Kenya Media Landscape Report

July 2019

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Contents

Executive Summary

Media Availability, Access and Audiences

Mobile Subscriptions and Financial Transactions

Advertising Expenditure

Editorial Content: News & Editorial Analysis

Internet Access and Digital Content

Advertisers' Perceptions

The Future: Technology for Audience Measurement

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Executive Summary

Key Insights on
Kenya Media Landscape Report

Introduction

Over the last five years, the Kenyan media landscape has undergone several significant transformations. In 2015, the media industry undertook the digital migration, a process where broadcasting services offered on analogue technology were converted and replaced with digital-based networks. Specifically, all TV stations migrated from analogue to digital broadcast. As a result of this move, Kenyans had to either purchase a TV fitted with a digital tuner or purchase a special decoder known as a Set-Top Box to connect existing analogue TVs in order to continue watching television. Another significant development that impacted on the media landscape is the internet, whose access amongst the general population has increased. In addition, there has been a substantial improvement in the internet speeds and a reduction in costs. These factors have changed the way Kenyans fundamentally consume media and subsequently led to the proliferation of digital media.

It is against that background that Reelforge and TIFA Research have compiled a Kenya Media Landscape (KML) Report that examines the media landscape in Kenya. The report covers the supply and demand of TV, radio and online media. The report further provides an analysis of the news/editorial themes published on print, TV, radio and online media. In recognition that advertising drives the commercial nature of media, the report provides an overview of advertising expenditure.

Kenya Media Landscape: Key Insights

1 **Digital migration increased coverage of TV:** It is now five years since the digital migration and during this period, there have been significant changes in the media landscape. The migration gave rise to an increase in both the population coverage and the number of TV channels available to viewers. Several factors contributed to these gains – firstly, is the liberalization of the distribution and supply of set-top boxes that left the supply of set-top boxes in the hands of the private sector. Competition amongst STBs suppliers drove down prices. Secondly, reduced taxation and fees and allowing market forces to drive the supply of set-top boxes stimulates the production and import of STBs and this significantly reduced the cost of STBs to end users. In less than three years, the number of STBs in Kenya increased by approximately 465%, causing the price of STBs to decrease by 80% or even more in other cases.

2 **Upsurge in internet access a key factor:** Internet is another noteworthy factor influencing the supply and demand of media in Kenya. The number of mobile internet users has recorded enormous growth over the last five years. Growth in data subscribers could be attributed to the massive investments by mobile operators and Internet Service Providers into base stations and the last mile fibre optic transmission links to support the increasing bandwidth demand in the country. As a result, Kenyans are using their mobile phones data services to access radio, TV and print content on-demand. The internet also facilitates on-demand access to content, anytime, anywhere on any digital device and has resulted in what is now referred to as the democratization of information.

3 **Advertising key source of revenue:** Advertising expenditure remains the primary source of revenue for the media. With increased competition and declining advertising spends on traditional media, it is time for media enterprises to develop business models that will diversify streams.

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Kenya Media Landscape: Key Insights...(continued)

4 **Audience Research:** A critical component for effective and efficient advertising spends is sound audience research. The industry is in dire need of a gold standard audience research data for media planning, and the industry-led solution is required. The ideal research tool is passive audience methodolgy

5 **Challenges facing media :** This report is written against the backdrop of the media industry facing challenges that include the prevalence of fake news that is eroding the credibility of the media. There is also increased competition from global digital media platforms such video on demand and OTTs (as Netflix, Showmax, etc.). With the growth of digital media, worldwide advertising platforms such as Google and Facebook are also eating into Kenya's advertising market share. All these challenges coupled with delayed payments from advertisers paints a bleak picture on the Kenyan media landscape.

6 **Media as a powerful tool:** The media, in whatever form it is accessed, remains a powerful medium of communication. The role of the media is to inform, educate and entertain. Various research shows media remains the most trusted information source in Kenya and therefore can make a positive contribution to the country. The media is under compulsion to develop appropriate content that promotes national development and social cohesion.

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Conclusion

Audiences in Kenya are interacting with multiple media platforms and the challenge at hand for media houses is to identify innovative ways of appealing to them. Increased competition coupled with declining advertising spends points to the fact that it is imperative for media enterprises to develop business models that will diversify their revenue streams

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Media Availability, Access and Audiences

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Media Availability

The number of TV stations increased significantly between 2014 and 2015. This is attributed to the digital migration that contributed to increased investments in digital TV media. Besides, the number of online news sites increased significantly. Increase on TV is driven by availability of more stations and also the fact that this media is consumed on various platforms – from the set-top-box and online.
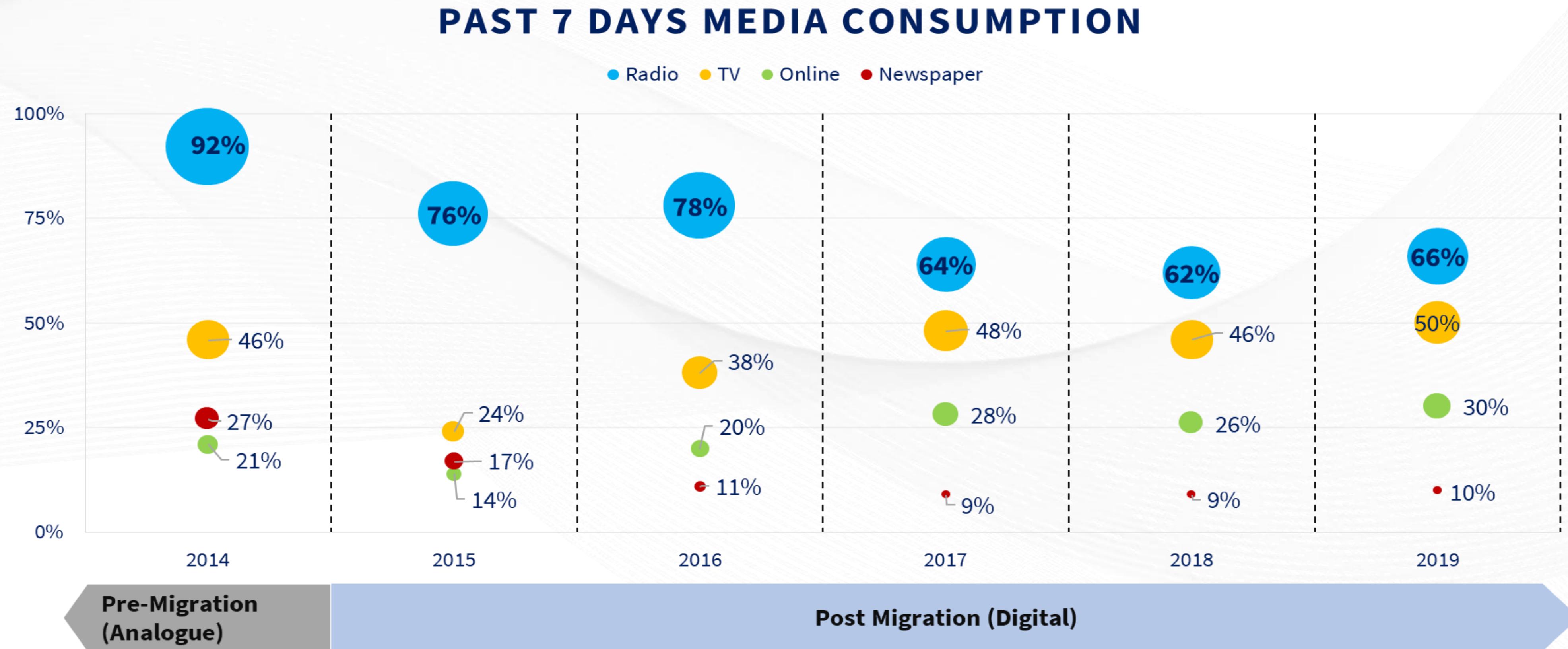

Media Brands in Kenya

Legend: ■ Radio ■ Television ■ Newspapers ■ Online new sites

Year	Radio	Television	Newspapers	Online new sites
2015	120	9	9	
2016	139	63	9	
2017	178	66	9	
2018	169	67	9	22
2019	173	68	9	22

Pre-migration (analogue): 2015
Post Migration (digital): 2016–2019
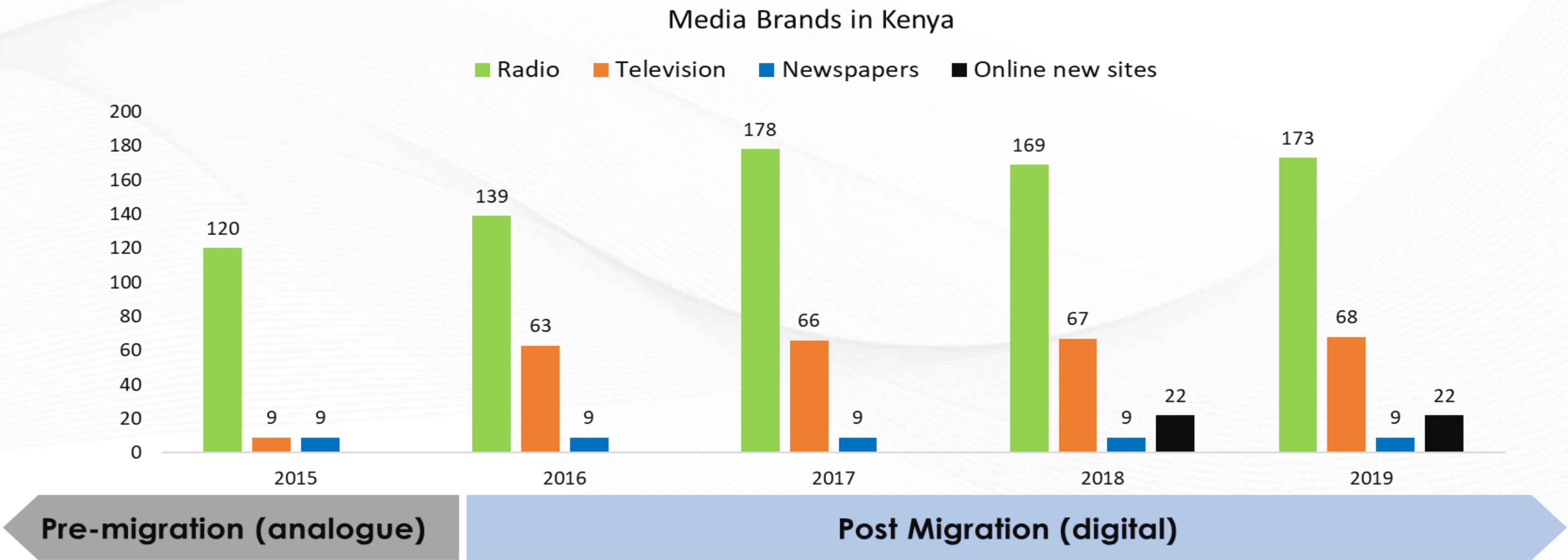
Source: Communications Authority (radio, tv and print data)
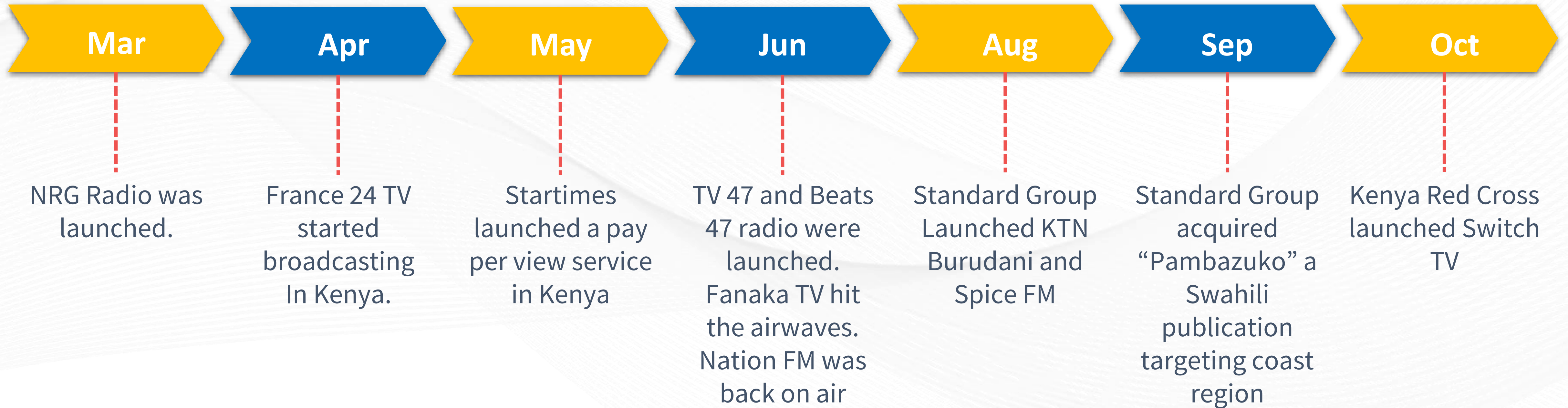
Media Consumption Habits

Before the digital migration, radio had the highest proportion of audience in Kenya. However, the audience for radio has declined gradually from 92% in 2017 to 66% in 2019. Regardless of the decline, radio is still the most consumed media source in the country. On the other hand, TV and online audiences have increased slightly from 50% and 30% respectively over the same period. Increase on TV is driven by availability of more stations and also that this media is consumed on various platforms – from the set-top-box and online .

