskeya, which is AudioNow's third largest Haitian radio partner, reaching an estimated 5,242 callers in September.

## KEY FINDINGS

*Top-Line Profile (Note, these findings are based on Phase I extraction data for **September callers**)*

- There were **124,295 unique** callers in the month of September. The location of these callers originated from **62 total countries**.
- **96% of callers are U.S.-based (119,676)**, which reflects an estimated **20% of the total U.S.-Haitian population** (*Table 1*).
- Most listeners are located in **Miami (45%), New York (18%), New Jersey (13%), Boston (9%), and Hartford (4%)** metro areas, reflecting national distribution (Census).
- Haitian callers have the highest average call time of all known AudioNow ethnic groups at **31 minutes per call**.
- On average, each listener calls more than **15 times per month**.
- **348 AudioNow stations service the Haitian community**, which is 7 times greater than any other AudioNow ethnic group.

### Demographic Profile

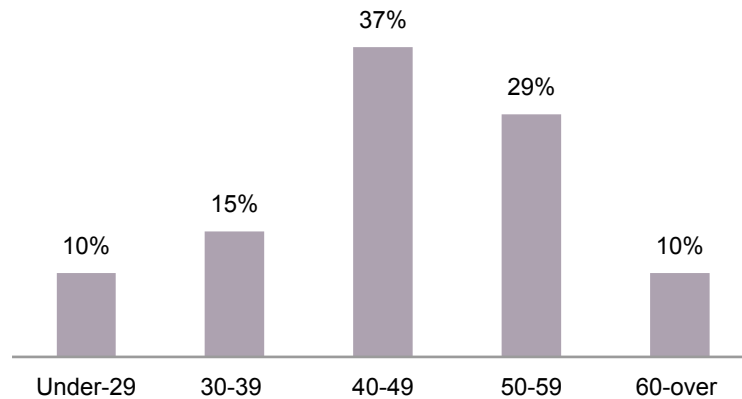
- **Haitian respondents are overwhelmingly male. 93% of respondents were male; 7% female.** While the U.S.-Haitian community is known to be a traditionally patriarchal society, the high percentage of males versus females is a surprising result. These numbers differed significantly from Census estimates, which report that more than half of Haitian immigrants are female – 54% female, 46% male. The Kiskeya station contact suggests that many females possibly refused to take the survey because of the sensitivity to income and remittance-related questions. However, further inquiry is needed to determine the gender disparity of the respondents.

<sup>1</sup> See: <http://remittanceprices.worldbank.org/en/corridor/United-States/Haiti>.

<sup>2</sup> See: <http://www.people-press.org/2012/05/15/assessing-the-representativeness-of-public-opinion-surveys/>

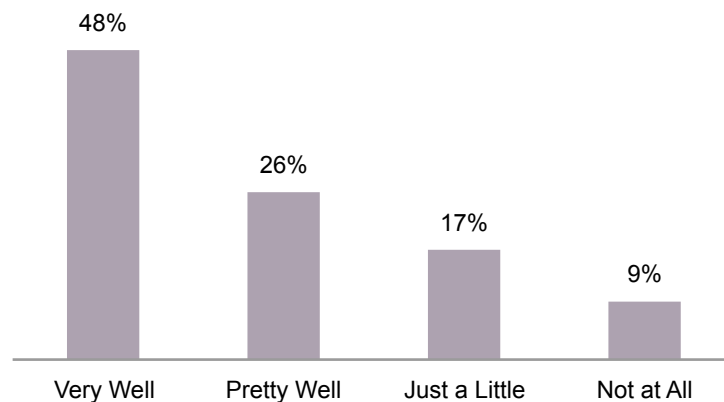
- **The median age of respondents is “40-49,” which is significantly higher than the national average.** According to the Census, the median age of the U.S.-Haitian population (30) is younger than the total U.S. population (37).

