



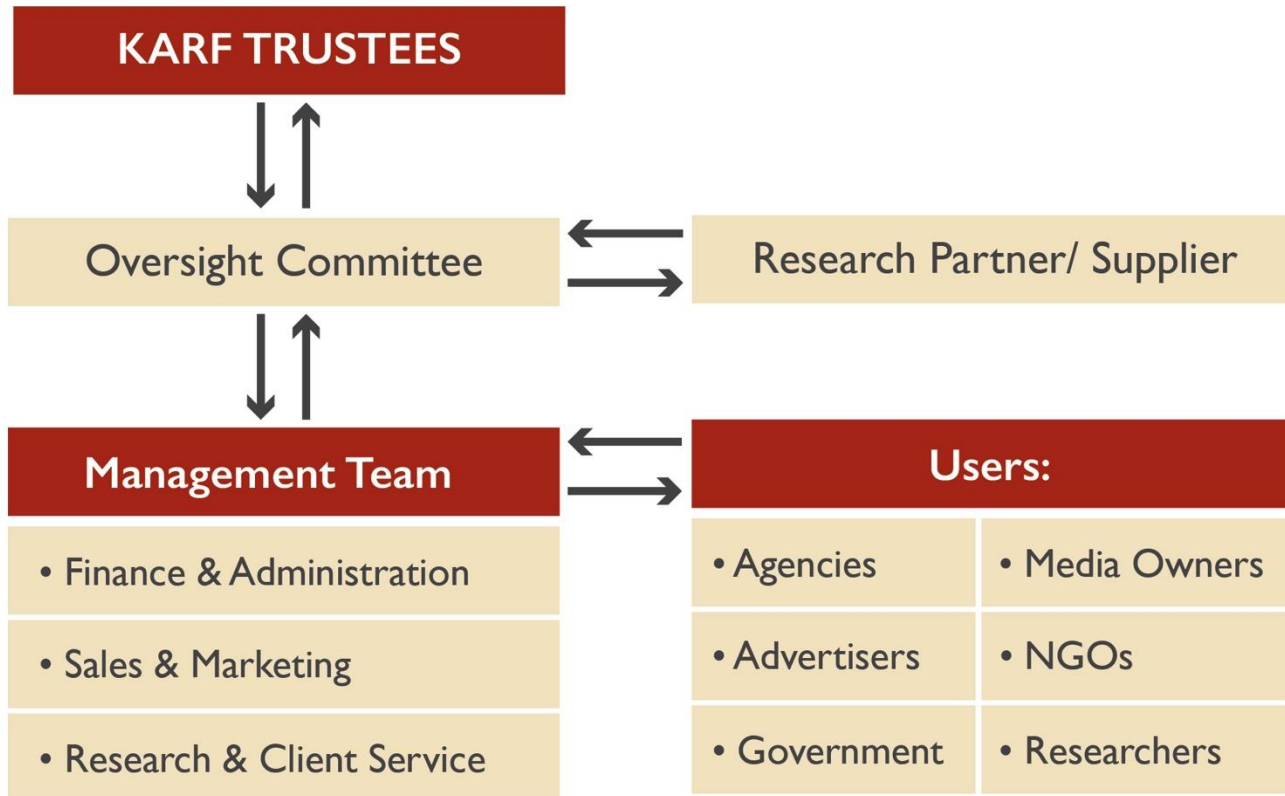
KENYA AUDIENCE RESEARCH FOUNDATION

Background Information

Before the founding of KARF in 2007 the industry did not have an **authoritative and common source** of audience measurement data to collectively guide:

- **Advertisers** and their agencies in making decisions about their media expenditure. In making such decisions, you need to know which media channels deliver to your target audiences most effectively and efficiently. Further, advertisers use the data to evaluate the success of their media plans.
- For many **broadcasters** their primary source of revenue is derived from selling advertising in and around the programmes they transmit. Broadcasters use this data to set their rate cards objectively, market their media space and monitor the performance of their various programmes.