PAST 7 DAYS MEDIA CONSUMPTION

● Radio ● TV ● Online ● Newspaper

	2014	2015	2016	2017	2018	2019
Radio	92%	76%	78%	64%	62%	66%
TV	46%	24%	38%	48%	46%	50%
Online	21%	17%	20%	28%	26%	30%
Newspaper	27%	14%	11%	9%	9%	10%

Pre-Migration (Analogue) — 2014

Post Migration (Digital)

Source: KARF

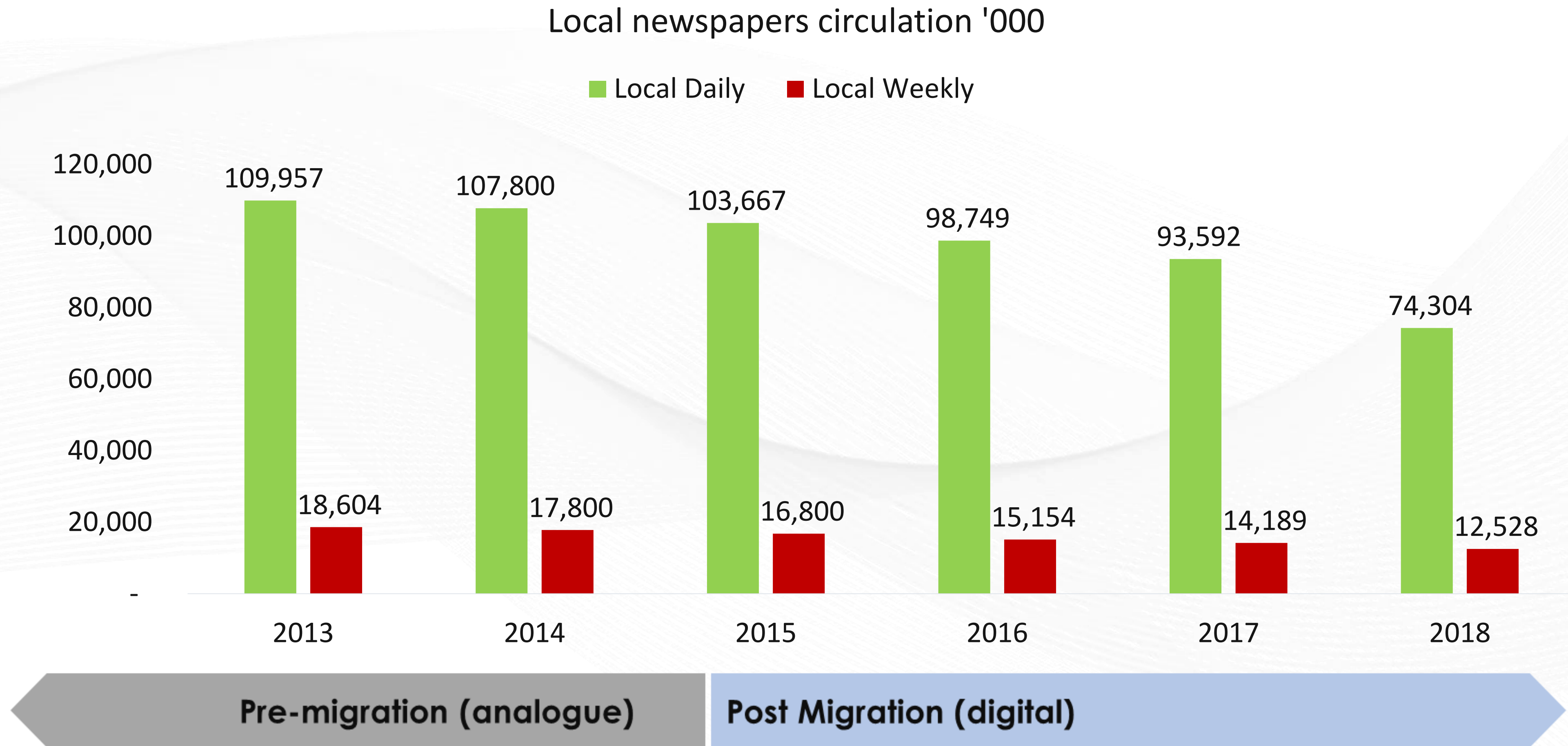reelforge | Building Brands

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Major Media Developments in 2018

Competition in media will increase as new stations continue to be launched. In 2018, there were a number of new TV and radio stations in most of the months throughout the year. The stations launched tend to focus on a target audience that might seem 'left out' by the existing media stations.

Mar	Apr	May	Jun	Aug	Sep	Oct
NRG Radio was launched.	France 24 TV started broadcasting In Kenya.	Startimes launched a pay per view service in Kenya	TV 47 and Beats 47 radio were launched. Fanaka TV hit the airwaves. Nation FM was back on air	Standard Group Launched KTN Burudani and Spice FM	Standard Group acquired "Pambazuko" a Swahili publication targeting coast region	Kenya Red Cross launched Switch TV

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Newspaper Circulation

The daily newspaper circulation has been on the decline. The local dailies recorded a 33% decline in circulation between 2013 and 2018.

Local newspapers circulation '000

■ Local Daily   ■ Local Weekly

Year	Local Daily	Local Weekly
2013	109,957	18,604
2014	107,800	17,800
2015	103,667	16,800
2016	98,749	15,154
2017	93,592	14,189
2018	74,304	12,528

Pre-migration (analogue) | Post Migration (digital)

Source: KNBS Economic Survey 2018 and interviews with sector players

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Mobile Subscriptions and Financial Transactions
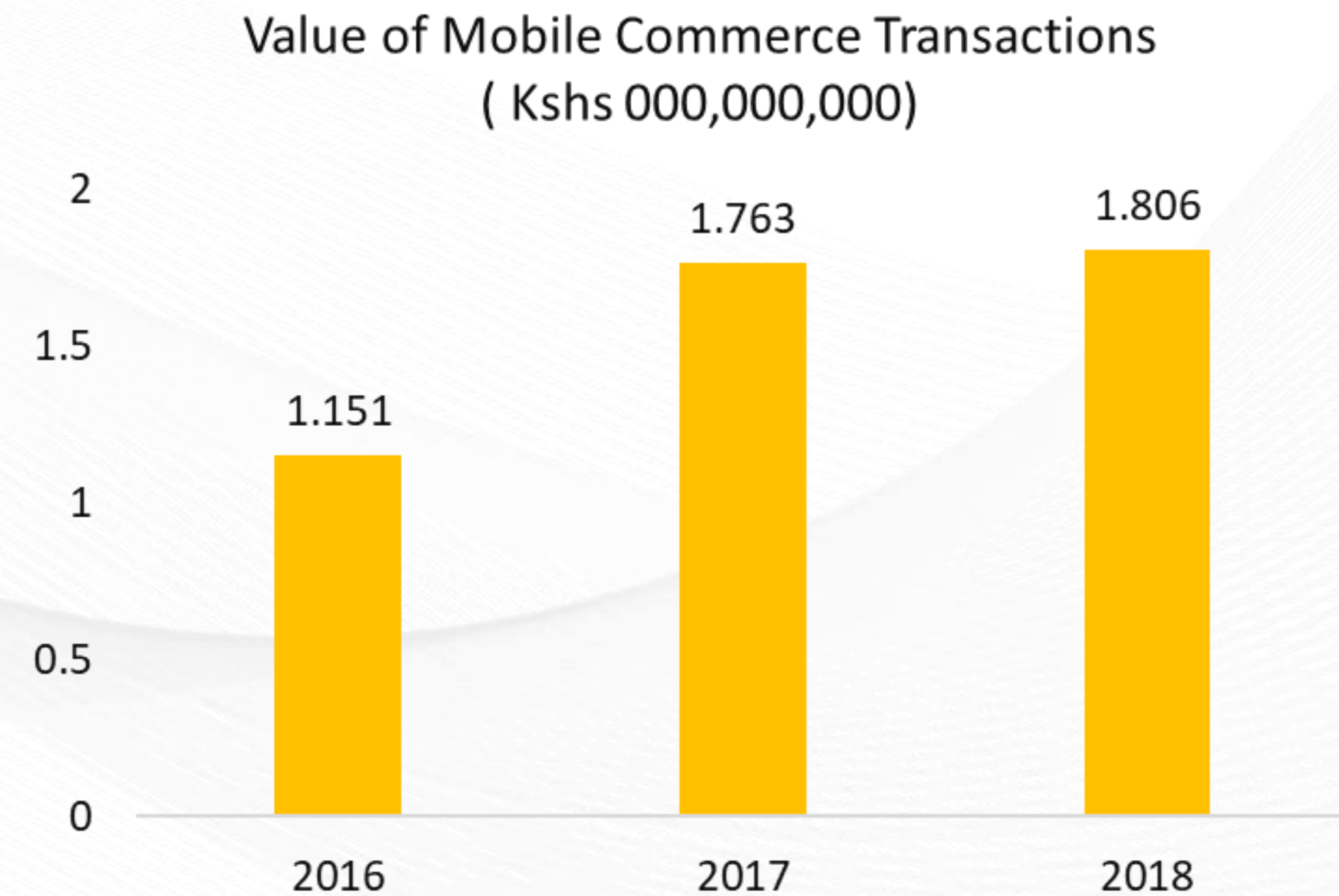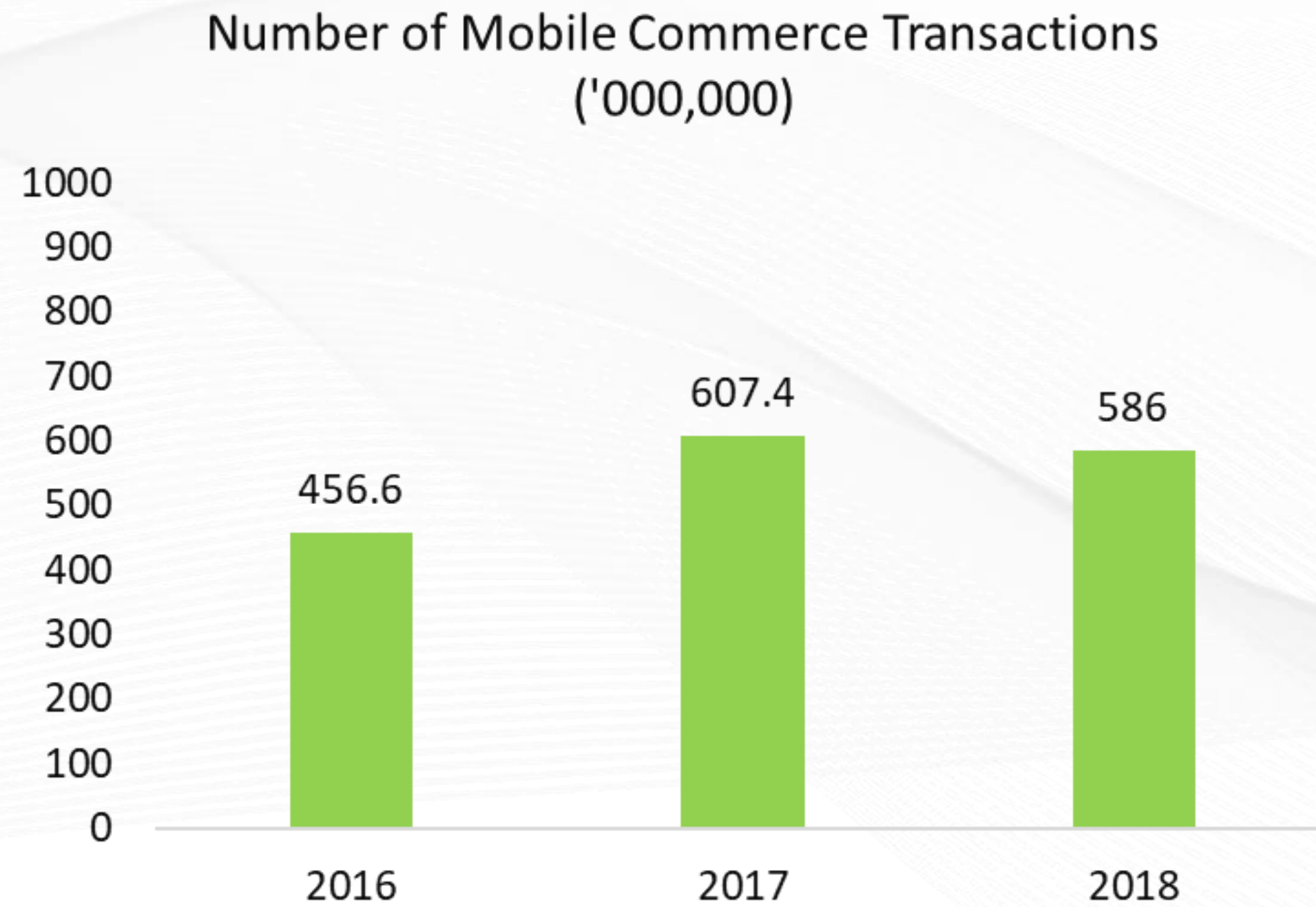
Mobile and Internet Subscriptions

The number of active mobile subscriptions in the country currently stands at 49.5 million. These numbers translate to a mobile penetration level of 106.2%. The penetration level of more than 100 per cent is attributed to the multiple SIM cards ownership in the country. Kenya National Bureau of Statistics (KNBS) in its report 2018 indicated that at least 30% of Kenyans owned more than one SIM card. Internet subscriptions in the country have grown immensely since 2014 with the highest growth (more than 10%) of subscribers being between 2017 and 2018.
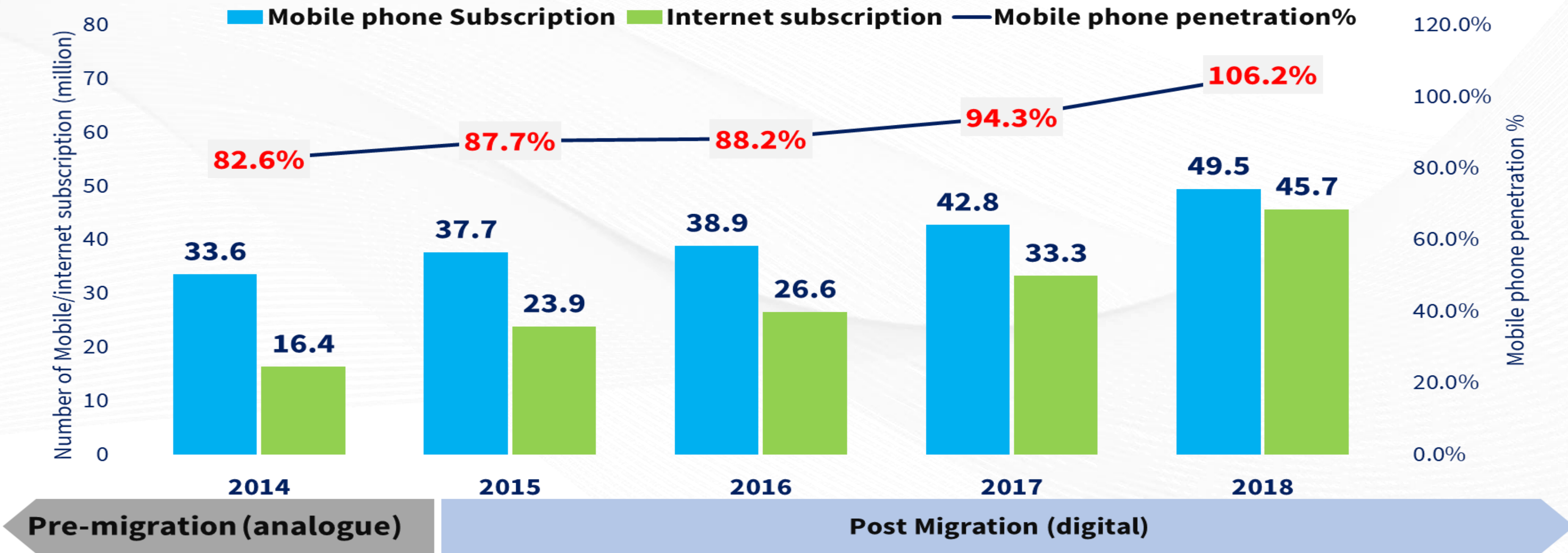
Source: Communications Authority

Mobile Commerce Transactions

The number of mobile money transactions for 2018 stand at 586million. The value of mobile commerce transactions increased from 1.763trillion to 1.806 trillion. Although the number of transactions declined between 2017 and 2018, the value increased during the same period. Therefore, the per capita mobile transactions increased during this period.