Figure 1: Age Distribution (Haiti)



- 48% of respondents reported that they spoke and understand English “very well,” which qualifies as being “proficient” in a language; while 26% “pretty well, which qualifies as “nearly proficient” (Figure 2). **This means that 48% of Haitian callers are English-proficient, while 74% are “nearly” English-proficient.** These numbers indicate a 15% higher rate of proficiency for AudioNow listeners than the national average for the U.S.-Haitian community (Migration Policy Institute reported Haitian proficiency to be at 33%).<sup>3</sup> Further, this demonstrates the ability of AudioNow to garner data with limited literacy.

Figure 2: English Proficiency (Haiti)

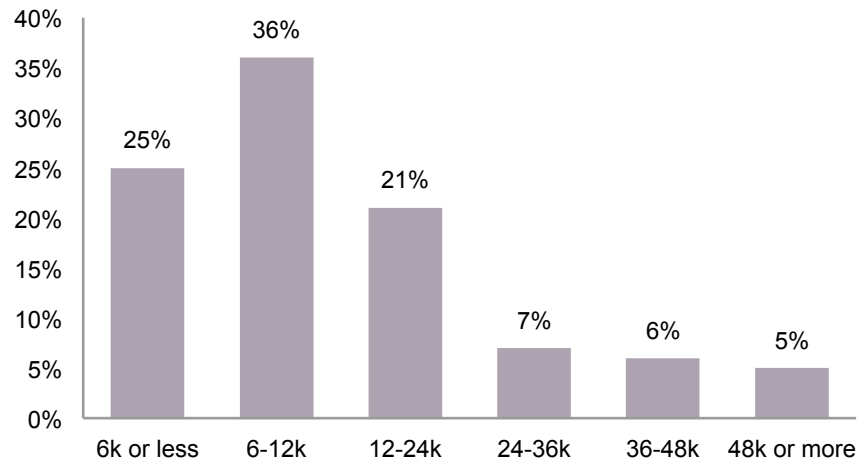


- **The median per capita income is \$6,000- \$12,000 a year, and the mean income is approximately \$15,176. a year.** The 2011 Census estimates that each foreign-born Haitian, per capita, makes on average \$17,594. However, many Haitian community

<sup>3</sup> See: <http://www.migrationpolicy.org/article/haitian-immigrants-united-states#10>.

organizations, which can often have a more accurate pulse of the community, estimate that per capita income can range from \$6,000 to \$15,000 per annum.

Figure 3: Income Per Capita (Haiti) – USD



- **68% of U.S.-Haitian respondents access the Internet on their cell phone, which is 6% higher than the national average (62%).<sup>4</sup>** There is limited data detailing smart phone usage for the U.S.-Haitian community, and ethnic diasporas as a whole. However, Nielsen reports that Latinos have the highest known smart phone usage of any “known” ethnic group at 72% usage, which differs by only 4% from the Haitian sample.

#### Remittance Profile

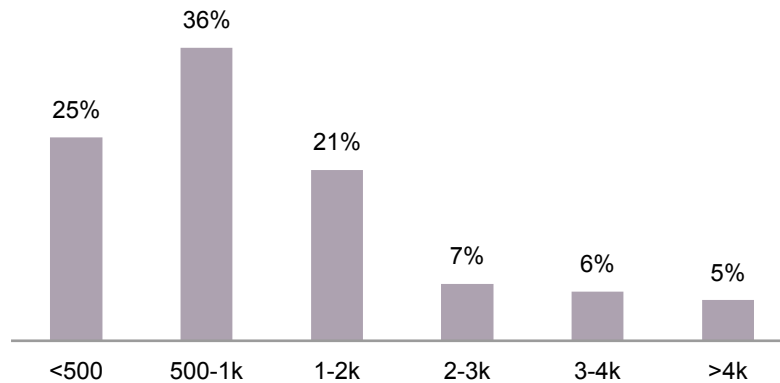
- **95% of listeners send money to family and friends in Haiti.** This number is significant, though the exact scale is difficult to determine. The percentage of U.S. immigrants that remits every year ranges depending on ethnicity, but generally this number is expected to be quite high considering remittances are a primary driver of foreign development. However, a vast majority of the remittance data available is generated from the *recipient* level in home countries. This survey has the unique advantage of measuring data directly from the *sender*, which can provide a more accurate numerical representation.
- **On average, remitters send money at least once a month, while a majority of remitters (52%) send money at least twice a month. The median amount sent per remittance is \$100- \$200 dollars, which is higher than the reported average of \$80 to \$120 a month (World Bank).** Again, there is limited data detailing the frequency and amount sent per individual. However, some estimates report that “households” typically transfer about \$1,000 to \$1,400 per year (United Nations - 2005).<sup>5</sup>