Structure



Industry Oversight Committee

KARF Trustees Chairperson - Annette Martyres

Industry Body		Name	Designation
1.	Association of Practitioners in Advertising	Lenny Ng'ang'a	Chairperson
2.	Communications Authority of Kenya	Christopher Wambua	Multimedia Content & Innovation
3.	Marketing Society of Kenya	Waithera Ng'ang'a	Chief Executive Officer
4.	Media Owners Association	Ian Fernandez	MOA Representative
5.	Pan Africa Media Research Organization	Joe Otin	Vice President
6.	Mobile Marketing Association of East Africa	Frank Maina	Chairperson
7.	Data Users in General	George Luttah	Director Group M
8.	Africa Centre of Applied Research	George Waititu	KARF Technical Advisor
9.	Africa Centre of Applied Research	Vivien Marles	KARF Technical Advisor



MEDIA AUDIENCES IN KENYA **Where are they?**

Establishment Survey 2015

Presented by George Waititu & Vivien Marles

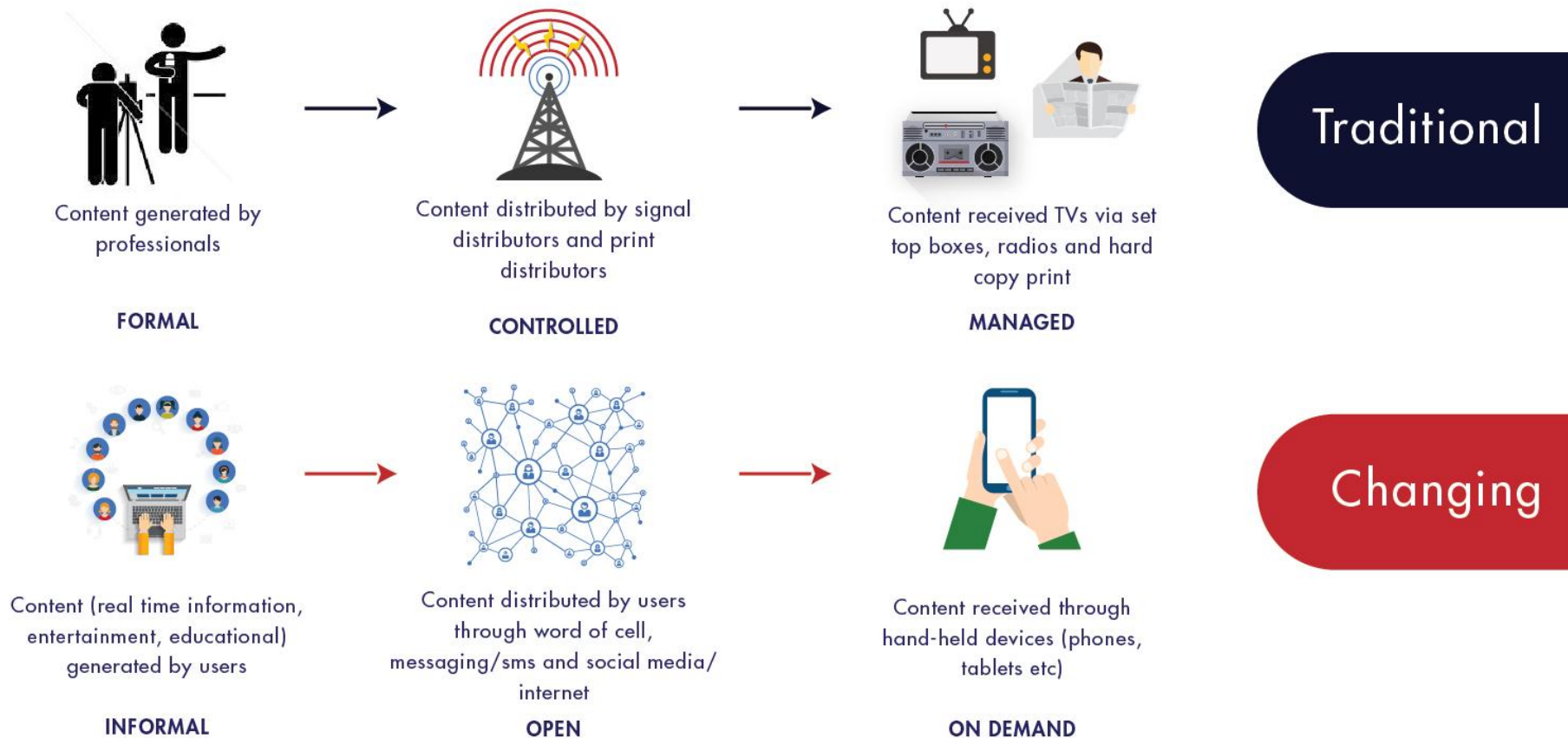
Kenya Audience Research Foundation

2015 ESTABLISHMENT SURVEY

- To establish the current media usage levels among the population (12+) and to provide a solid basis upon which regular tracking of media audiences will be based.
- A nationally representative sample of 4,316 conducted in home through a face to face survey.
- Conducted by KARF in February/ March 2015

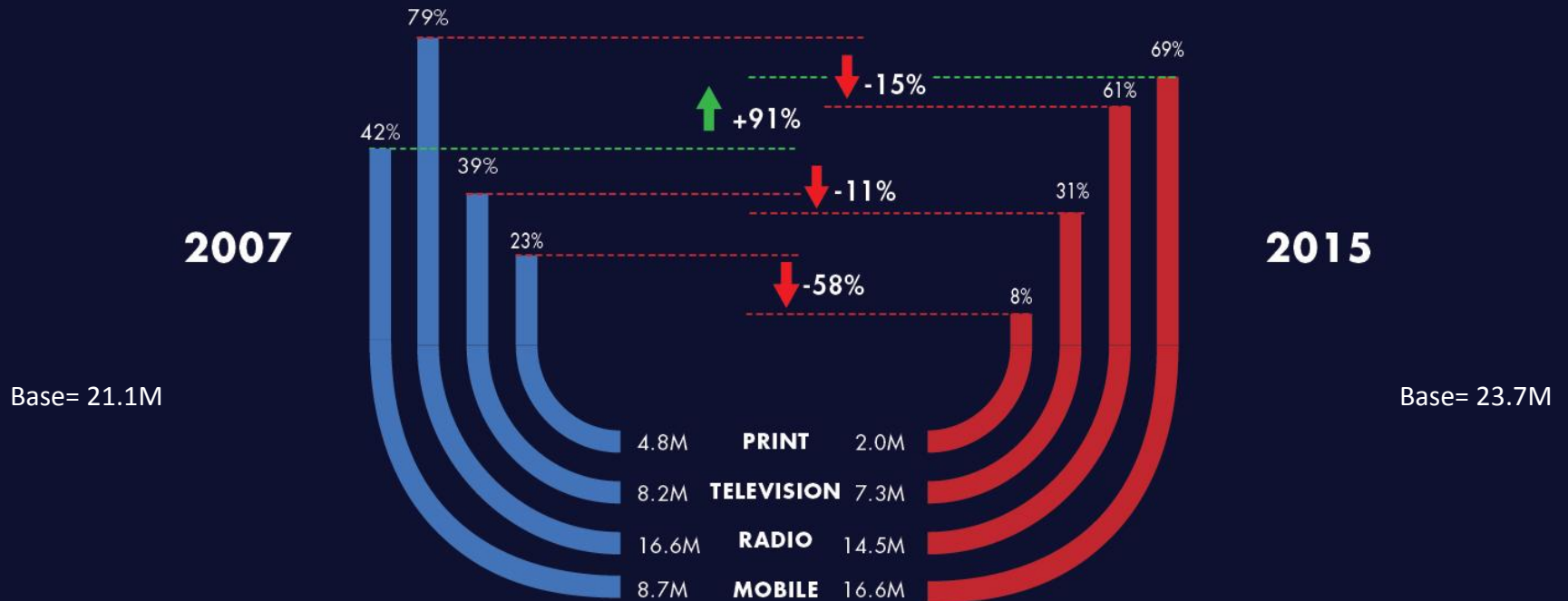
This is the first media establishment survey since 2007. It provides up to date media universe data and forms the parameters upon which the ongoing tracking study will be based. The timing of the survey allows for TV audience estimates before, immediately after and a month after the digital migration.

