



Ipsos Synovate

Ipsos MediaCT

The Media, Content and Technology Research Specialists

MEDIA MONITORING: Focus on Political issues and Governance

Marketing & Social research Association



Date 2012

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1. Why Media Monitoring?
2. Identifying the nature of media content and regulations
3. Advertiser Watch

Introductions

**WHO
ARE
WE?**

About Ipsos:

- Founded in France in 1975 (and was in 68 countries)
- Ipsos and Synovate, **the 3rd largest global market research** company in a consolidating market comprising

Way forward:

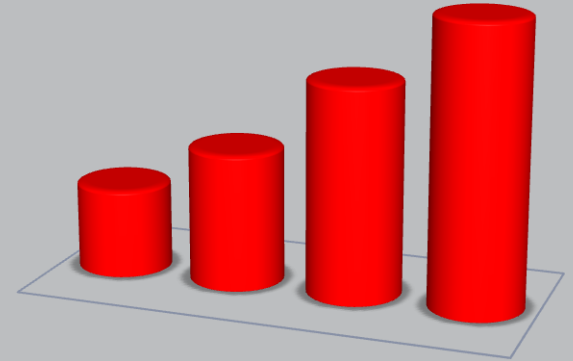
- Our new corporate identity “**Ipsos-Synovate**”

Why Media Monitoring?

Offering solutions

Media Monitoring allows us to capture three key objectives

- 1) Tracking trends in exposure.
Both paid for and unpaid
(broadcast monitoring)
- 2) Tracking how issues and stories
are reported in the media
(editorial monitoring)
- 3) Tracking trends in media
consumption habits
(audience measurement)