Number of Mobile Commerce Transactions ('000,000)

Year	Value
2016	456.6
2017	607.4
2018	586

Value of Mobile Commerce Transactions (Kshs 000,000,000)

Year	Value
2016	1.151
2017	1.763
2018	1.806

Source: Communications Authority

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Advertising Expenditure

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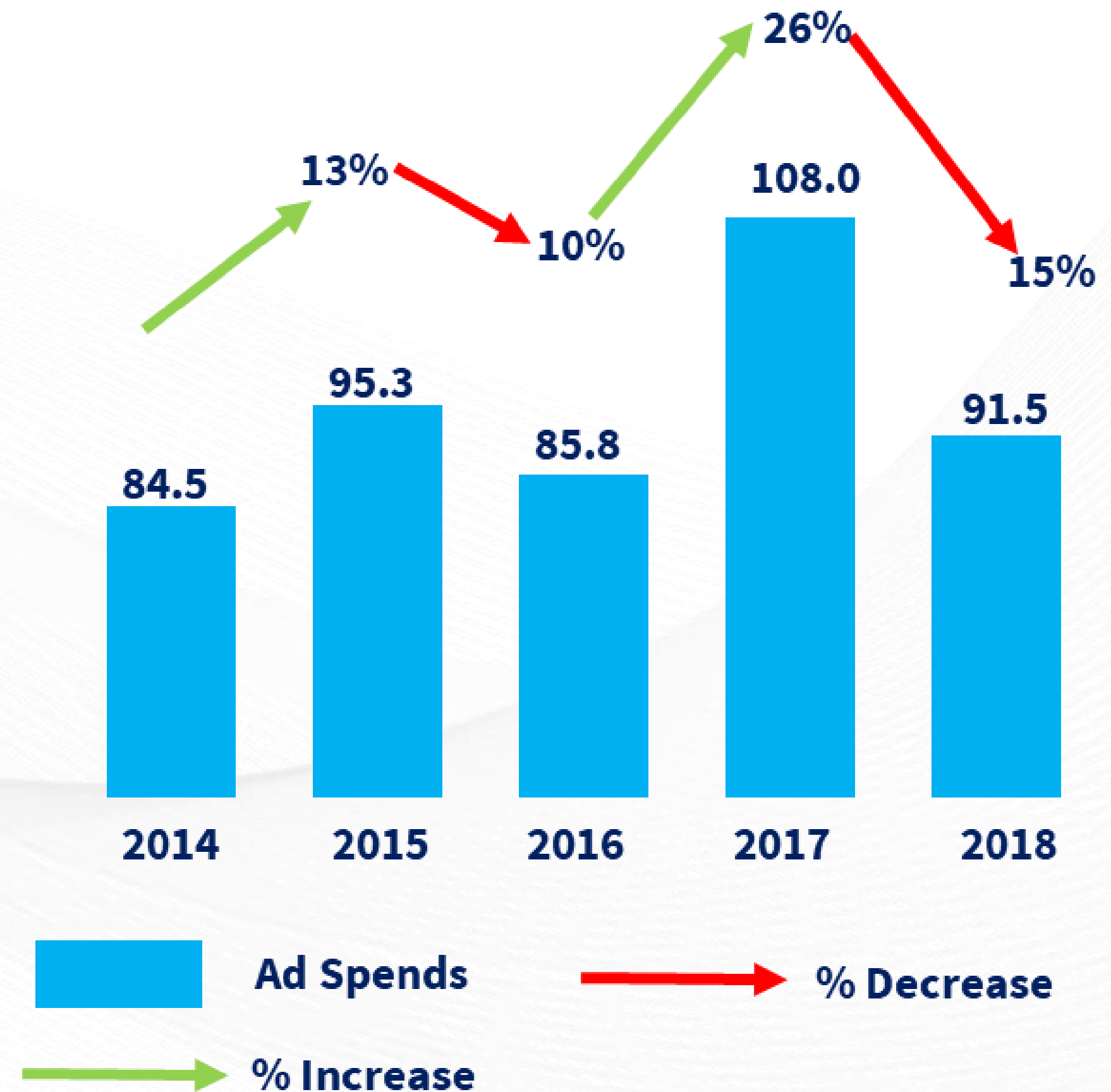
Total Advertising Spends – Radio, TV & Print

Radio is currently the most utilized medium for advertising mainly attributed to the large audience it attracts compared to TV and print as well as the high number of free to air stations available. 2017 had the highest advertising spends over the years, this can be attributed to campaign advertising by political parties.
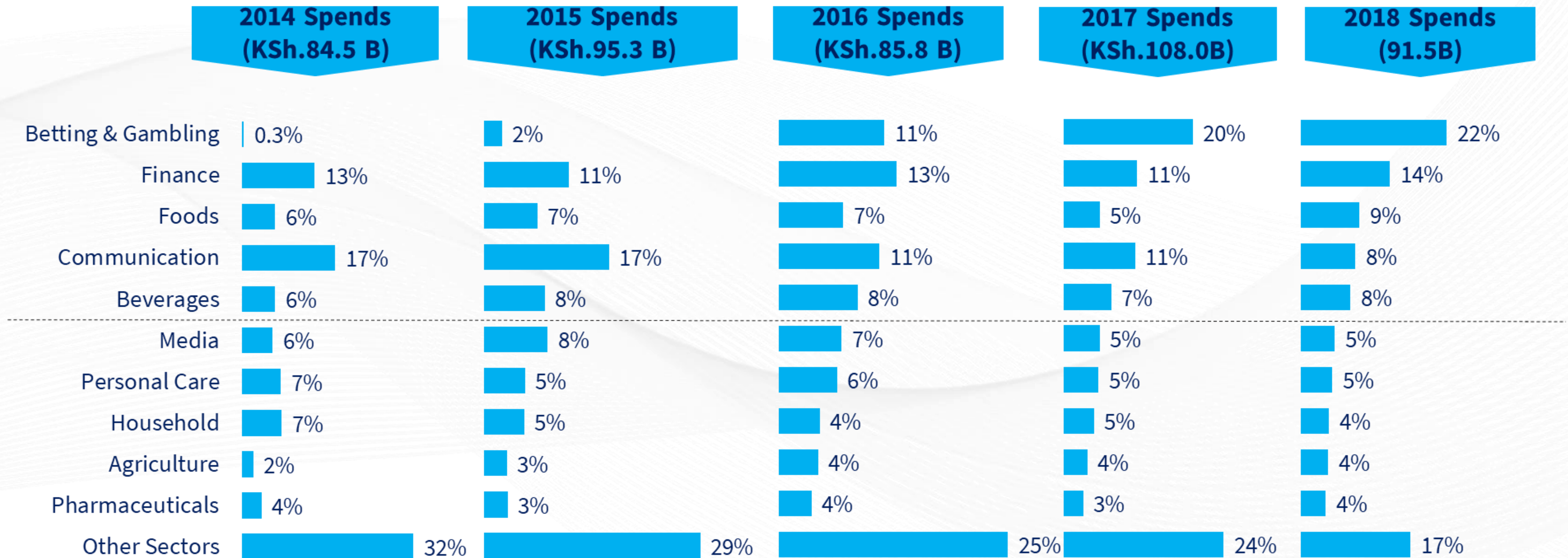

Advertising spends by year (Billions)

2014: 84.5
2015: 95.3 (13%)
2016: 85.8 (10%)
2017: 108.0 (26%)
2018: 91.5 (15%)

Ad Spends   % Decrease
% Increase

Source: Reelforge

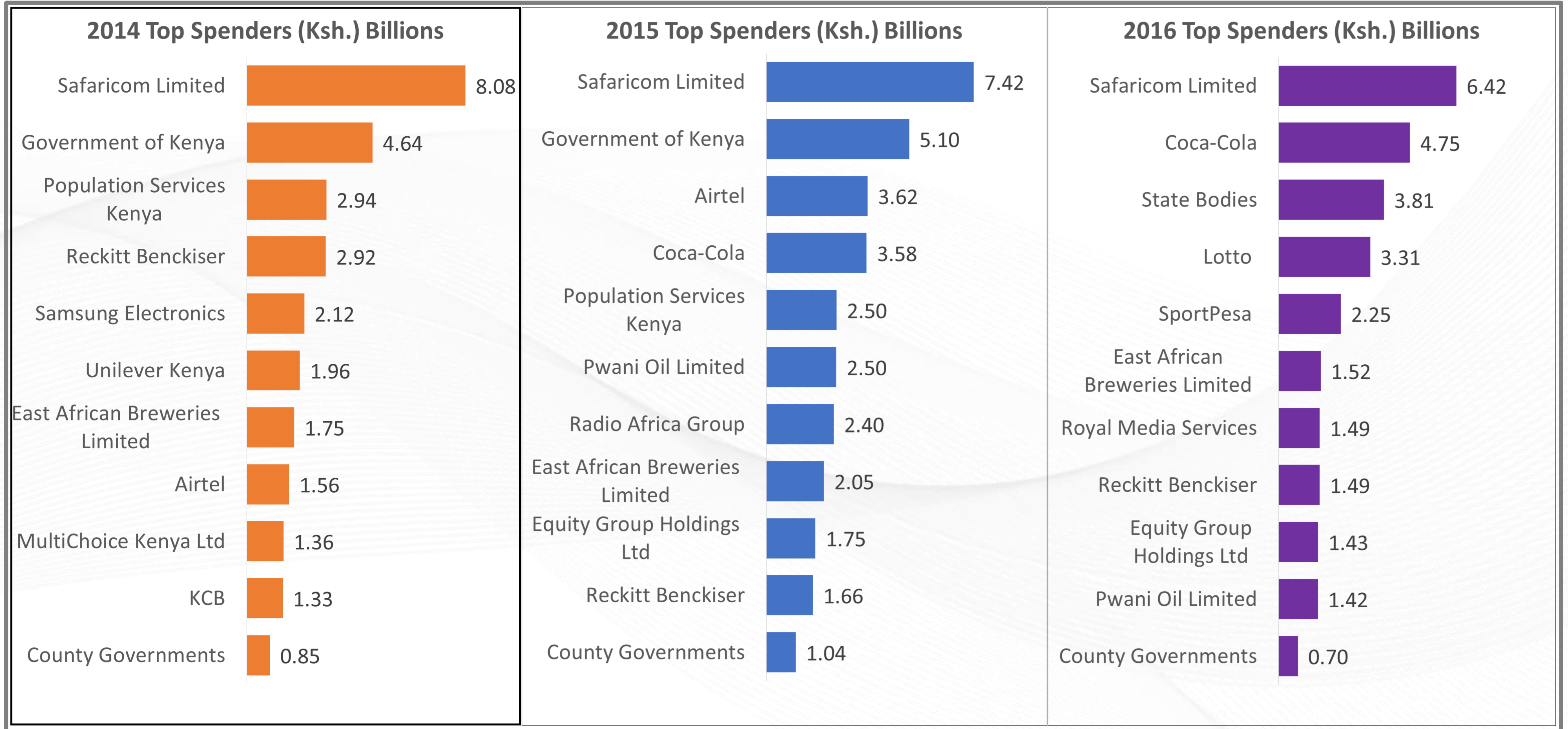# Top Companies Advertising Spends - Radio, TV & Print

A review of advertising spends for 2018 and 2019 shows that the Betting & Gambling sector controls Kenya's advertising sector. This sector's high spends is driven by increased competition which is manifested by a proliferation of new players into the local industry which is deemed to be very lucrative.

	2014 Spends (KSh.84.5 B)	2015 Spends (KSh.95.3 B)	2016 Spends (KSh.85.8 B)	2017 Spends (KSh.108.0B)	2018 Spends (91.5B)
Betting & Gambling	0.3%	2%	11%	20%	22%
Finance	13%	11%	13%	11%	14%
Foods	6%	7%	7%	5%	9%
Communication	17%	17%	11%	11%	8%
Beverages	6%	8%	8%	7%	8%
Media	6%	8%	7%	5%	5%
Personal Care	7%	5%	6%	5%	5%
Household	7%	5%	4%	5%	4%
Agriculture	2%	3%	4%	4%	4%
Pharmaceuticals	4%	3%	4%	3%	4%
Other Sectors	32%	29%	25%	24%	17%

Note: These advertising spends are based on station rate cards

Source: Reelforge

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Top Companies Advertising Spends - Radio, TV & Print

2014 Top Spenders (Ksh.) Billions

Company	Spend
Safaricom Limited	8.08
Government of Kenya	4.64
Population Services Kenya	2.94
Reckitt Benckiser	2.92
Samsung Electronics	2.12
Unilever Kenya	1.96
East African Breweries Limited	1.75
Airtel	1.56
MultiChoice Kenya Ltd	1.36
KCB	1.33
County Governments	0.85

2015 Top Spenders (Ksh.) Billions

Company	Spend
Safaricom Limited	7.42
Government of Kenya	5.10
Airtel	3.62
Coca-Cola	3.58
Population Services Kenya	2.50
Pwani Oil Limited	2.50
Radio Africa Group	2.40
East African Breweries Limited	2.05
Equity Group Holdings Ltd	1.75
Reckitt Benckiser	1.66
County Governments	1.04

2016 Top Spenders (Ksh.) Billions

Company	Spend
Safaricom Limited	6.42
Coca-Cola	4.75
State Bodies	3.81
Lotto	3.31
SportPesa	2.25
East African Breweries Limited	1.52
Royal Media Services	1.49
Reckitt Benckiser	1.49
Equity Group Holdings Ltd	1.43
Pwani Oil Limited	1.42
County Governments	0.70

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Source: Reelforge

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Top Companies Advertising Spends - Radio, TV & Print

2017 Top Spenders (Ksh.) Billions

Company	Ksh. Billions
Government of Kenya	8.64
Safaricom Limited	8.12
Lotto	5.61
Tatua	4.65
Coca-Cola	4.30
Pwani Oil Limited	3.47
MultiChoice Kenya Ltd	3.12
Shabiki	2.94
East African Breweries Limited	2.59
Unilever Kenya	2.15

2018 Top Spenders (Ksh.) Billions

Company	Ksh. Billions
Tatua	5.36
Safaricom Limited	4.97
Lotto	4.59
Pwani Oil Limited	4.21
East African Breweries Limited	3.51
Population Services Kenya	3.42
Shabiki	3.16
MultiChoice Kenya Ltd	2.51
Government of Kenya	2.41
Telkom	2.14
County Governments	0.31

H1 2019 Top Spenders* (Ksh.) Billions

Company	Ksh. Billions
Safaricom Limited	9.71
Shabiki	5.45
Viusasa	4.49
Government of Kenya	4.02
Supa 5 (Kenya)	2.80
SportPesa	2.22
Lotto	1.95
KCB	1.93
Reckitt Benckiser	1.86
Tatua	1.65
County Governments	0.43

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Source: Reelforge

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Out of Home Advertising (Nairobi County Only)