Figure 4: Amount Sent Per Remittance Payment (Haiti) - USD

<sup>4</sup> See: [http://es.nielsen.com/site/documents/State\\_of\\_Hispanic\\_Consumer\\_Report\\_4-16-FINAL.pdf](http://es.nielsen.com/site/documents/State_of_Hispanic_Consumer_Report_4-16-FINAL.pdf).

<sup>5</sup> See: [http://www.un.org/esa/population/migration/turin/Symposium\\_Turin\\_files/P01\\_ASimmons.pdf](http://www.un.org/esa/population/migration/turin/Symposium_Turin_files/P01_ASimmons.pdf).





- **The U.S.-based AudioNow Haitian community sends an estimated total of \$137-\$273 million home each year.** This value was calculated using the above findings – 95% of U.S.-based listeners (119,928) send money at a range from \$1,200- \$2,400 per year. The World Bank estimates that as much as \$2 billion is sent home a year from the U.S.-Haitian community. Using this number as a baseline, **AudioNow callers constitute an estimated 6.9% -13.8% of all remittance money inflow into Haiti.**
- **97% of respondents use Money Transfer Operators (MTOs) to send money to Haiti.** Again, this number is significant, though the exact scale is difficult to determine. There are numerous MTOs available to send money to Haiti (as many as 20). Based upon conversations with several AudioNow Haitian station contacts, as well as local Haitian community organizations, the primary MTOs that service this community are: Uni Transfer from Uni bank (a Haitian bank); Western Union; and MoneyGram.
- **79% of respondents believe the restrictions to send money abroad are too severe, which continues to be a particularly contentious issue within the Haitian community.** In 2011, the Haitian government, spearheaded by president Michel Martelly, imposed a \$1.50 tax on all remittance transfers into the country, amounting to millions of dollars every year. Many in the Haitian community have reported “outrage” over the new tax. Another factor restricting remittances is lack of documentation for many within the Haitian community. However, in the wake of the 2010 earthquake that killed more than 220,000 Haitians, the U.S. government gave roughly 200,000 immigrants temporary protected status.
- **75% of respondents believe the charges to transfer money to Haiti are too high.** In 2013, the World Bank reported that Haitian migrants in the U.S. paid an average fee of \$12.60 for every \$200 payment.<sup>6</sup> (Note, the highest recorded cost to transfer \$200 was from the Dominican Republic to Haiti, with an average cost of \$22).<sup>7</sup> AudioNow station contacts suggested that the high fees happen because Haitian immigrants have poor access to information. Low education and perceived lack of options result in people feeling forced to pay high fees. For example, a United Nations report states that many within the

<sup>6</sup> See: <http://remittanceprices.worldbank.org/en/corridor/United-States/Haiti>

<sup>7</sup> Ibid.

Canadian-Haitian diaspora feel transfer fees are generally too high, and that they cannot transfer money as often as they would like.<sup>8</sup>

- Remittances are a deeply “personal” issue that connect immigrants with families and friends in their homeland. And while a majority of Haitian respondents express frustration with transfer fees and burdensome restrictions, they also **strongly value the service provided by their MTO. Note, 89% of listeners responded as being “satisfied” with their MTO, while 93% say they “trust” their MTO to deliver their money safely.**

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## GROUP #2: US-SOMALIA DIASPORA

The Census estimates that there are 124,431 people of Somali ancestry living in the United States. Of this population, 74,460 are foreign born. Community leaders within the Somali U.S. diaspora often report the population to be much higher. The Somali people began arriving to the U.S. in the 1940's, but more than 29 thousand arrived in the 1990's as refugees when civil war broke out in Somalia.

### Survey Results:

From Dec. 11 to Dec. 18 (2013), a survey was delivered to Somali audiences across four AudioNow partner stations. **109 participants chose to complete the survey.** The response rate varied across stations, producing a **median response rate of 6.3%**. Interestingly, Somali listeners were very willing to answer demographic questions, showing a total response rate of **24%** across selected stations.