MCIG'S

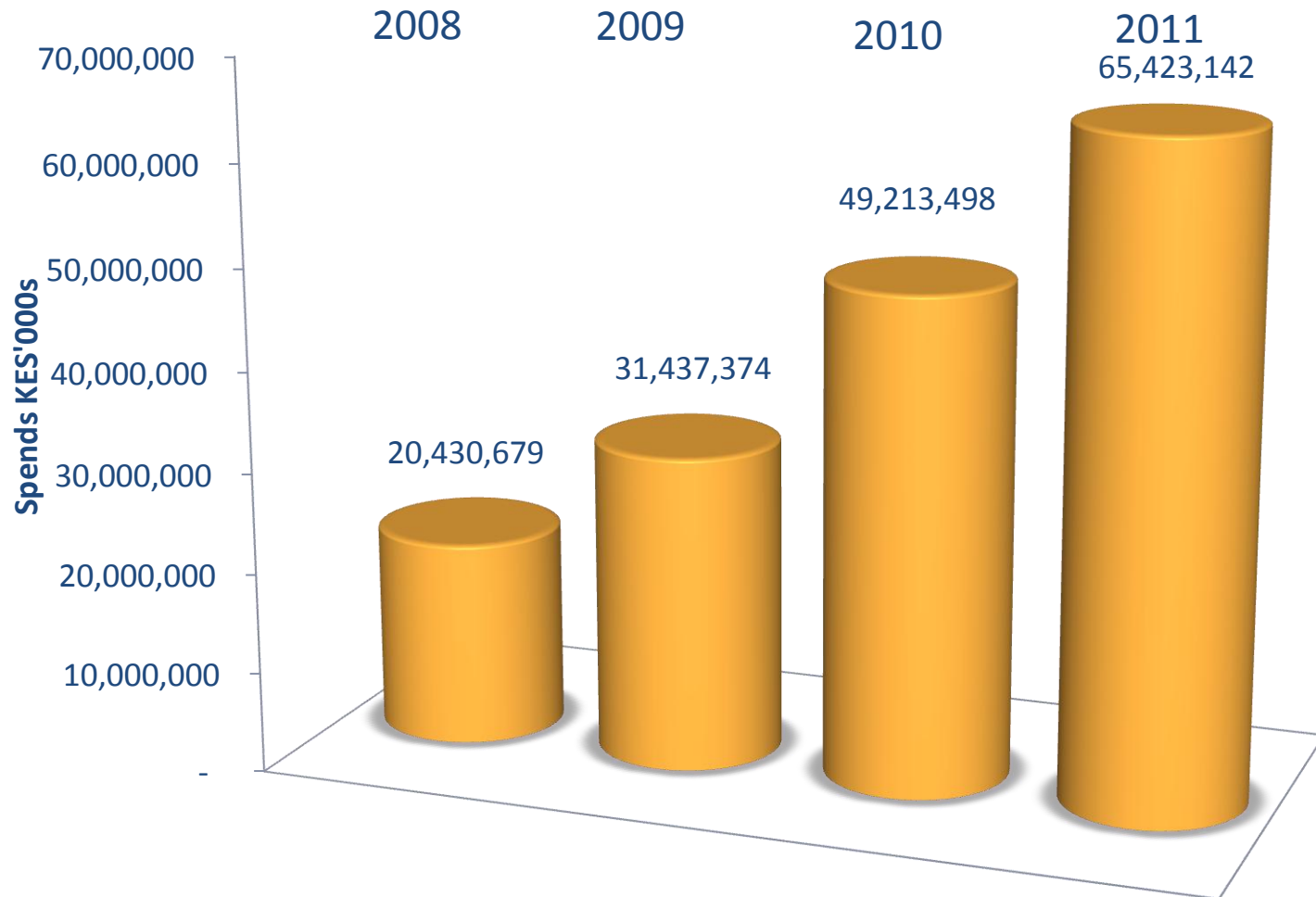
BROADCAST MONITORING

**WHO IS
SPENDING
AND
WHERE?**

Industry Ad Exposure

Yearly Growth 2008 - 2011

220 % growth in Spends from 2008 – 2011



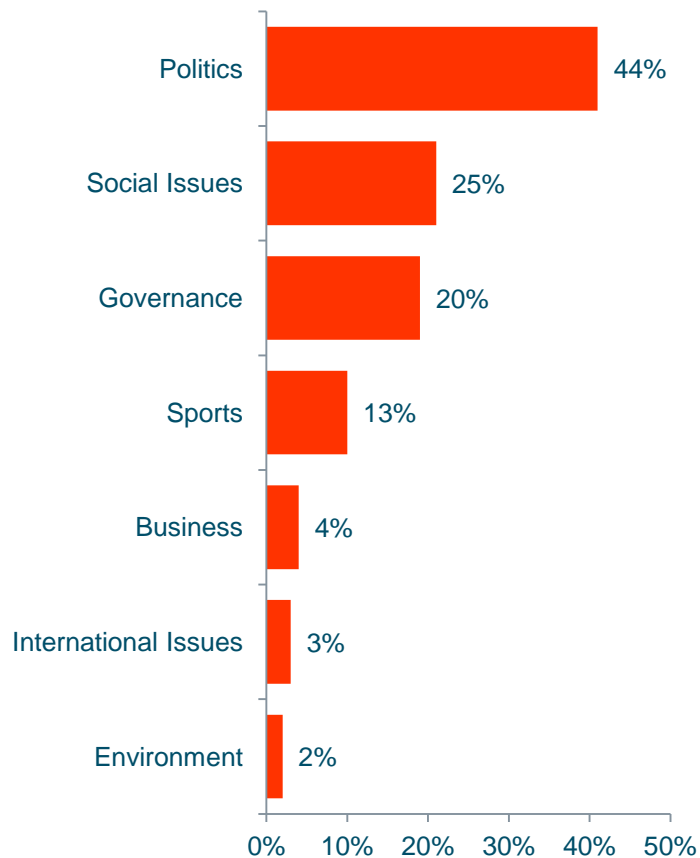
- 1) growth in industry advertising shows renewed confidence over the years in the market place
- 2) we are likely to see more growth as the spends during 2007 will be surpassed by those in 2012 due to the change in the political climate
- 3) The growth experienced in Kenya is higher than that seen in other countries
- 4) advantages of real time automated media monitoring