EABL was the top OOH advertiser in March with Guinness Stout, Tusker Lite Beer and Senator keg being the company's most advertised brands.
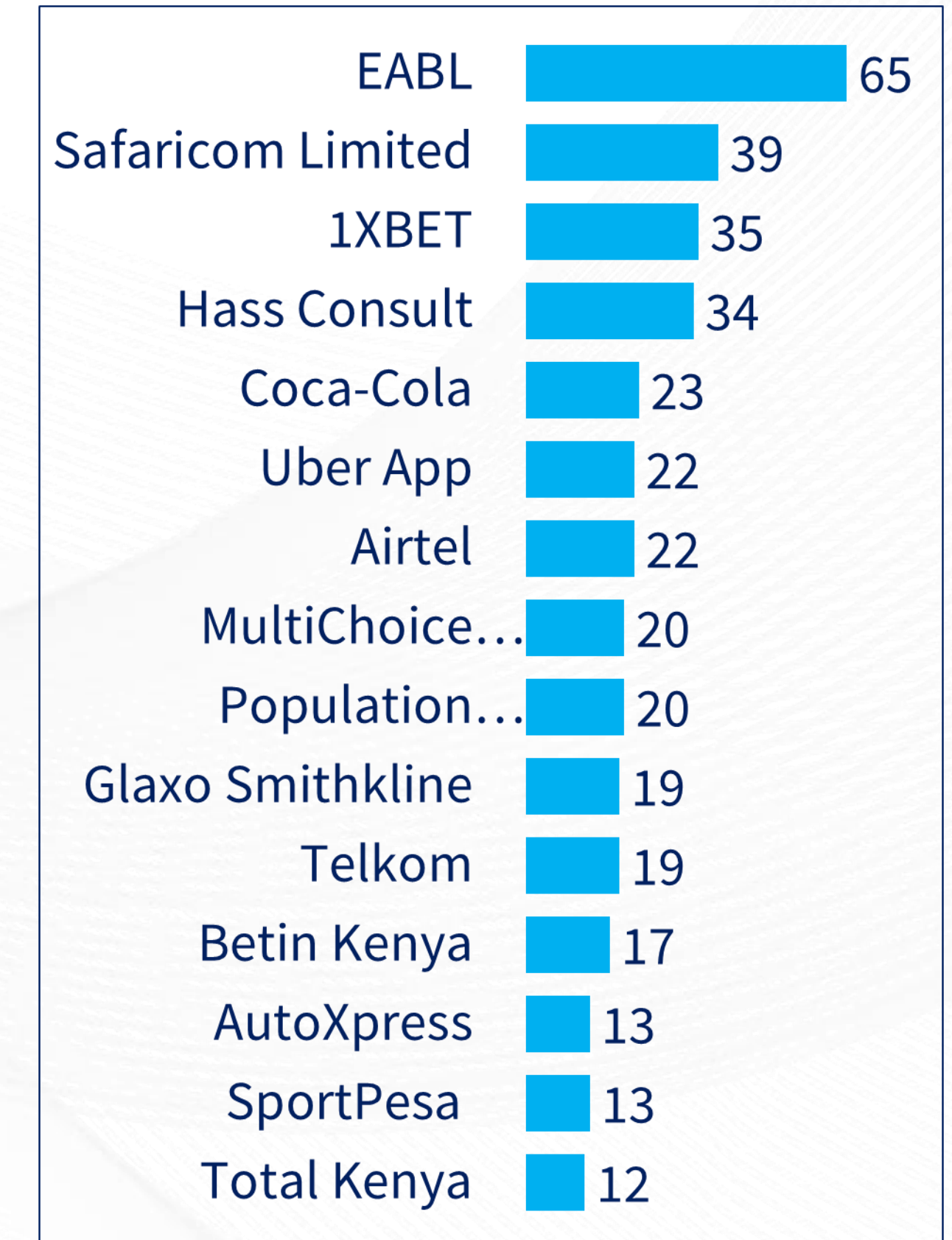
Month on Month Trends

No. of Sites ■   Total Rates ——

Month	No. of Sites	Total Rates
Oct-18	1,433	227
Nov-18	1,586	265
Dec-18	1,550	247
Jan-19	1,523	250
Feb-19	1,566	256
Mar-19	1,868	304
Apr-19	1,740	283
May-19	1,862	284
Jun-19	1,918	290

- EABL, had the highest number of Ad sites in Nairobi influenced by its diversified brands.
- Magnet Ventures owns the highest number of billboards in Nairobi (27%)

Top Billboard Companies by no. of Sites (Jun 2019)

Company	Sites
Magnate Ventures	519
Adsite Ltd	225
Live Ad	133
Firmbridge Ltd	121
Look Media	113
City Clock	76
Consumer Link	59
Alliance Media	44
Think Outdoor	43
A1 Outdoor (K) Ltd	37
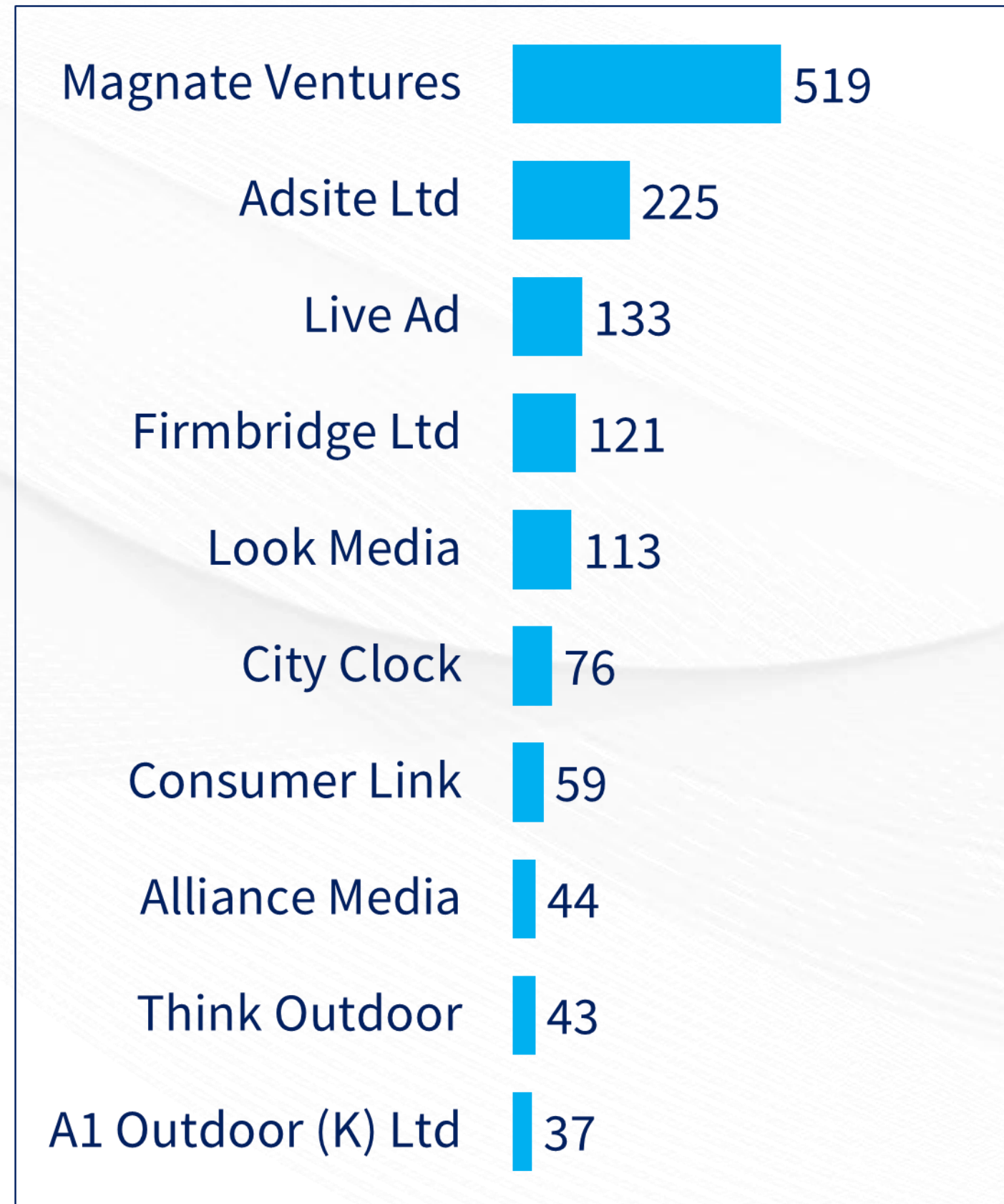
Top Advertisers by no. of Billboards (Jun 2019)

Advertiser	Billboards
EABL	65
Safaricom Limited	39
1XBET	35
Hass Consult	34
Coca-Cola	23
Uber App	22
Airtel	22
MultiChoice…	20
Population…	20
Glaxo Smithkline	19
Telkom	19
Betin Kenya	17
AutoXpress	13
SportPesa	13
Total Kenya	12

Source: Reelforge Media Intelligence

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Advertising Spends (US$ millions) - Digital

There is growth in entertainment and media spends over the years. The internet has always had the highest spends in all the years.
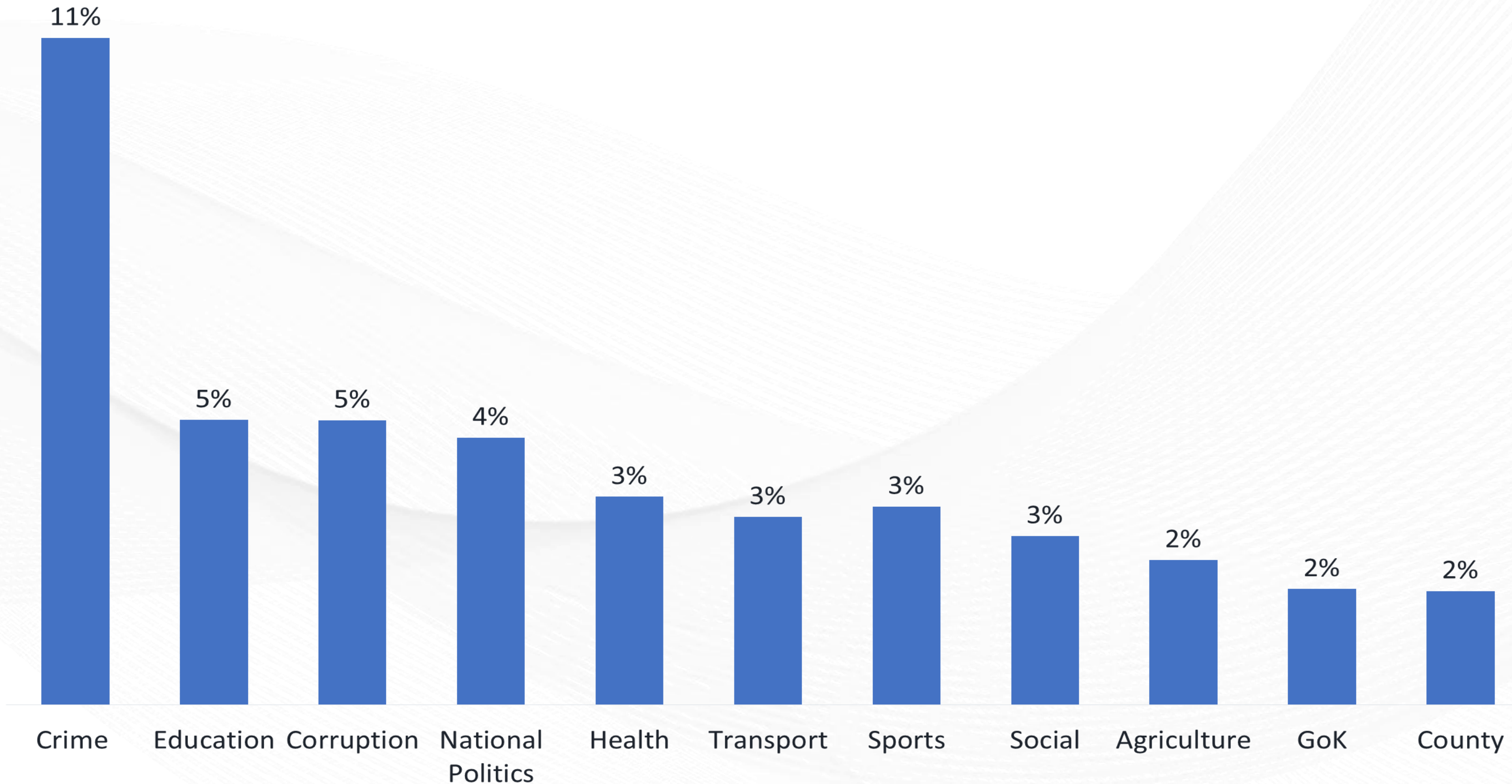
Internet Advertising Spends (US$ millions)

Forecast Data

Year	Spend
2018	1144
2017	984
2016	782
2015	585
2014	459

Historical Data

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Editorial Content:
News & Editorial Analysis

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Top News & Editorial Topics (October 2018 to June 2019)

The news & editorial reporting over the last 8 months has focused predominantly on crimes stories followed by education, corruption and national politics.

Crimes reporting was dominated by stories such as the murders of Sharon Otieno, Monica Kimani, Caroline Mwatha and Ivy Wangeci. The Riverside Drive Terrorist attack in January 2019 received significant coverage in the Kenyan media and this is classified under crime.

On education, the top stories focused on the national examinations, the new curriculum, the threats of the teachers strike and form one students placement.   The media extensively reported on corruption with a critical focus on graft within national and county governments. There was also a focus on national politics with the most news & editorial items focusing on the handshake and 2022 presidential elections.

Topic	%
Crime	11%
Education	5%
Corruption	5%
National Politics	4%
Health	3%
Transport	3%
Sports	3%
Social	3%
Agriculture	2%
GoK	2%
County	2%

Source: TIFA Research

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Top 17 Personalities Coverage in the News (October 2018 to June 2019)

H.E Uhuru Kenyatta was the most mentioned personality in the news at 20% followed by DP William Ruto at 13% and Raila Odinga at 8%. Fred Matiangi and Amina Mohamed are the two cabinet secretaries with the highest coverage while Mike Sonko is the governor with the highest coverage in the media.

Personality	Coverage
Uhuru Kenyatta	20%
William Ruto	13%
Raila Odinga	8%
Fred Matiang'i	5%
Mike Sonko	3%
Amina Mohammed	3%
Musalia Mudavadi	2%
Professor George Magoha	2%
DPP Noordin Haji	2%
Kalonzo Musyoka	2%
DCI George Kinoti	2%
CJ David Maraga	2%
Ferdinand Waititu	2%
Ex IG Boinnet	1%
Okoth Obado	1%
Francis Atwoli	1%
Hassan Joho	1%

Source: TIFA Research

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Top Personalities vs Themes in the News (October 2018 to June 2019)

On crime, CS Fred Matiang'i gets the highest coverage due to his mandate around interior security. His mentions focused on the Dusit Terror Attack and fake gold scam while Uhuru Kenyatta mentions under this theme focused on his remarks around the Dusit Terror Attack and his impersonation. The murder of the human rights activist Caroline Mwatha received 7.91% of the total mentions.