THE CHANGING MEDIA ECOSYSTEM



This survey reveals the extent to which the familiar, traditional, linear media ecosystem is transitioning & evolving into an environment where information & entertainment are available on demand, a world where consumers have many more choices & can exercise more control.

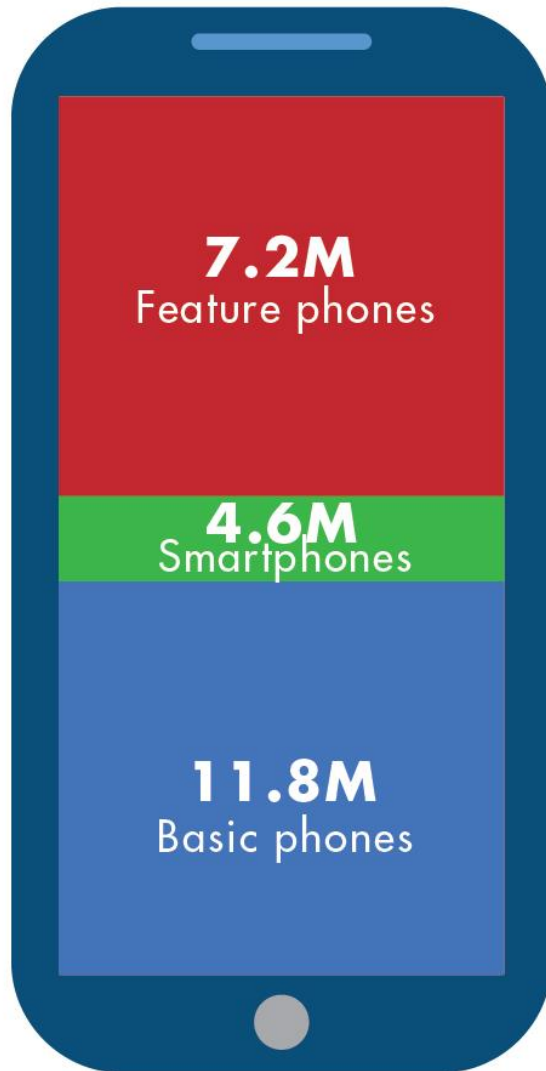
DAILY REACH



Since the last full Establishment Survey national daily reach of traditional media has shrunk. In contrast mobile usage has almost doubled. This is despite increase in TV households, growth in population and rise in living standards.

Access to media via mobile devices seems to be impacting on regular use of traditional media.