EDITORIAL MONITORING

**WHO IS
SAYING
WHAT?**

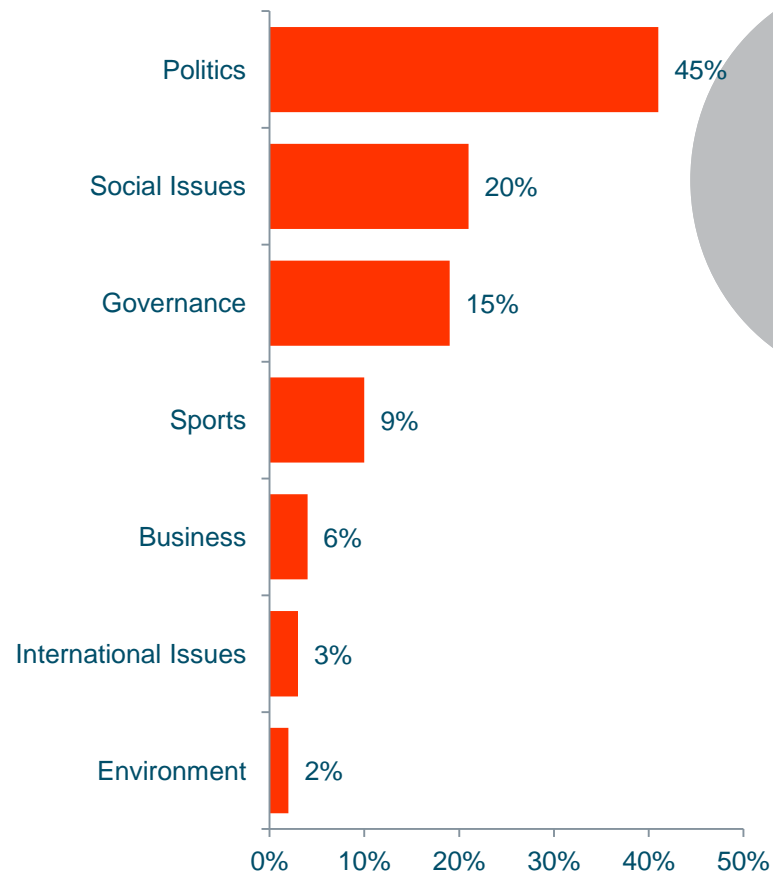
Overall coverage of issues by the media

Qtr 1 2011 Issues



Base:3,253 Clips

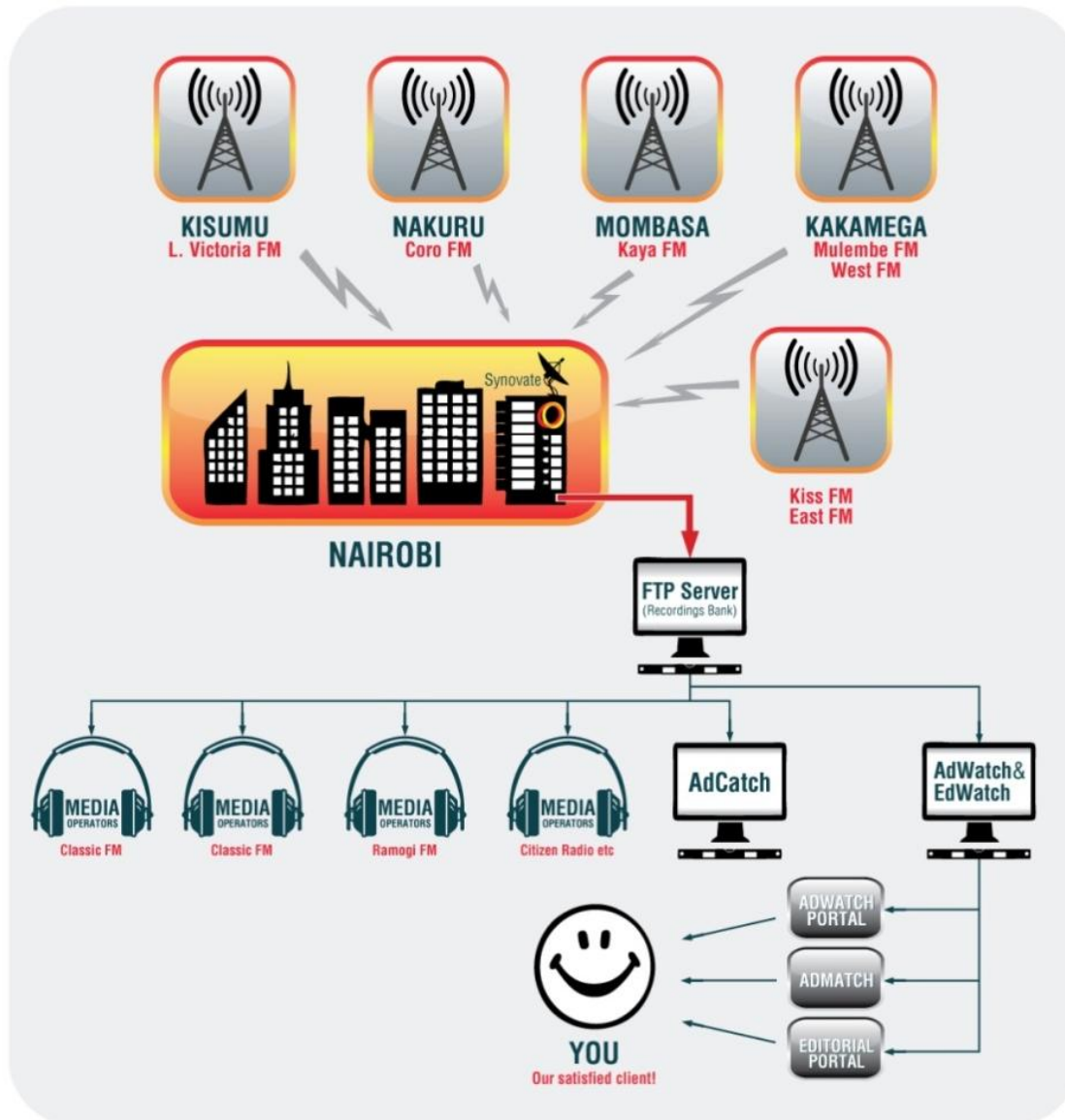
Qtr 2 2011 Issues



Base:2,946 Clips

The data used in this analysis is collected over a period of three months from a select number of publications and broadcast stations. Information is collected from 1st to 3rd and the last pages of newspapers. On TV information is collected for the first 10 minute of news.