### KEY FINDINGS

*Top-Line Profile (Note, these findings are based on Phase I extraction data for **September callers**).*

- During September, there were **105,253 unique callers**, which comprised more than **26%** of total AudioNow call volume.
- The Somali diaspora **logged 36.1 million total minutes** and **1.8 million total calls**.
- On average, each unique called **17 times per month**; and spoke for **19 minutes per call**. The sub-population of callers originating within Somalia produced low numbers for both – at 1.73 calls per unique per month and .76 minutes per call. A higher drop-call rate was expected, however, considering the weaker telecommunications infrastructure and cellular signals in developing countries like Somalia. However, once excising these Somalia callers from the September sample, the remaining call volume was quite high at an average of **24 calls per unique user**, which is the third highest of all AudioNow ethnic groups.

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<sup>8</sup> Alan Simmons, Dwaine Plaza and Victor Piché, “The Remittance Sending Practices of Haitians and Jamaicans in Canada.” Report presented as part of Expert Group Meeting for the United Nations, Mexico City, (2005). [http://www.un.org/esa/population/migration/turin/Symposium\\_Turin\\_files/P01\\_ASimmmons.pdf](http://www.un.org/esa/population/migration/turin/Symposium_Turin_files/P01_ASimmmons.pdf).

- **Calls originated from 66 countries, which is the highest of any AudioNow ethnic group.** The highest number of unique callers was located in the U.S. (58,780). The call volume and diversity of foreign-based callers (outside the U.S.) was significantly higher than all other AudioNow ethnic groups, **with more than 44% located outside the United States.** The distribution of foreign callers is as follows:

*Table 1: Location of Somali Callers by Country (September)*

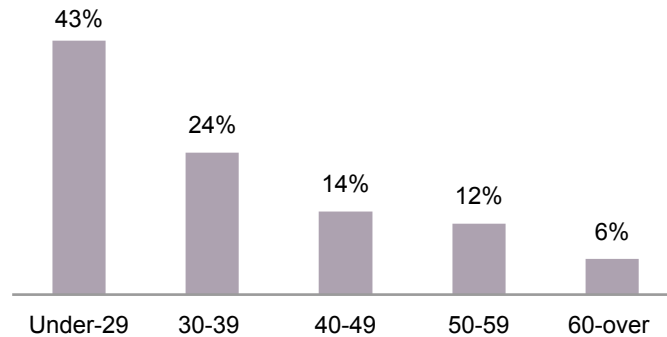
<b>Country</b>	<b>Uniques</b>	<b>Min</b>	<b>Calls</b>
United States	58,780	32,051,642	1,552,225
Somalia	26,247	45,551	59,701
United Kingdom	6,229	2,409,839	125,306
Canada	1,860	765,877	36,290
Turkey	1,134	3,387	2,201
South Africa	1,129	8,431	3,420
Kenya	725	6,218	1,763
Sweden	538	30,592	2,810
Norway	526	163,076	7,362
Austria	387	118,886	4,865

- U.S.-based callers have an estimated reach of **69% into the American-Somali population** (Table 1). This is **three times greater than the Haitian diaspora**, which has the second largest reach at 20%.
- There are **27 AudioNow member-stations** delivering content to the Somali diaspora. BBC Somalia is the largest AudioNow partner station, which accounts for nearly 50% of all Somali callers.
- The location of U.S.-based Somali callers reflects the national distribution (Census), with callers concentrated in several key metropolitan areas – **Minneapolis/St. Paul (MN); Atlanta (GA); Columbus (OH); Seattle (WA); and New York (NY).**