PENETRATION OF MOBILE PHONES



Cellphones 64% growth

7M

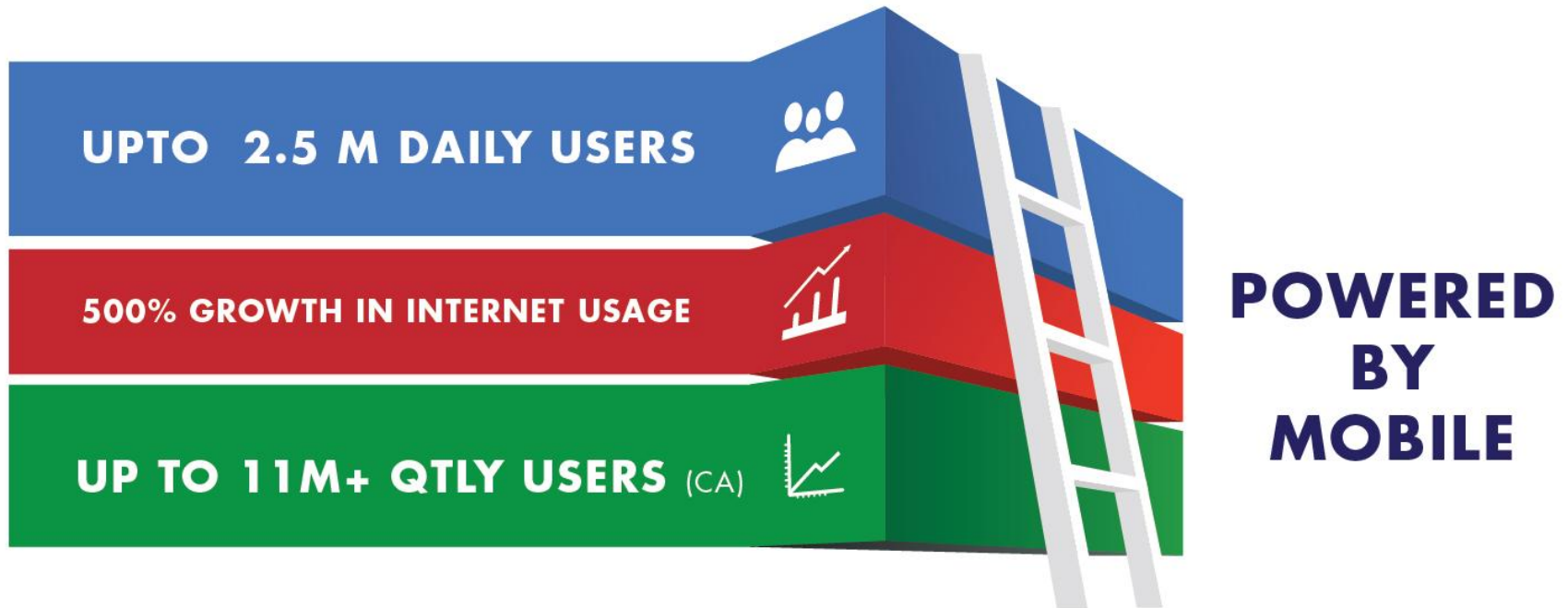
CELLPHONE HOUSEHOLDS

3.4M

TELEVISION HOUSEHOLDS

There are now twice as many households with cellphones than television sets. Additionally, there are 11.8M internet enabled phones in the country—a figure that is increasing rapidly as the cost of handsets & internet access continues to drop.











INTERNET USERS



The survey revealed that approx 2.5million adults use internet on daily basis. This number has grown by more than 500% since 2007. Data from the Communication Authority show that internet usage is in the region of 11million quarterly.

More than 90% of this internet usage is via mobile phone.

DAILY REACH BY PRINT TITLE

Daily Nation		1.3M	5.0%
The Standard		877K	3.7%
Sunday Nation		858K	3.6%
Saturday Nation		795K	3.0%
Saturday Standard		546K	2.3%
Sunday Standard		506K	2.0%
Taifa Leo		276K	1.0%
The Star		226K	1.0%
People Daily		213K	1.0%
Nairobiian		147K	1.0%