Editorial Monitoring process - Electronic



The editorial analysts do:

- Write summaries
 - Clipping
 - Editing
- Of all electronic publicity



Industry activities coverage

telecommunications

Brief Summary	Safaricom	Orange	Airtel	Essar	Grand Total
Sports Sponsorships	559	143	56	12	770
Corporate Affairs	492	113	120	44	769
Industry Issues	252	136	152	97	637
Adhoc Mention	443	46	51	17	556
CSR Issues	139	3	1	3	146
Stock Market Performance	130				130
Launches & Innovation	39	71	2	6	118
People & Alumni	67	7	7	3	84
Other Sponsorships	77		5		82
Partnership	24	18	19	8	69
Complaints	24	13	22	1	60
Promotions	63	2	29	6	58
M-PESA Breakdown	28				28
Vandalism	9				9
Awards	8				8
Grand Total	2354	552	464	197	3567

Nature of Media Content Reporting

**Who is
reporting
what?**

Case study: 2010 Referendum

High volume of share of voice (airtime) and share of ink (ink space) allocated to the “Yes” side Across the board

REFERENDUM LEANING	Print; No. of Pages	Radio; Minutes	TV; Minutes
Yes	225	3169	3722
No	193	2241	3444
Non Leaning	184	1236	885
Grand Total	603	6646	8051

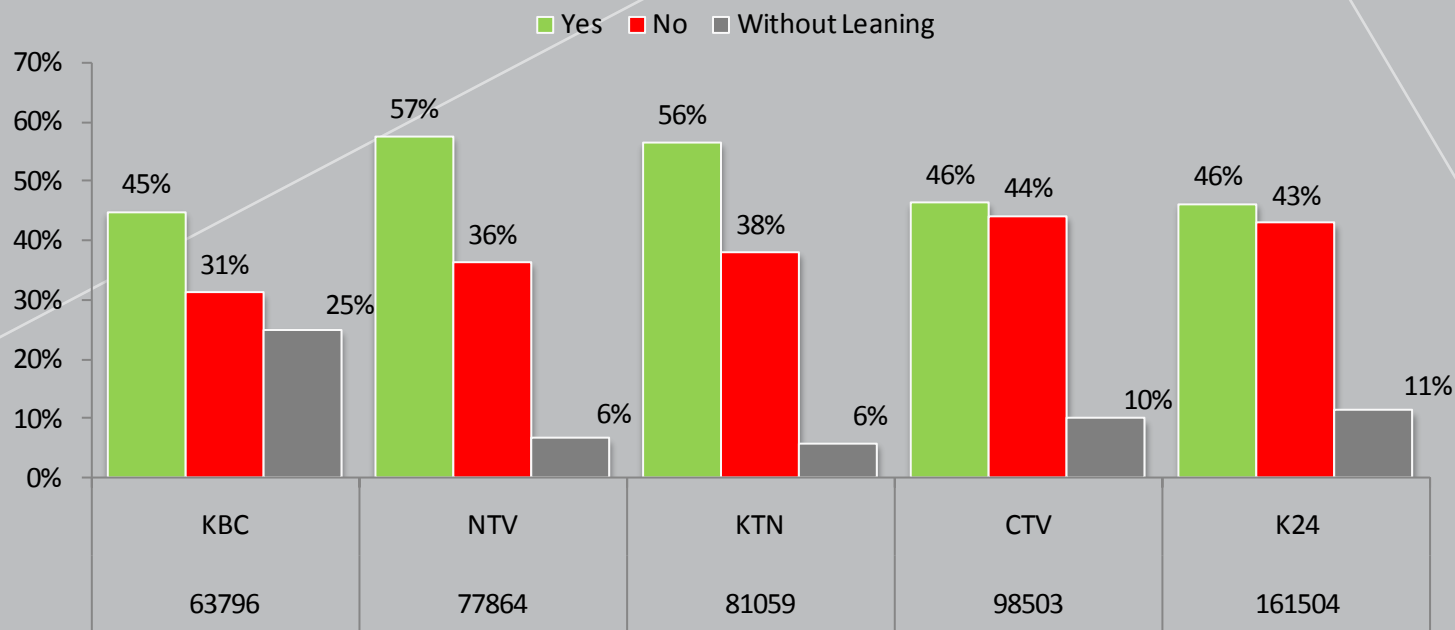
Basis; 9,836 media Counts across 7 Print titles, 44 Radio and 5 TV stations.