CS Amina Mohammed's mention under education is linked to release of national exams results, students placement and the new curriculum.

In reference to National Politics, DP William Ruto has the highest coverage at 27.88% followed by H.E Uhuru Kenyatta at 20.76% and Raila Odinga at 18.04%. The coverage around these personalities has been on 2022 politics and the handshake.

Crime

Fred Matiang'i	13.46%
Uhuru Kenyatta	9.62%
Okoth Obado	8.36%
Caroline Mwatha	7.91%
DCI George Kinoti	7.62%
Raila Odinga	6.58%
Ivy Wangeci	6.51%
Ex IG Boinnet	4.88%
William Ruto	4.66%
DPP Noordin Haji	2.81%
Moses Wetangula	2.59%
Other	25.00%

Education

Amina Mohammed	37.88%
Professor George Magoha	20.37%
Wilson Sossion	11.80%
Uhuru Kenyatta	8.66%
Peter Tabichi	5.44%
William Ruto	4.98%
Other	10.88%

National Politics

William Ruto	27.88%
Uhuru Kenyatta	20.76%
Raila Odinga	18.04%
Kalonzo Musyoka	3.76%
Aisha Jumwa	3.13%
Musalia Mudavadi	3.11%
David Murathe	3.06%
Other	20.25%

Corruption

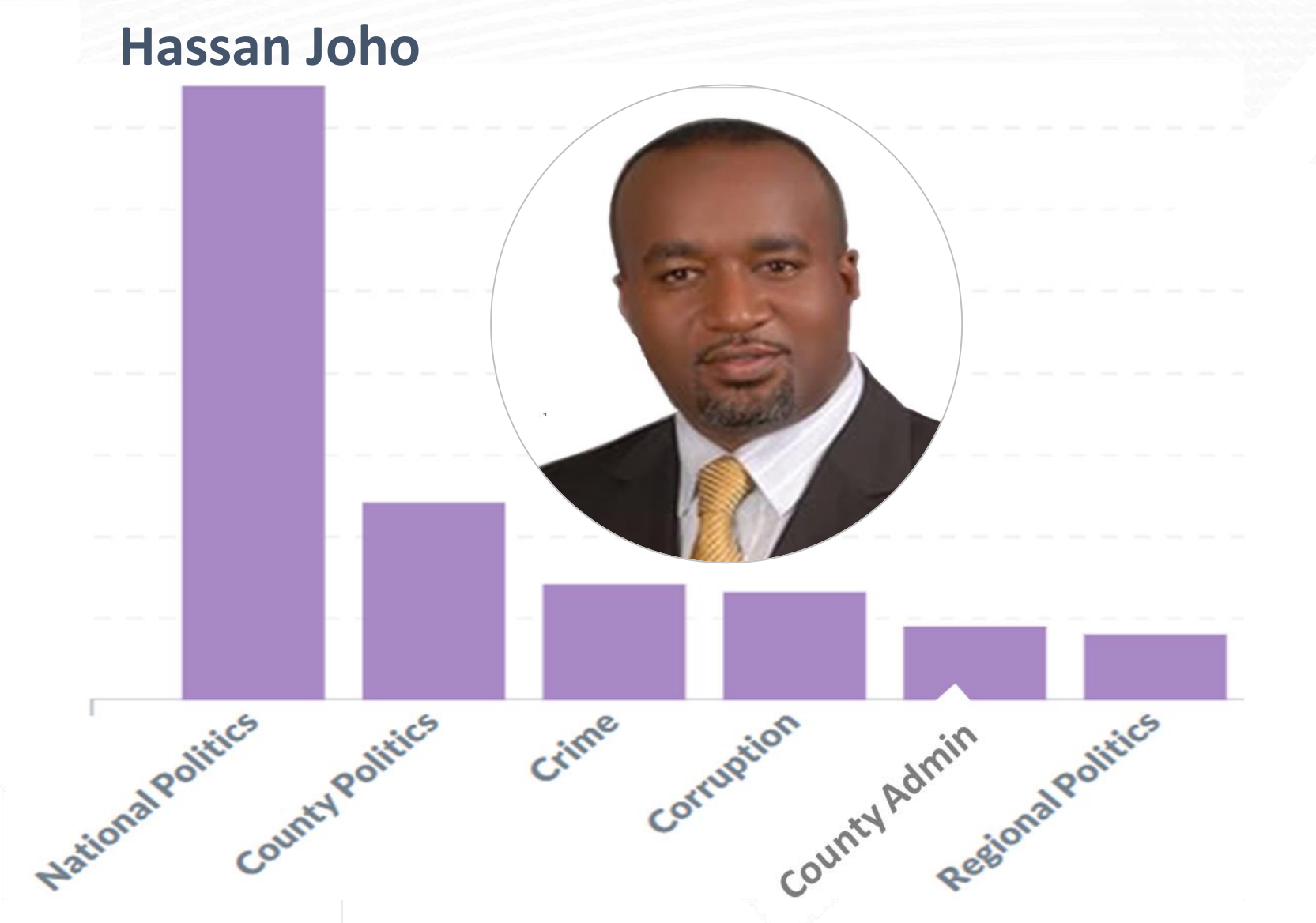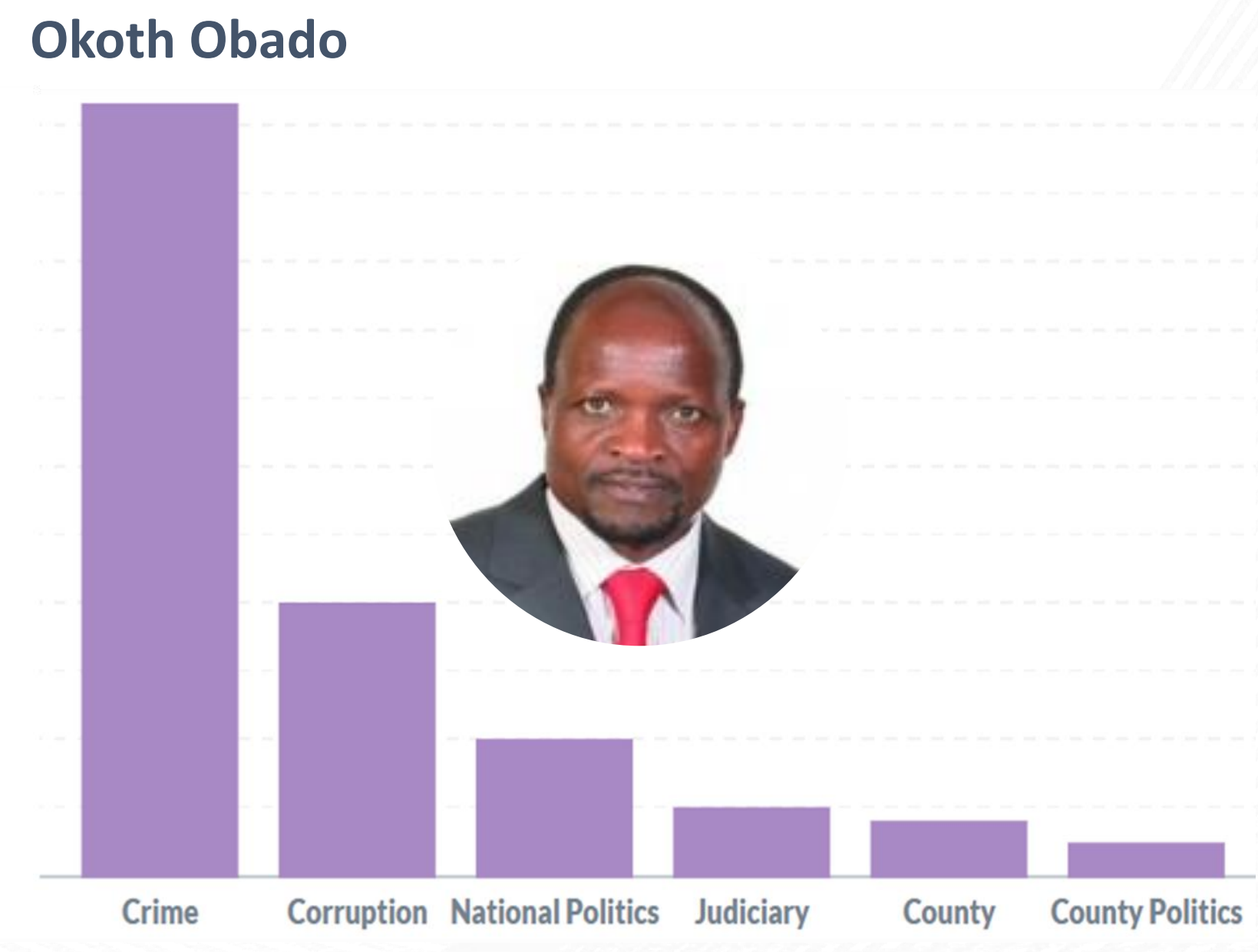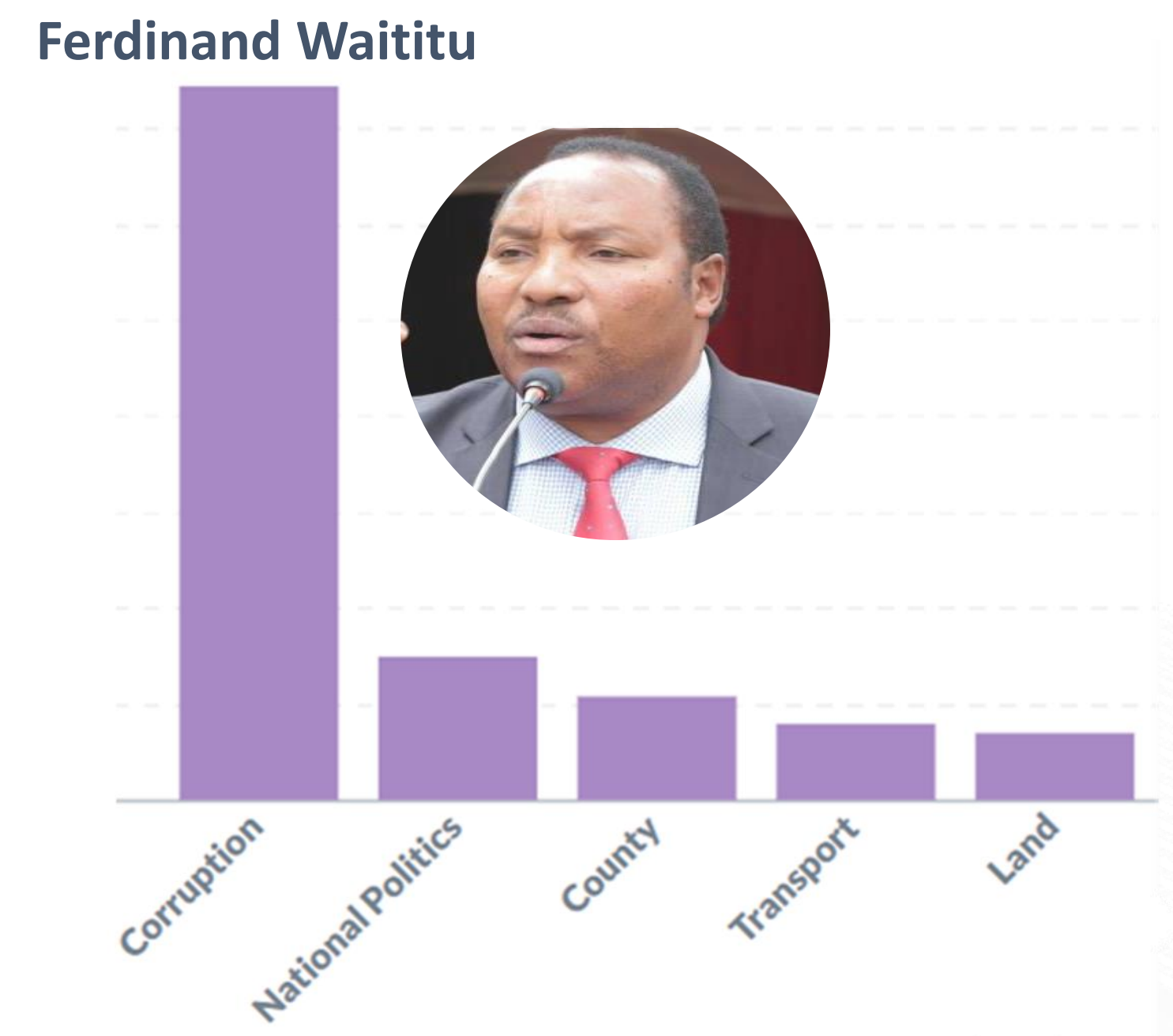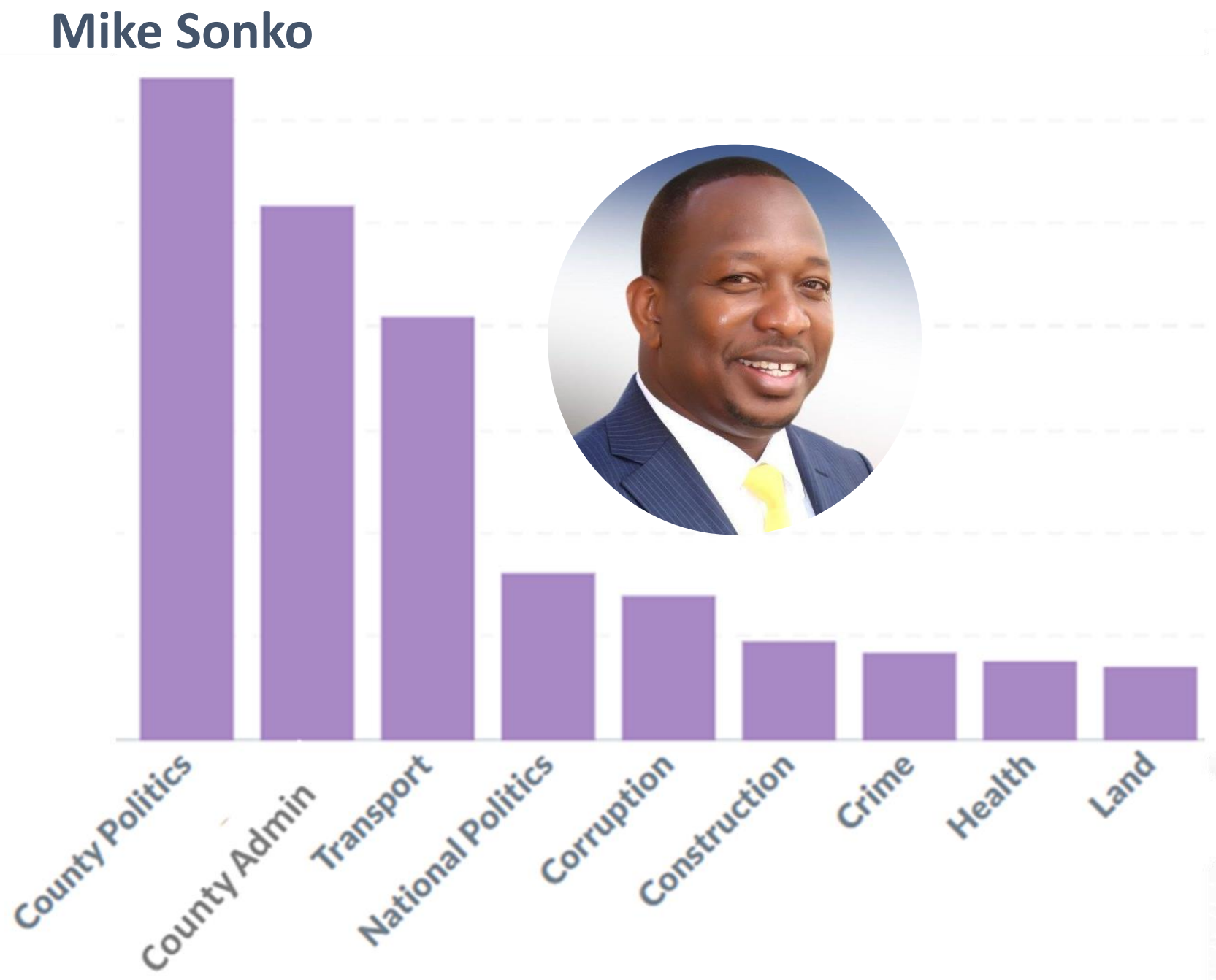|	
Uhuru Kenyatta	17.43%
William Ruto	13.13%
DPP Noordin Haji	7.08%
Raila Odinga	6.28%
Ferdinand Waititu	5.67%
DCI George Kinoti	4.95%
Henry Rotich	3.92%
CJ David Maraga	3.50%
Musalia Mudavadi	3.12%
Moses Lenolkulal Kasaine	3.01%
Evans Kidero	2.78%
Other	29.12%