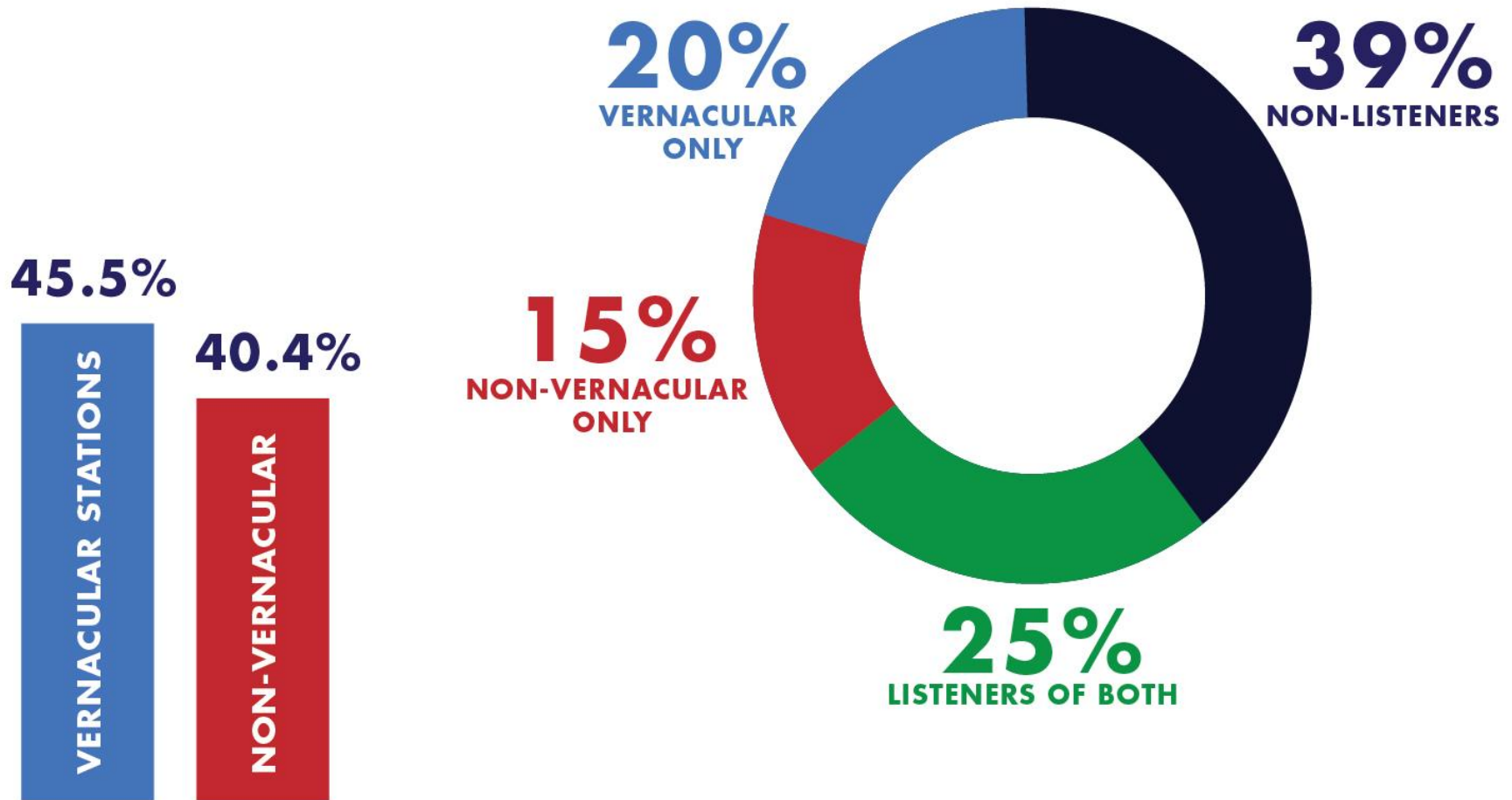
The Daily Nation reaches around 1.3M adults per day, representing 5% of the adult population.

The Standard reaches 877,000 daily, just ahead of the Sunday & Saturday Nation.