- 134 hours on TV, 111 hours on Radio and 603 Pages on print.
- Overall the "Yes" side was allocated 37% of all airtime and 46% of ink space.
- The "No" side was allocated 32% of all airtime and 38% of ink space.
- About 31% of ink space and 17% of airtime was allocated to issues that were related to the referendum but did not relate to either the "Yes" or "No" side.

Over the years we have learnt that during political years , media houses tend to skew their reporting towards personalities or political parties.
(2010 Referendum process)

About 50% airtime allocation for “Yes” across all five TV outlets

Airtime in Seconds(share of voice)



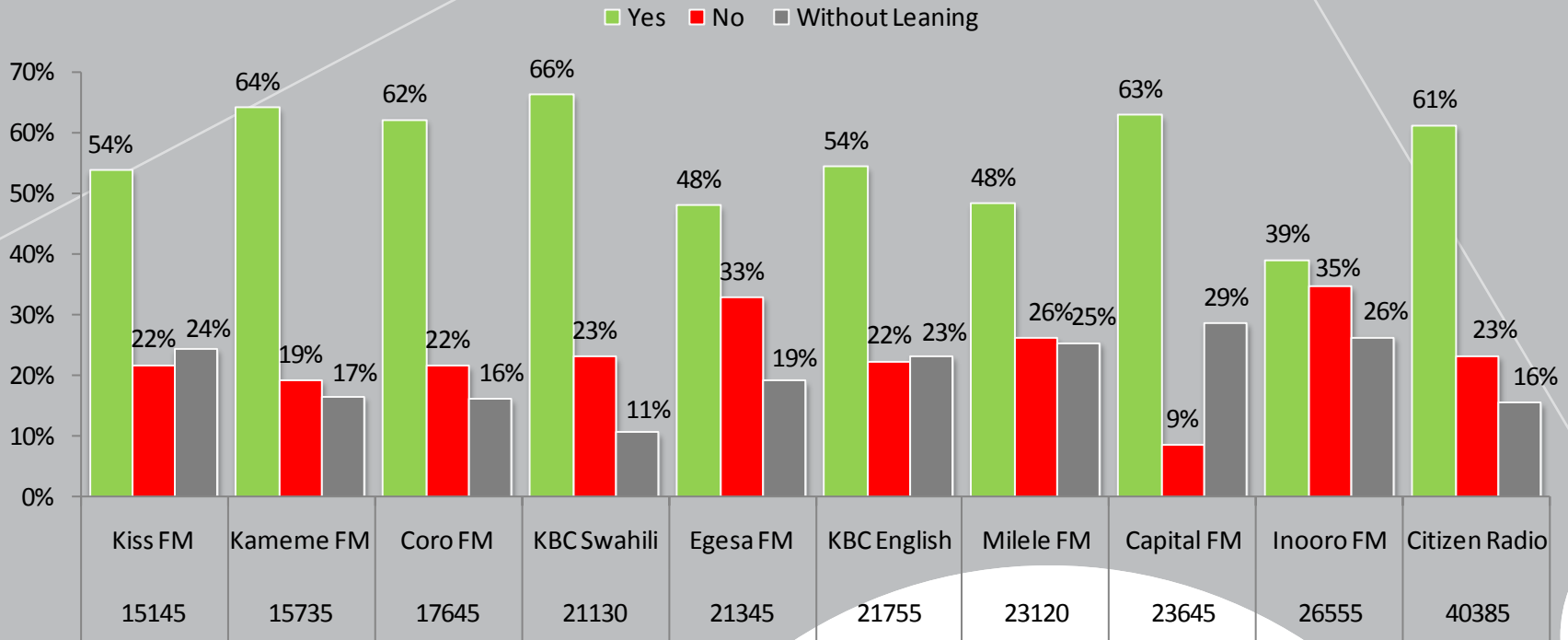
Basis; 483,051 seconds (124 hours) across 5 TV stations in Kenya.