Source: TIFA Research

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Governors with Highest Coverage in the News (October 2018 to June 2019)

Mike Sonko has the highest coverage in the news at 28% followed by both Ferdinand Waititu at 14% and Okoth Obado at 11%. Wycliffe Oparanya, the Chairman of the Council of Governor's and Alfred Mutua both have 7% news coverage.

28%

14%

11%

10%

8%

7%

7%

4%

4%

4%

1%

Mike Sonko | Ferdinand Waititu | Okoth Obado | Hassan Joho | Anne Waiguru | Wycliffe Oparanya | Alfred Mutua | Moses Kasaine | Kiraitu Murungi | Kibutha Kibwana | Lee Kinyanjui

Source: TIFA Research

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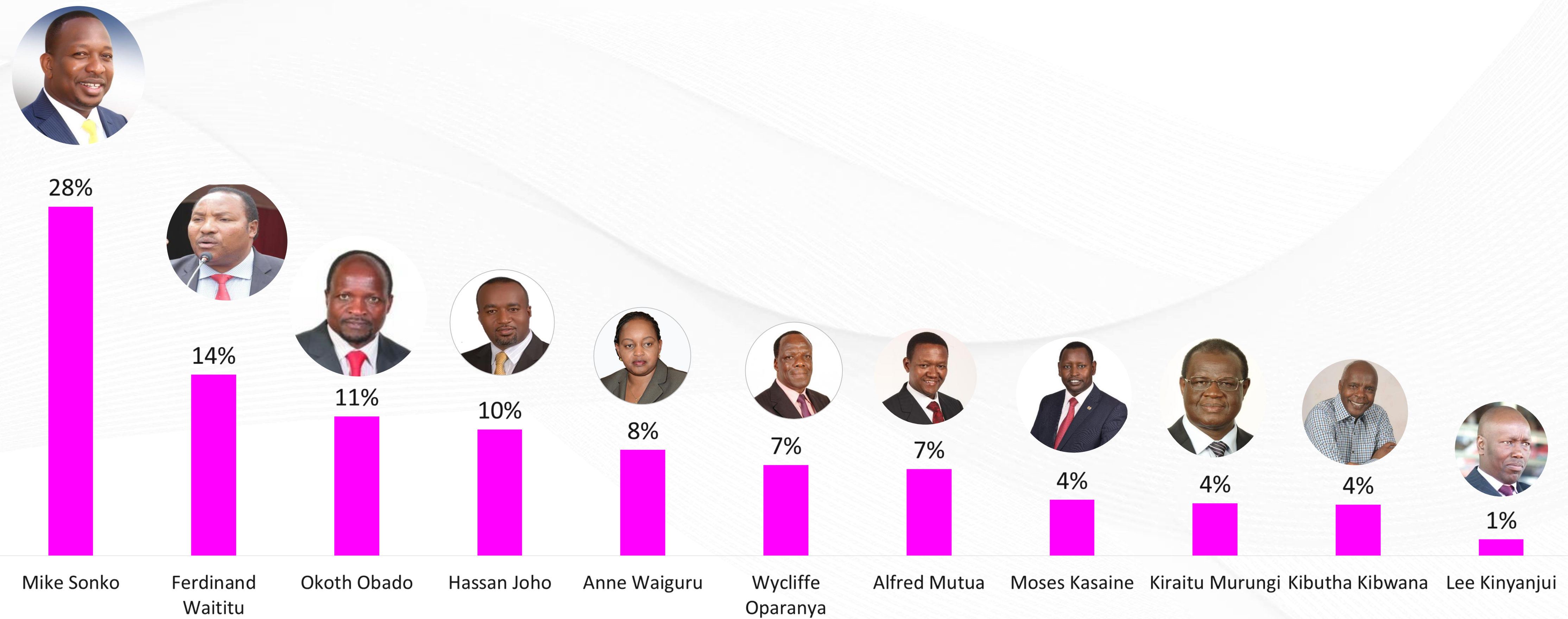
Top 5 Governors Covered in the News – thematic analysis

Mike Sonko

County Politics · County Admin · Transport · National Politics · Corruption · Construction · Crime · Health · Land

Ferdinand Waititu

Corruption · National Politics · County · Transport · Land

Okoth Obado

Crime · Corruption · National Politics · Judiciary · County · County Politics

Hassan Joho

National Politics · County Politics · Crime · Corruption · County Admin · Regional Politics

Anne Waiguru

County Admin · National Politics · Health · Corruption · County Politics

The data is charts show a summary of coverage of each governor by themes. The data does not show tonality – whether the story was positive or negative for the personality.

Internet Access and Digital Content

Internet Subscribers

The data market in the country grew by 173% between 2014 and 2018. The SEACOM fibre cable launched in 2009 and its subsequent uptake reduced internet costs by up to 95% to wholesale customers while providing a far greater speed of Internet connection. As a result, there was an increase in access to mobile broadband at a more affordable price. It should be noted that the mobile phone is the most available and preferred medium of accessing the internet with over 90% market share.

Data/Internet subscribers (millions)
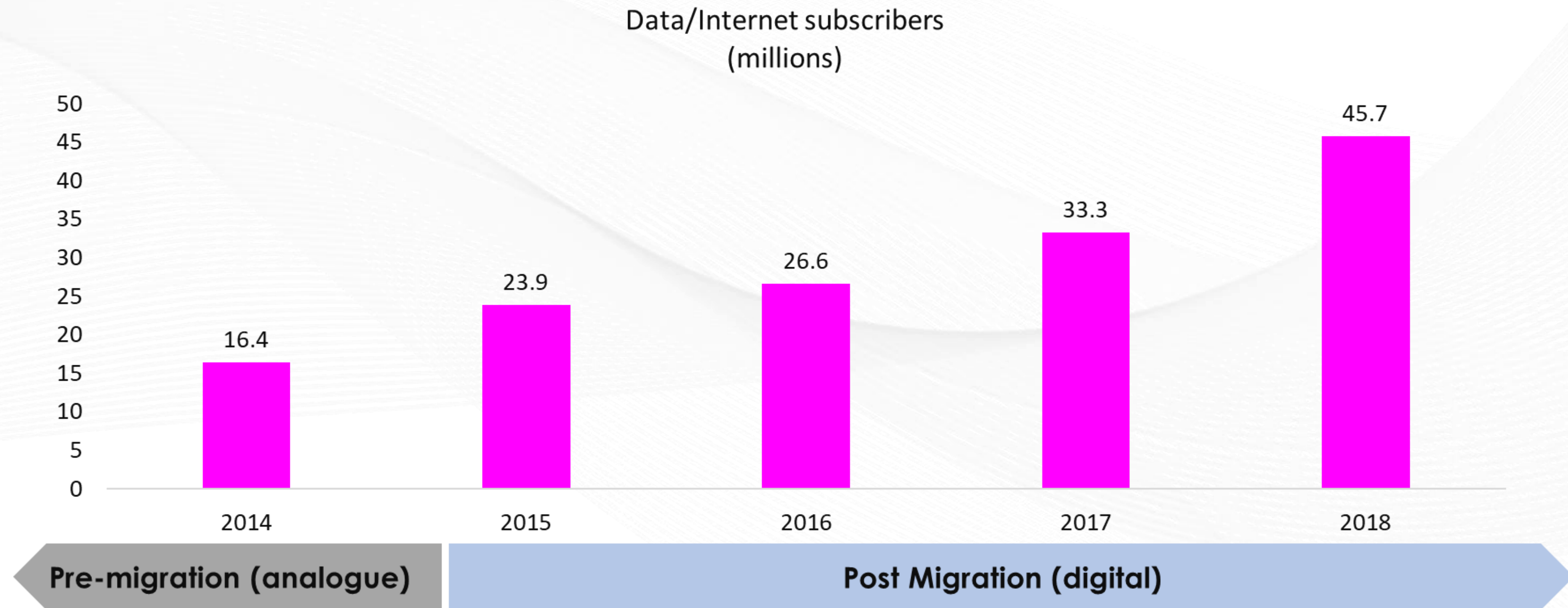
Source: Communications Authority

Popular Internet Platforms

Amongst internet users, Facebook and WhatsApp are the most used internet platforms with over 70% mentions in 2018 and 2019. These high figures could be attributed to the fact that these two services are offered for free by the telecommunications providers. YouTube and Instagram also have notable mentions. Approximately a third of internet users indicate that they use Twitter.
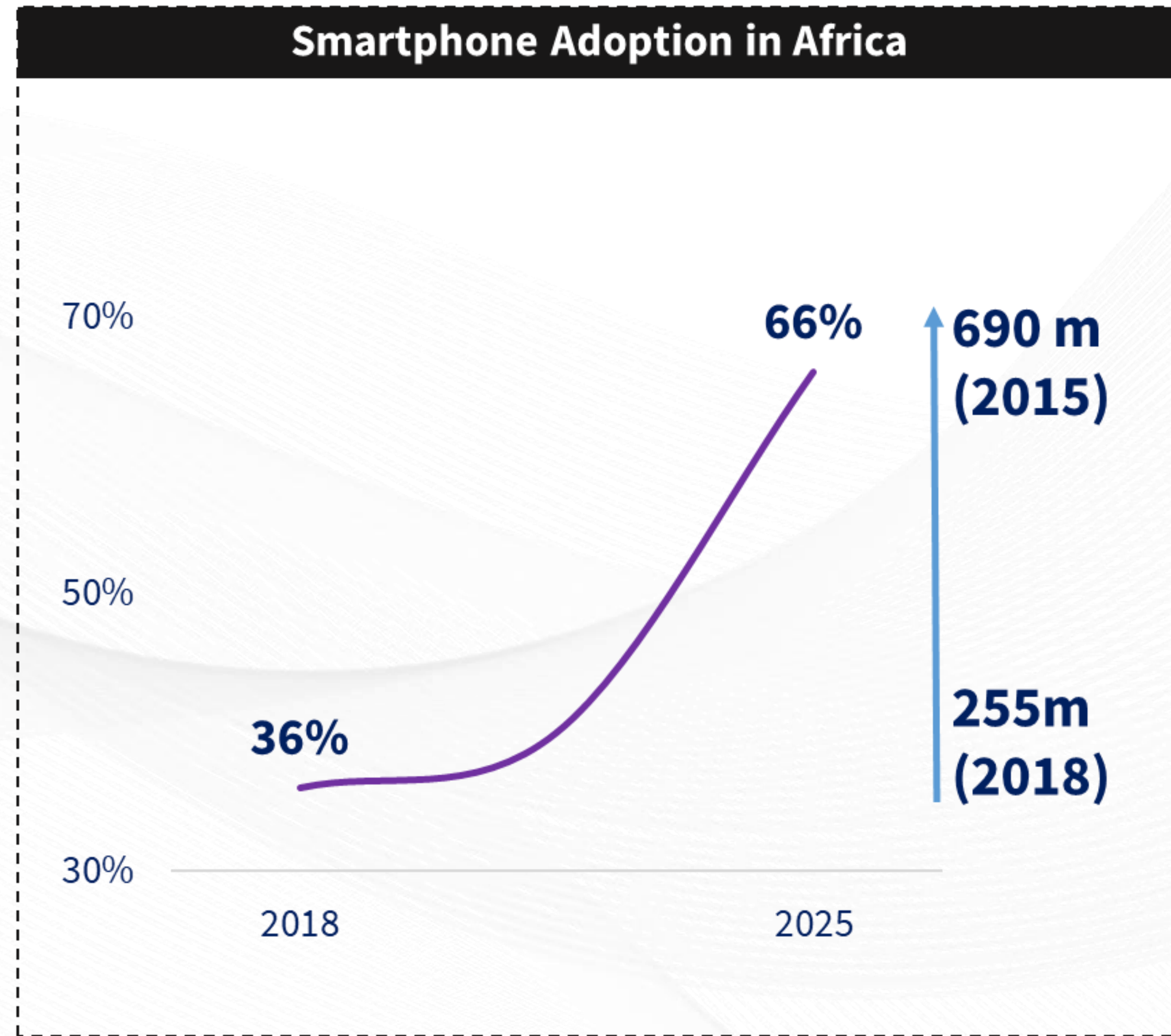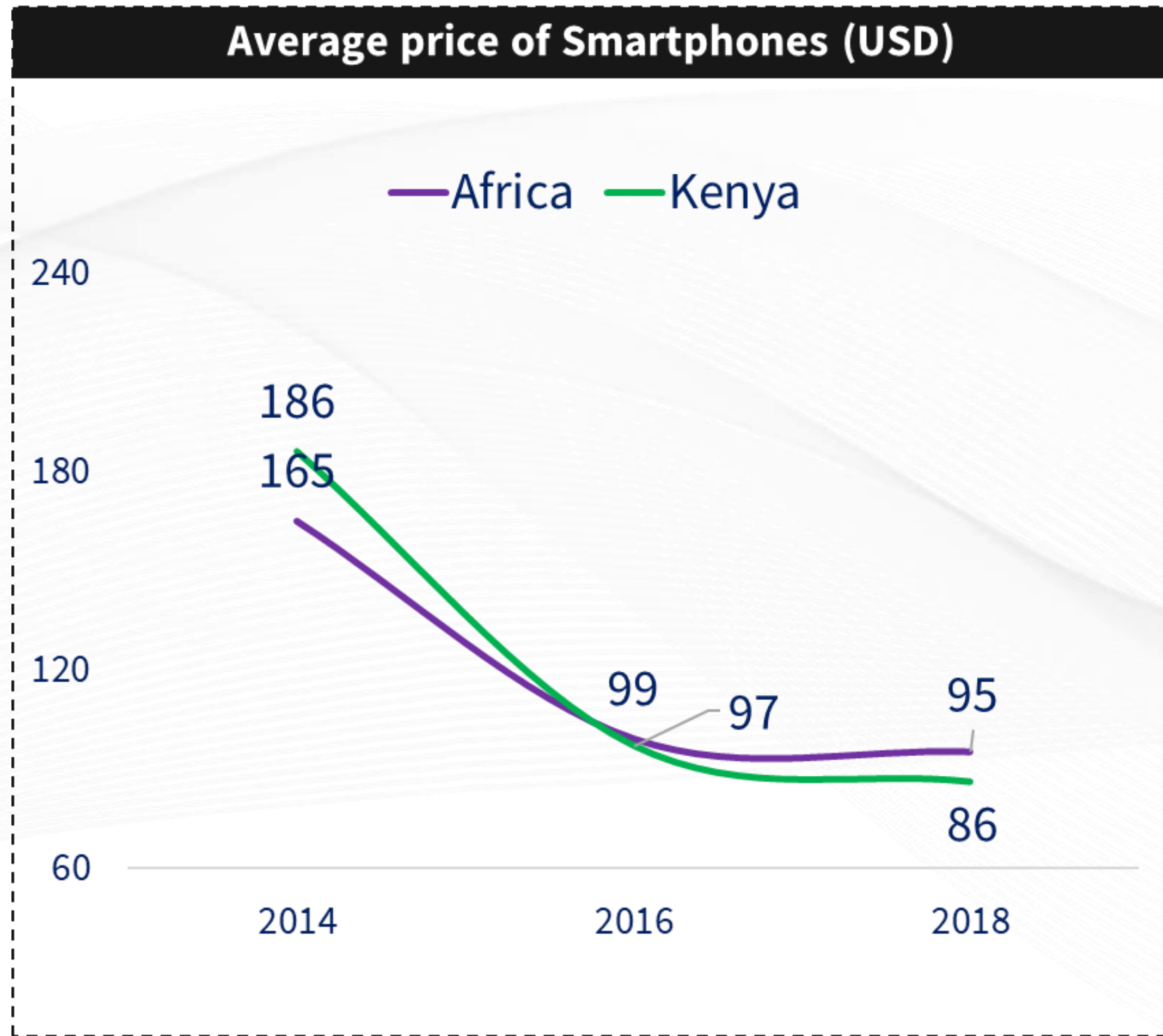
Active Social Media Users Incidence (claimed)