Demographic Profile

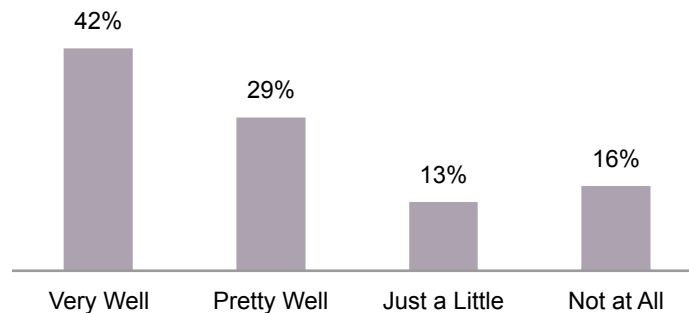
- **Somali listeners are predominantly male. 79% of respondents were male; 21% female.** These results show a 10% higher percentage of males compared to national estimates (Census), but also reflect the overall finding that AudioNow listeners tend to be predominantly male.
- **The median age is between 30 and 39 years old. 43% of respondents were under age 29, and a majority were under the age of 39 (67%).** The median range suggests a relatively young population of callers. The Census shows foreign-born Somali residents to have the **youngest median age (26.8) in the nation**, which is significantly younger than the median age for the total U.S. population (36.7), as well as the median age for the foreign-born population (40.2).

Figure 5: Age Distribution (Somali)



- 42% of respondents are English proficient; while 71% are “nearly” English proficient.** These numbers are as much as 13 percentage points higher than MPI (Migration Policy Institute) estimates, which reported in 2011 that only 29% of Somali immigrants speak English “very well.”<sup>9</sup> (Note, the 42% of respondents who answered that they speak and understand the English language “very well” are considered “proficient;” while the 29% of respondents who answered “pretty well” are considered “nearly” proficient).

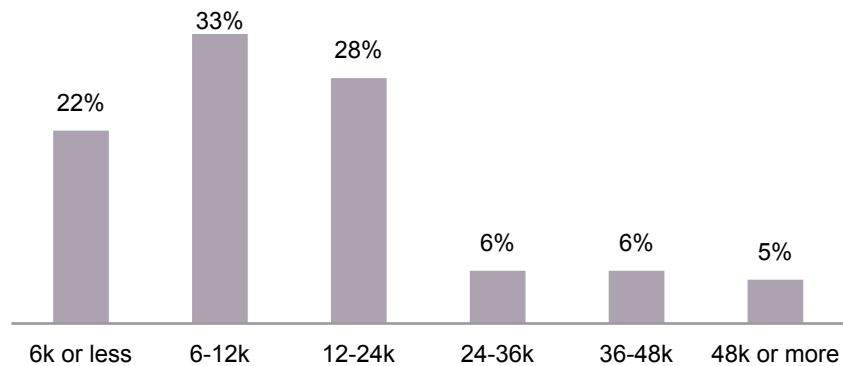
Figure 6: English Proficiency (Somali)



- The median per capita income is \$6,000 - \$12,000 USD a year, which reflects national estimates. The mean income per year is approximately \$16,071.00.** According to the U.S. Census the U.S.-Somali community has one of the lowest per capita incomes of all communities at \$10,135. This is more than \$28,000 less than the average national per capita income at \$38,611.

Figure 7: Monthly Income Level (Somali) – USD

<sup>9</sup> See: <http://www.migrationpolicy.org/article/african-immigrants-united-states>.



- **45% of respondents access the Internet on their cell phone, which is 17% lower than the national average. As previously discussed,** Nielsen reported that 62% of Americans own smart phones. Though, it is difficult to assess the significance of the results, as there is little information on Somali cell phone usage, in general.

#### Remittance Profile

- **75% of respondents reported that they send money to family and friends in Somalia, which reflects most estimates.** For example, Oxfam reports that anywhere from 60%-80% of Somali immigrants living in the U.S. send money to Somalia each year.<sup>10</sup> The World Bank estimates the remittance in flows into Somalia to be in the region of \$1 to \$2 billion annually, which is by far the biggest contributor to the economy (as much as 54% of the country's GDP), with a significant portion contributed by U.S.-based migrants – \$214 million to Somalia each year.<sup>11</sup>
- **80% of remitters send money on average once a month, at a median amount of \$100-\$200.** About 30% of remittance transfers (\$234 Million) come in as capital and/or financial investments and the remaining 70% (\$546 Million) comes in as small money between \$100 and \$500.<sup>12</sup> In 2005, the World Bank reported that the average remittance payment to be \$200. However, this claim cannot be substantiated.<sup>13</sup>