- ‘Yes” side allocated more airtime across all outlets
- Airtime duration may be indicative of frequency counts
- A total of 124 hours allocated on TV

High allocation of share of voice for “Yes” also evident on radio outlets

Airtime in Seconds (top 10 radio)

- Both Vernacular and Urban profile stations featured on top 10
- Inooro and Egesa allocate more airtime to “No” side
- A total of 111 hours allocated on Radio in August 2010

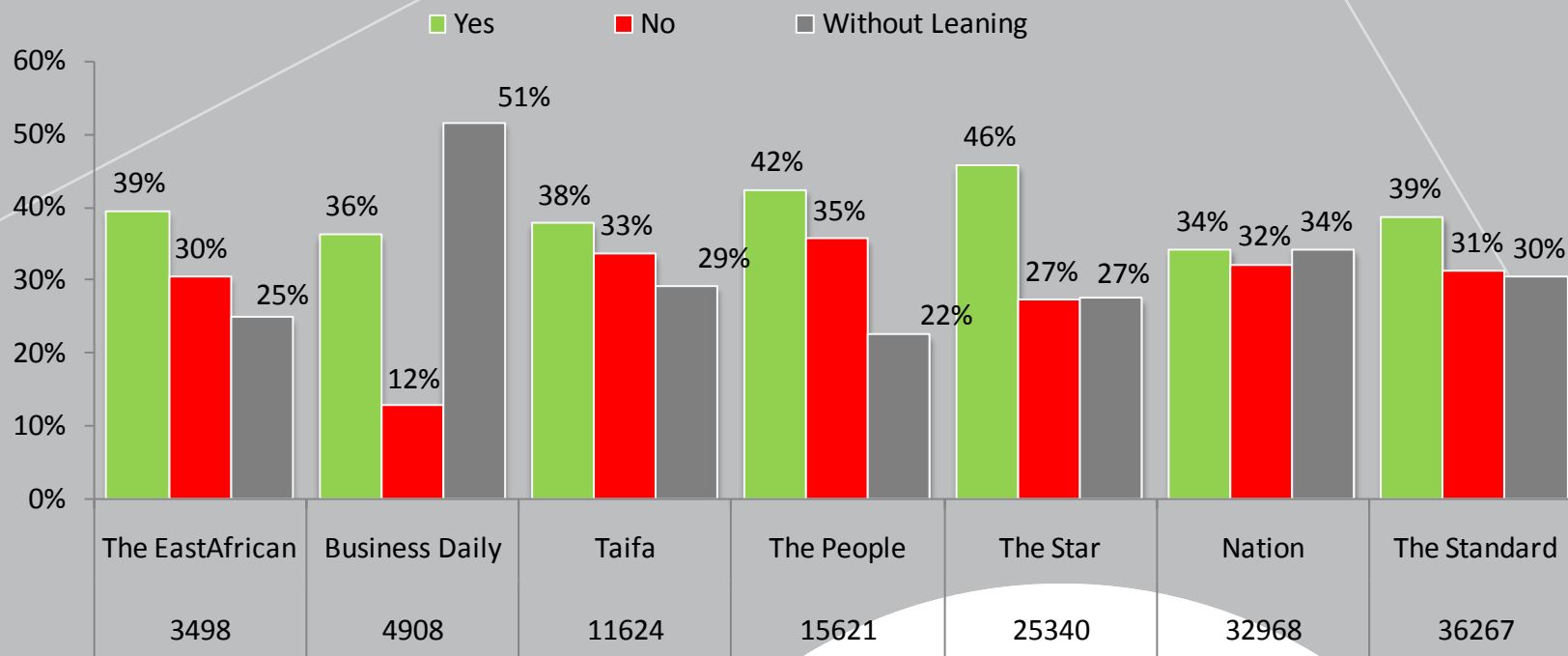


Basis; 226,460 seconds (62 hours) across 10 radio stations with highest airtime allocation in Kenya.

Share of Ink allocation on Print largely high for the “Yes” side.

Ink space in Column Centimeters

- “Yes” side allocated more ink space across all monitored titles
- A total of 602 full newspaper pages allocate to referendum process related content in August 2010.



Basis; 130,226 Col CM (603 full newspaper pages) across 7 major newspapers in Kenya.

■ Skewed reporting

- ⇒ General adherence to Code of Conduct for the Practice of Journalism in Kenya
- ⇒ Certain content requires adherence to set rules and ethics
 - Political/election reporting and rules of fairness
 - Allocation of airtime to parties and personalities
 - Adhering to codes of ethics on reporting Ethnic, Religious and Sectarian issues
 - Verification of facts and figures
 - Avoiding misrepresentation



**Are Media
Houses
Abiding?**

Whilst reporting, what are media houses supposed to adhere to?

MCK Has given guidelines on how to report. These guidelines cover among others:

- Accuracy and Fairness
- Opportunity to reply
- Obscenity, taste and tone
- Intrusion into grief and shock
- Use of pictures and names
- Acts of violence
- Hate Speech

**Government
Regulations
on
Media**

**Are they
too
Stringent?**

Over the 28 years we have monitored Kenyan Media, we have seen drastic changes due to Government implications

- Relations between the mass media and the Kenyan government are tense and the question of controlling these outlets is controversial.
- Controversial policies i.e. Media Bills are perceived by media house and owners as attempts to Gag the media.
- The media seeks greater control in the implementation of policies as part of self regulation
- Media Frequencies have been liberalized i.e. from one State owned Media to more than 100 private media outlets
- We have seen more emphasis placed on Local content. These Has driven media houses to come up with creative ideas to keep their audiences engaged whilst abiding by the rules
- The Government is keen on balanced reporting especially the State Broadcaster. This is specific to politics
- Strict measure have been placed by the government for in coming broadcasters



Advertising rules and regulations

How and
what can you
Advertise or
not?