■ 2018   ■ 2019

Platform	2018	2019
WhatsApp	73%	82%
FaceBook	70%	80%
YouTube	58%	61%
Instagram	43%	48%
FB Messenger	37%	41%
Google +	29%	
Twitter	29%	33%
Linked In	14%	16%
Snap Chat	11%	15%
Pin Interest	10%	13%
Viber	6%	5%
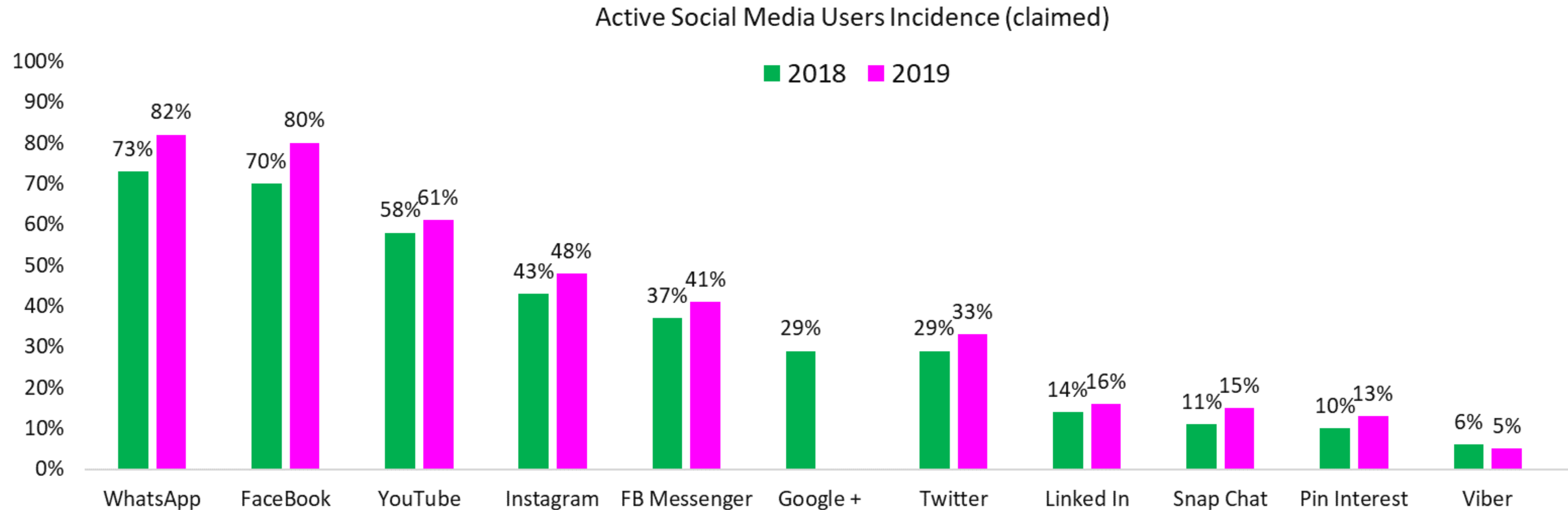
*Google+ was shut down/discontinued

Source: Hootsuite

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Mobile Market Trends

The average price of Smartphones has noticeably declined between 2014 and 2018. According to data from Jumia Kenya, the price of smartphones have declined by almost 50% between these years. The decline is reflected in Africa.

Average price of Smartphones (USD)

— Africa — Kenya

240
186
180 165
120
99
97
95
86
60
2014   2016   2018

Smartphone Adoption in Africa

70%   66%   690 m
(2015)
50%
36%   255m
(2018)
30%
2018   2025

Source: Jumia

Most Visited Internet Sites

Google.com tops the list of the most visited site in 2019 followed by YouTube.com. The most visited internet sites include local news sites, i.e. Standard Media, Nation and Tuko. It should also be noted that amongst the 20 most visited sites, there are three betting sites, i.e. Sportpesa, Betin and 1xbet and three social media sites, i.e. Facebook, YouTube and Twitter. Notably, the top two internet sites where users spend the most extended duration are Betpawa.co.ke, eCitizen and kra.go.ke, in that order.

Rank	Site	Daily Time on Site	Daily Views Per Visitor	Rank	Site	Daily Time on Site	Daily Views Per Visitor
1	Google.com	8:03	10.66	11	Sde.co.ke	4:00	1.95
2	Youtube.com	8:34	4.96	12	Jumia.co.ke	8:55	4.91
3	Standardmedia.co.ke	8:12	2.19	13	Wikipedia.org	4:10	3.11
4	Nation.co.ke	5:55	3.04	14	Ecitizen.go.ke	15:13	8.39
5	Tuko.co.ke	4:41	2.1	15	Sportpesa.co.ke	8:31	2.4
6	Kenyans.co.ke	6:10	2.93	16	Betin.co.ke	6:12	2.55
7	Kra.go.ke	16:58	5.25	17	Twitter.com	6:20	3.28
8	Facebook.com	9:26	3.97	18	Ghafla.com	4:09	2.1
9	Yahoo.com	3:54	3.55	19	Google.co.ke	3:45	3.5
10	Citizentv.co.ke	0.125	1.51	20	1xbet.co.ke	2:40	1.32

Source: Alexa

Top Internet Searches

Top Google searches in 2016 and 2017 are events and personalities while in 2018 and 2019, the top Google searches revolve around sports betting. In 2017, 8 out of 10 searches were politics based. The other two- SGR found itself at the top 10 as it was launched in this year and Despacito which happens to be the most viewed song on YouTube.

2016

1. Euro 2016
2. Donald Trump
3. Olympic Games 2016
4. Jacob Juma
5. Muhammad Ali
6. Hillary Clinton
7. Diana Chelele
8. Lucy Kibaki
9. Project X
10. Achieng' Abura

2017

1. IEBC Results
2. Gambia
3. KCPE results
4. Despacito
5. Tibim
6. NASA Coalition
7. Jubilee Party
8. NASA flag bearer
9. Standard Gauge Railway (SGR)
10. Presidential results

2018

1. Sportpesa
2. Kenya
3. Livescore
4. News
5. Facebook
6. Betin
7. Prediction
8. Chelsea
9. Betpawa
10. Nation

2019

1. Sportpesa
2. Kenya
3. Livescore
4. News
5. BetPawa
6. Facebook
7. Betin
8. Prediction
9. Betika
10. Sportpesa Login

Summary of what Kenyans are searching online

Source: Google trends

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Advertisers' Perceptions

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Most Ideal Channels for Reaching Consumers in 2019

Social media is the most successful channel to reach consumers, followed closely by content marketing, while email campaigns, public relations and outdoor advertising are the least successful channels.
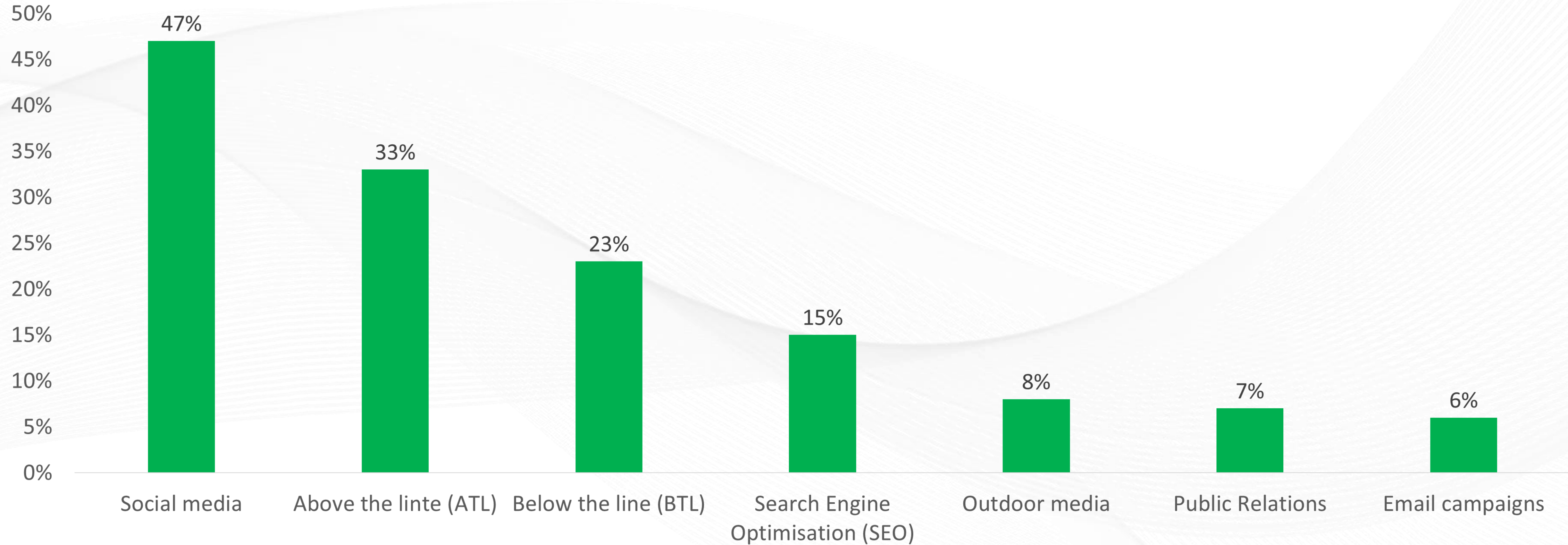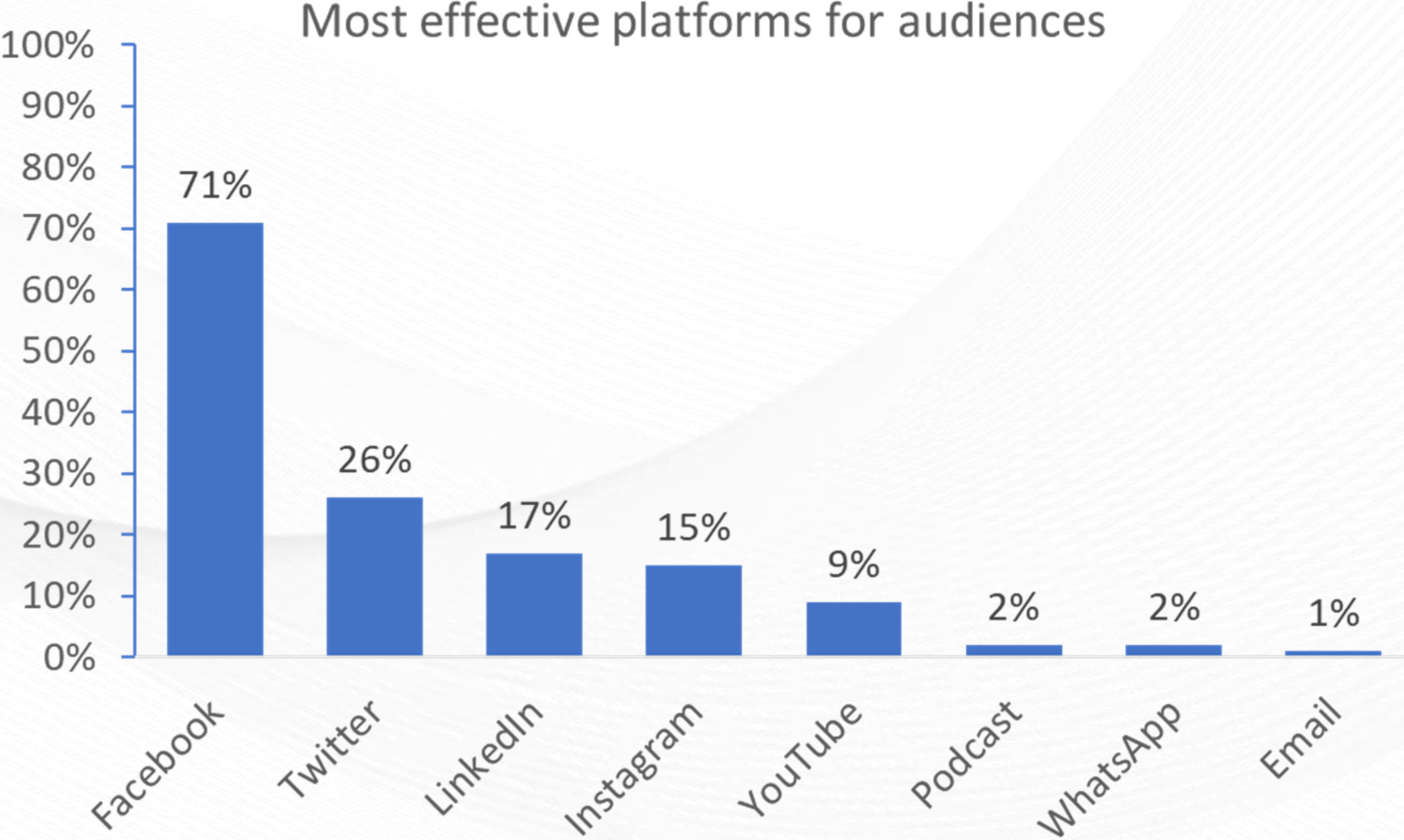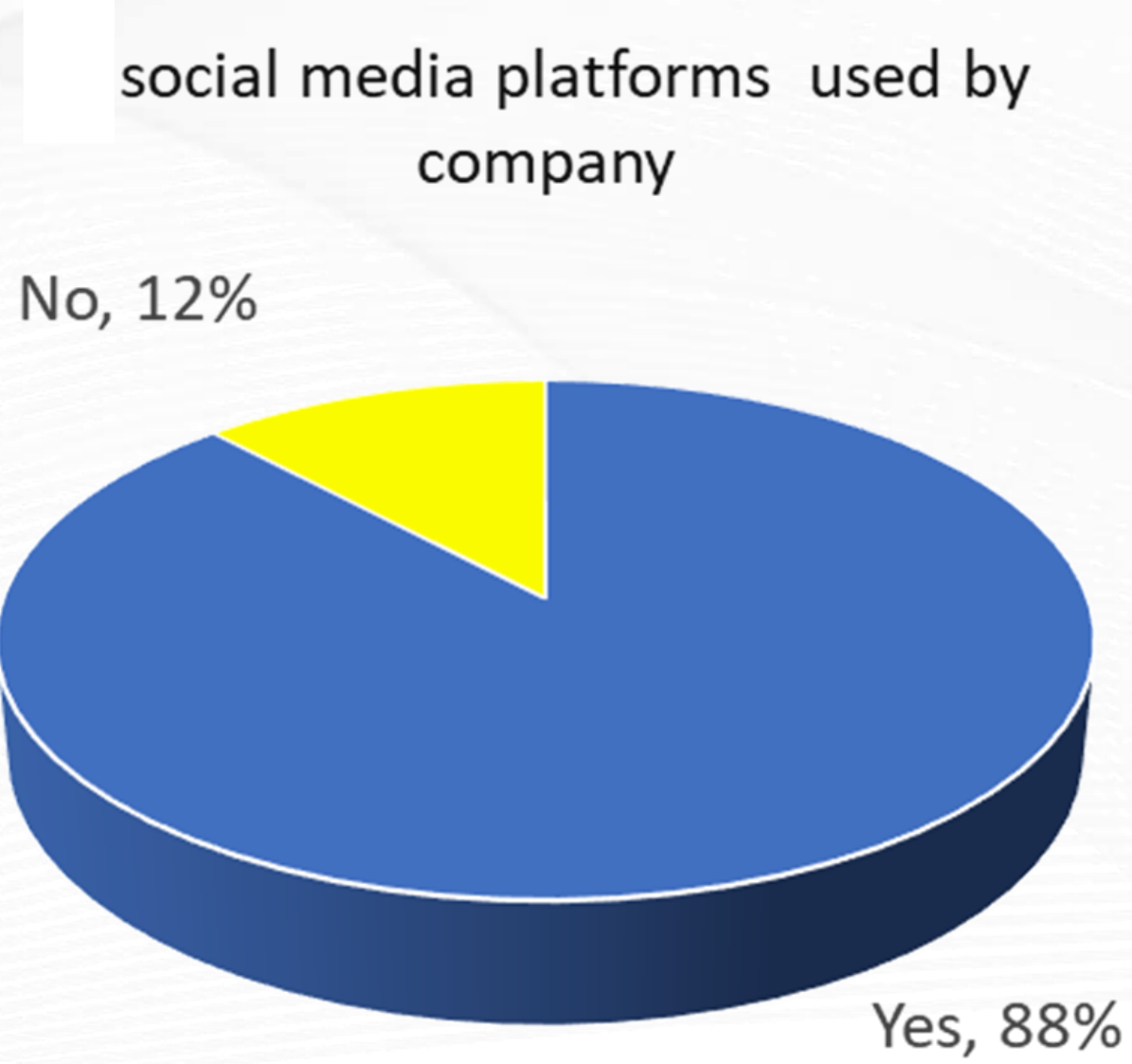