Base= Daily Newspaper Readers

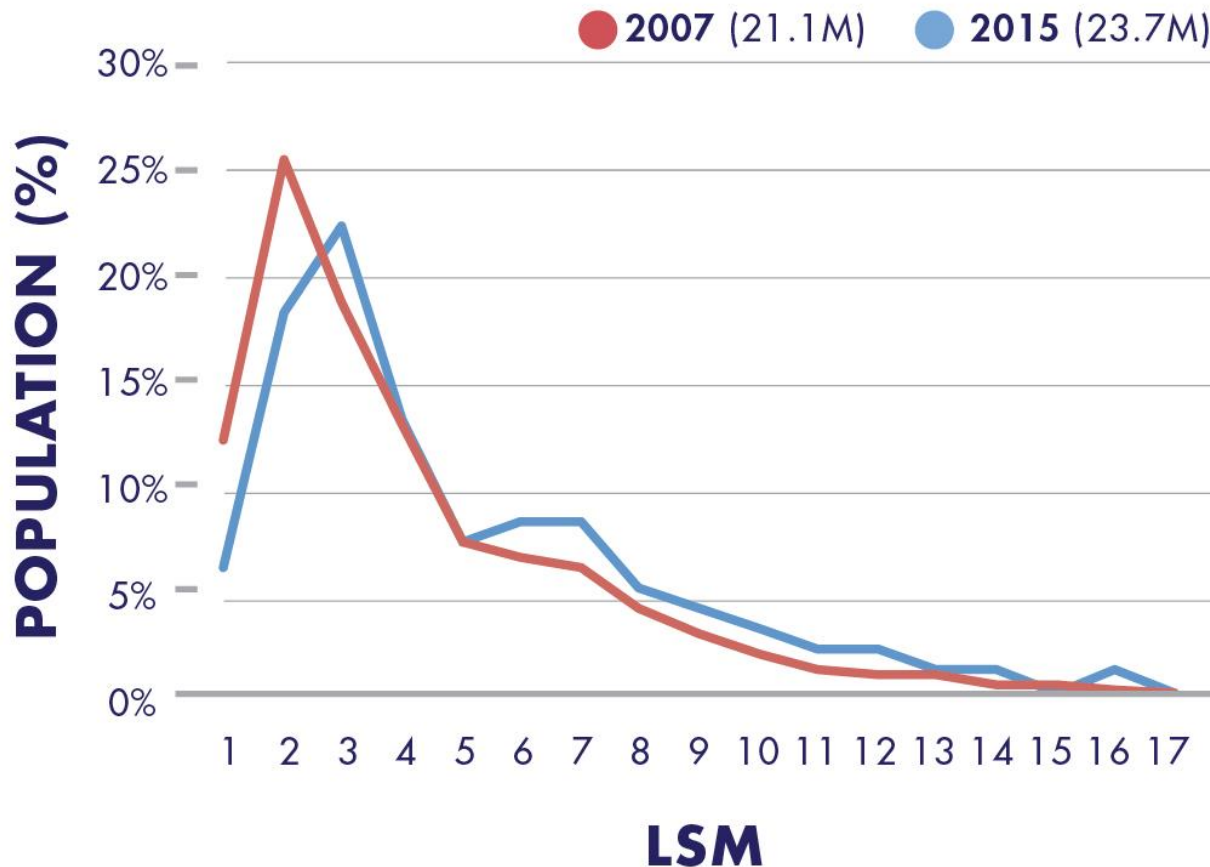
VERNACULAR STILL REIGNS

Vernacular continues to shape the radio landscape. As many as 45% of daily radio listeners tune into vernacular stations and 1-in-5 listen **only** to vernacular stations



Base=23.7M

IMPROVED LIVING STANDARDS



LSM 1-2 **-15%**

LSM 4-6 **+27%**

LSM 7-9 **+25%**

LSM 10+ **+43%**

LSM 1-2 shrunk by 15% since 2007 as their living standards improved. Conversely, there was growth in the higher LSM groups. While LSM 10+ grew significantly, the actual numbers making up that group remain very small. Movement in the LSM groups is not only a function of improved living standards but also a function of population growth.

Next steps...

- Refreshed LSM Input variables to form a new 2015 Baseline
- New technology based on-going tracking study for overnight ratings (TV and Radio) and daily reading (Newspapers) with weekly and monthly aggregates
- Fixed panel of 3,000 P7D media consumers
- Dashboard reporting and analysis
- Analysis available for TV, radio and print: media topographies, age, gender, LSM, weight of viewing and listening, cross media
- Planning and optimization software

Middle Class?

- Monthly h/h income: 55% less than 10,000 ksh
- Built-in kitchen sink: 11%
- Car ownership: 5%
- Refrigerator: 7%

How to be a Middle Class Kenyan

(Maleperspective Nation 18/06/15)

- Drink beer from long necked bottles – green for preference
- Eat salads – Greek for preference
- Get on Instagram
- Name drop
- Spend at least half your income on rent
- Get a luxury car
- Show off
- Show you are very happy, everyday, always
- Raise your kids on social media
- Make a fuss about your exercise regime
- Take selfies with celebrities
- Take photos of the plane as you board
- Send kids to schools on nice roads in leafy suburbs