Case study: Emergence of
regulatory bodies i.e. NACADA
and NCIC

Advertisers and Ad content creators have in the recent past been forced to adhere to rules set, not necessarily by Government but by emerging regulatory bodies

- The Pharmacy and Poisons board has put guidelines in the Advertisement and promotion of medicines. This include content, criteria for approval and restrictions of advertisement.
- Nacada has put the same kind of laws on the alcoholic beverage industry. They are pushing more for the airing of the Ads as well as the content of the Ads.

What we have learnt

Although advertising codes are in place from different sources, adherence is weak advertisers in the Tobacco and Alcohol industry use mediated CSR tactics to bridge the gap created by Anti-tobacco and alcohol advertisement laws. Some big advertisers and sponsors pay journalists and editors to guarantee positive coverage

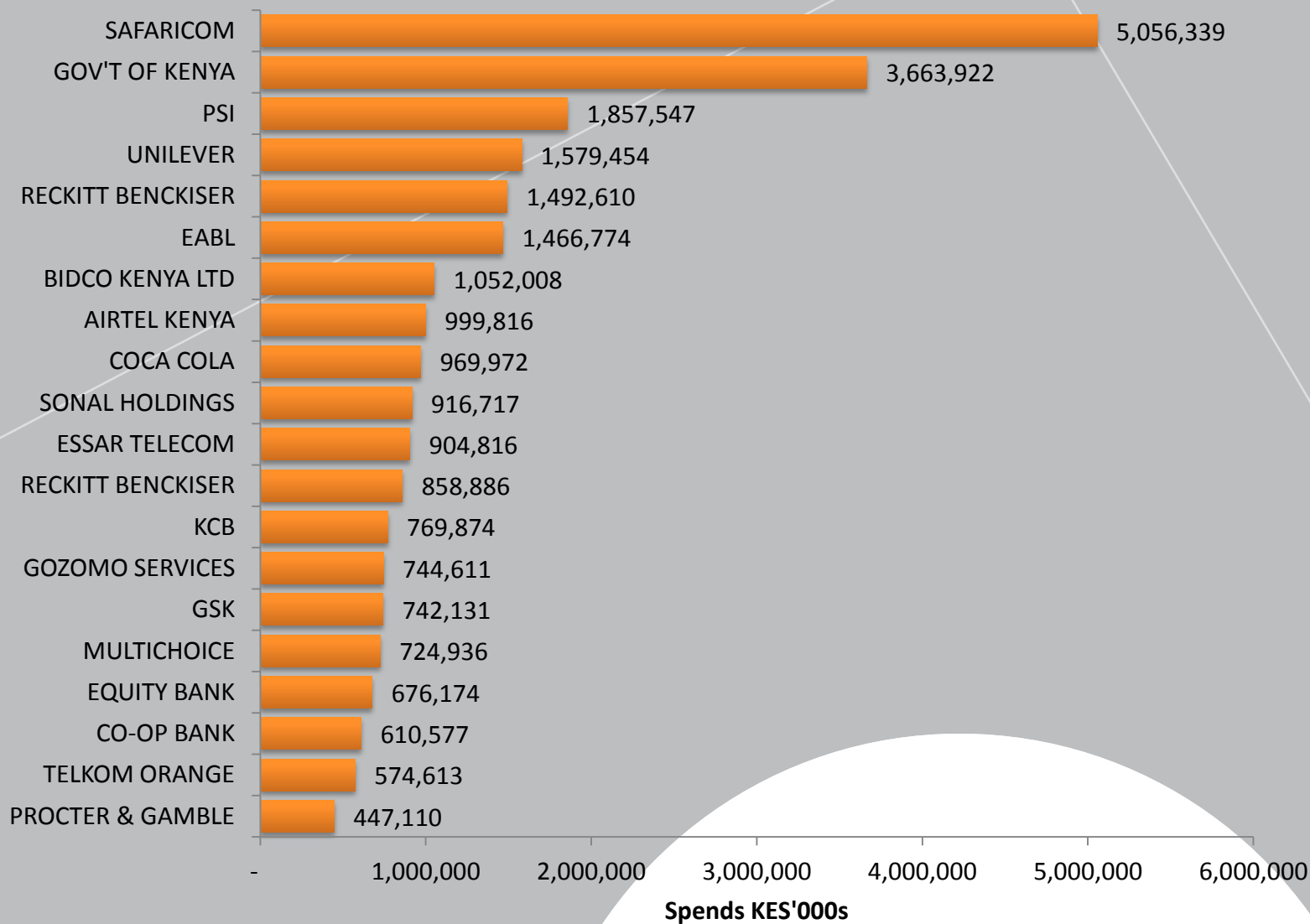
Advertising Pie.