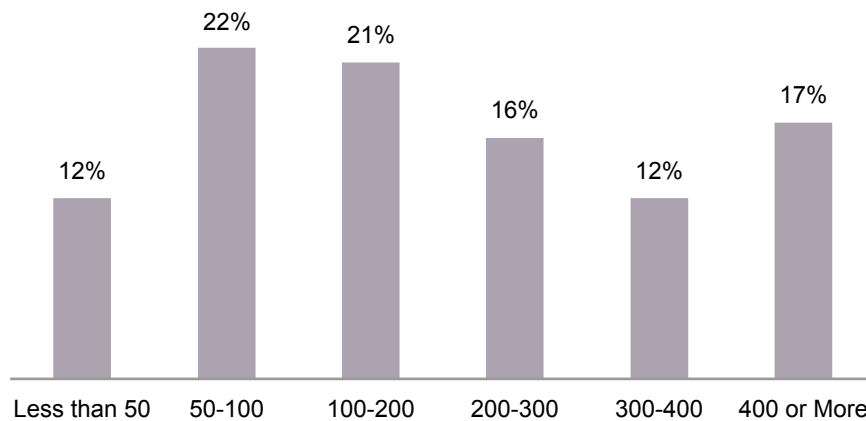
Figure 8: Amount Sent Per Remittance Payment (Somali) - USD

<sup>10</sup> Manuel Orozco and Julia Yansura, "Keeping the Lifeline Open: Remittances and Markets in Somalia," Oxfam America. See: <http://www.oxfamamerica.org/static/oa4/somalia-remittance-report-web.pdf>.

<sup>11</sup> *Ibid.*

<sup>12</sup> *Ibid.*

<sup>13</sup> Samuel Maimbo, "Remittances and Economic Development in Somalia." World Bank Briefing 38, Nov. 2006.



- The total amount (USD) remitted by U.S.-based callers per year is estimated to be \$52-\$104 million a year. The World Bank estimates that which accounts for as much as 13% of the global estimated remittance inflow into Somalia.** This calculation was based on the assumptions that 75% of the U.S. callers (58,780) sends \$1200-\$2400 a year.
- 89% use MTOs to remit their money.** Somalia is essentially a cash society where there is no common platform for international or domestic payments between existing financial institutions. Therefore, cash and payment orders are the only meaningful payment instruments widely used in the economy. In the absence of an internationally recognized bank in Somalia, many of these remittance companies are considered “local banks.” According to station contacts and several Somali community organizations, **the primary MTOs include Dahabshiil, Qaran, Mustaqbal, Amal, and Kaah.**
- 89% of listeners say they are “satisfied” with their MTOs; while 93% say they trust their MTOs to deliver their money safely.** The successful growth of remittance companies for this diaspora is almost completely dependent on social capital – namely the cohesiveness and trust within communities (clans). The Somali diaspora frequently uses the “Hawala” system to transfer money, which is used primarily in Islamic societies, where transactions are done without promissory notes and are based on trust. Had it not been for the existence of this social capital and the Hawala system, Somalis would have not had access to assistance from the U.S.-diaspora.
- 35% believe the charges are too high, while 25% say that restrictions are too severe.** Strict regulations and increased criminal penalties to banks connected to money laundering of terrorist groups, have resulted in many banks closing the Somali-American MTO accounts, greatly limiting and even closing some operations. As a result of the new regulations, Somali immigrants have suffered limited channels to remit money home, and increased transactions fees. MTO customers who fail to show identification for a transaction, or use multiple money transfer services at any one time, are flagged in the system, customer’s money transfers are delayed while MTOs draft required suspicious activity reports. Recently, remitters have turned to larger transfer services such as

MoneyGram or Western Union, or attempted to send funds through neighboring country channels, both resulting in higher transfer costs.<sup>14</sup>

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<sup>14</sup> Orozco and Yansura, "Keeping the Lifeline Open."

#### About AudioNow

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For more information about this report and AudioNow contact Natalie White at [natalie.white@audionow.com](mailto:natalie.white@audionow.com).



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