Who has the
biggest
piece?

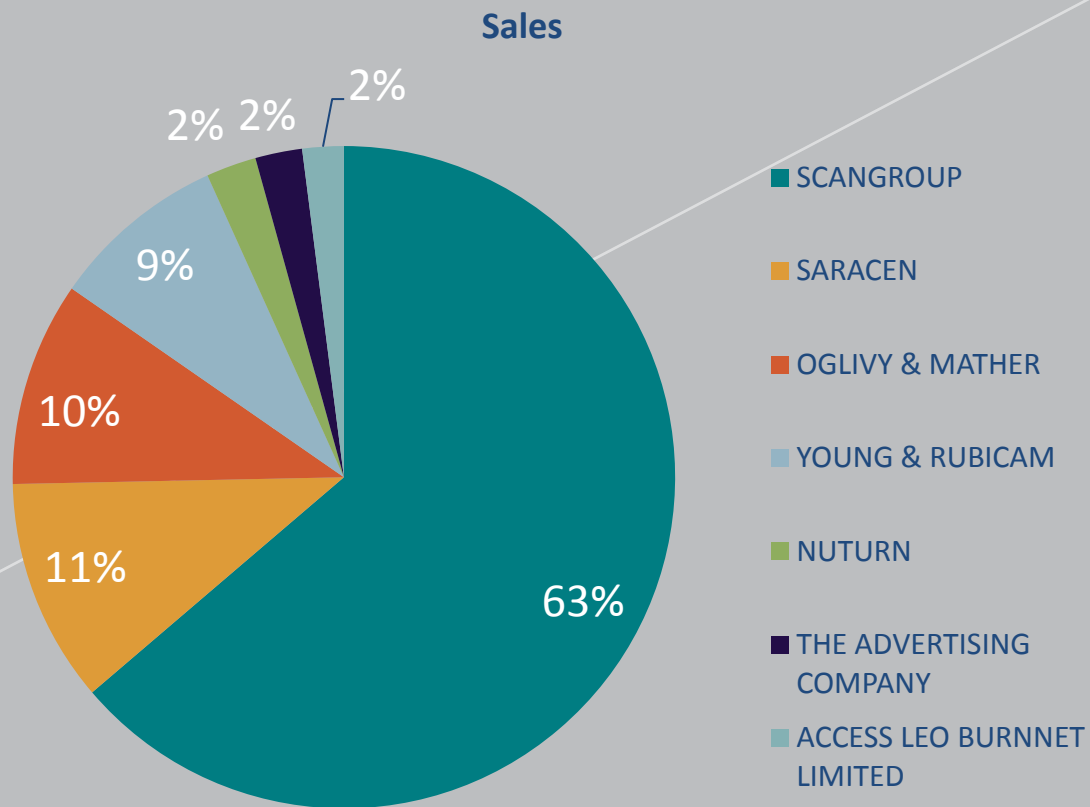
A look at the top spenders

Top Companies 2011

Industry spent 65 billion shillings in 2011, the top 20 spenders are as follows



Top 7 Agencies annual 2011



Total spends
14,043,038,799



SPREAD MARKETING AGENCY LTD
EXPRESS DDB KENYA
SUAVE MEDIA
BRAINWAVE KENYA
MARKETING COMMUNICATION LTD
SMART MEDIA COLLEGE LIMITED
ALL SEASONS COMMUNICATION
CHRISOMS AGENCY
ZK ADVERTISING LTD
MARKETING SCAPES
MEDIA EDGE INTERACTIVE LIMITED

- Growth in media is more skewed TV and Radio. Community radio stations are sprouting in large numbers. Although Print is fading, it will still remain relevant as a key traditional medium. Online reading of the dailies is also a factor to consider in the future
- More companies are opting to do Direct bookings versus agency bookings. This may be due to the fluctuation in rates by agencies caused by rate card changes by media houses
- Editorial monitoring has grown from mere PR to extended coverage of social, economic and political themes
 - ⇒ Media content is diverse
 - ⇒ Segmentation of issues based on thematic coding
 - ⇒ Identification of key prominent themes on social, economic and political issues
 - ⇒ Tracking specific social issues based on current “social discourse”



Questions and comments?

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