Source: Marketing Society of Kenya, End of Year Survey, 2018

☐ ATL = radio, tv, print

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Social Media Usage

Most organizations have social media platforms with Facebook being the most common platform for reaching their audiences. Some of the least used platforms are Podcasts, WhatsApp and Email.

social media platforms used by company

No, 12%

Yes, 88%

Most effective platforms for audiences

71% Facebook
26% Twitter
17% LinkedIn
15% Instagram
9% YouTube
2% Podcast
2% WhatsApp
1% Email

Source: Marketing Society of Kenya, End of Year Survey, 2018

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The Future:
Technology for Audience Measurement

A Historical Perspective

Audience research in Kenya has undergone a transformation from self-completion paper diaries to the day after recall. However, these data collection methods rely on the respondent's recall of media consumed. This is a difficult undertaking when a respondent is exposed to multiple media brands. The dynamic media environment therefore calls for modern and more efficient approaches for data collection.

In 2019, TIFAp+ passive audience measurement platform provides a timely solution. The passive audience measurement methodology is through an application installed in the respondents' phone. The media consumption data is submitted to a centralized server regularly within the day.

Pre-migration (analogue)   Post Migration (digital)

1999   **2014**   **2015**   **2019**   TIFAp+

Paper diaries Self completion

Mobile App Self completion

Day After Recall DAR

Passive Audience Research

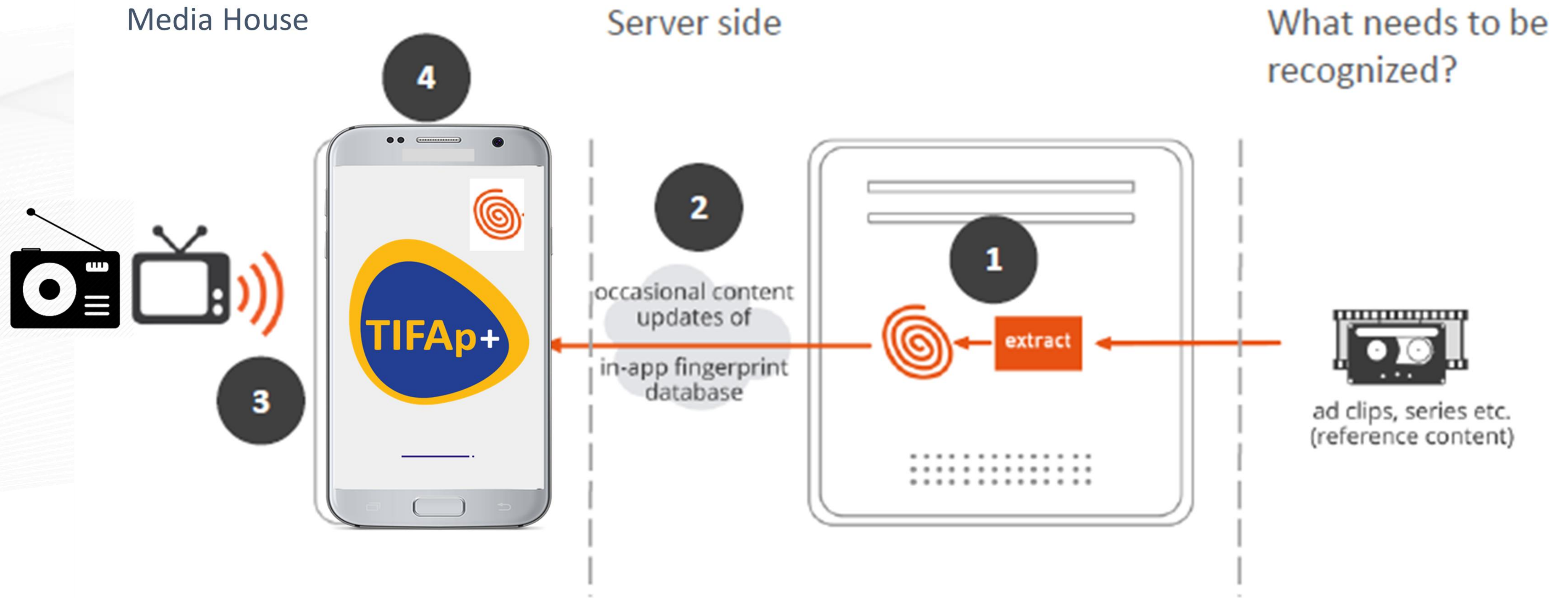reelforge | Building Brands

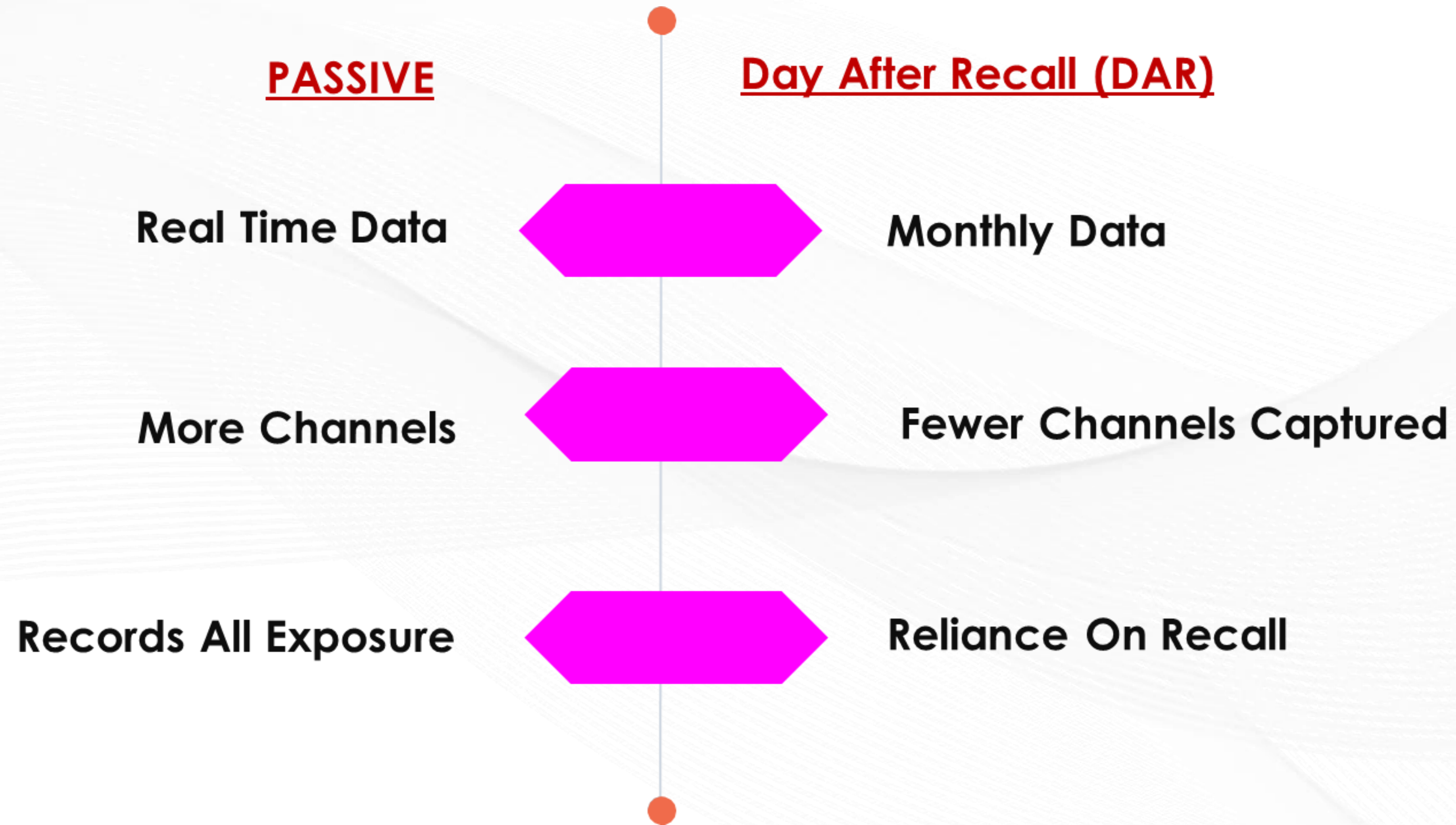TIFA RESEARCH
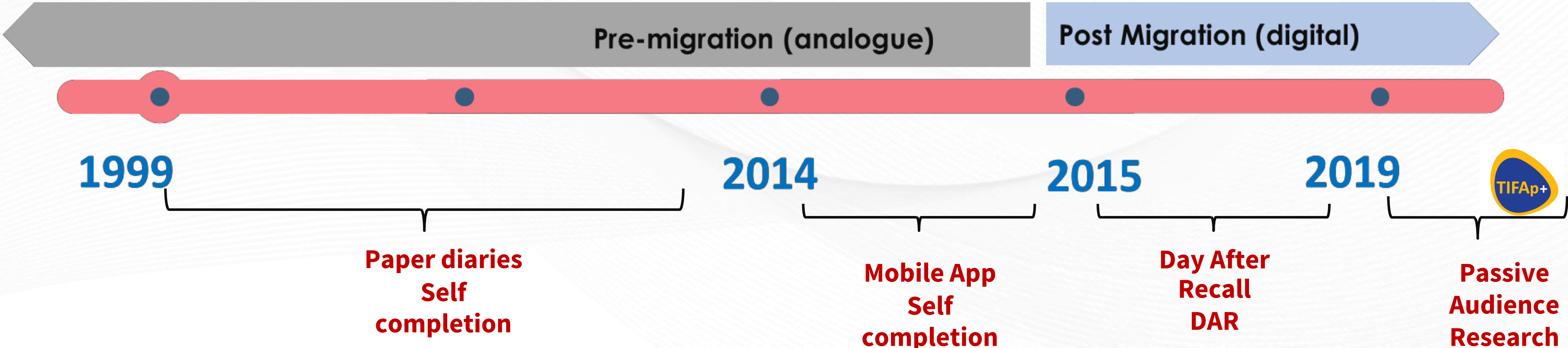
Passive audience methodology

- Passive is data collection methodology **without active involvement** of respondents.

- TIFA passive collects respondents' media consumption behavior **using a smartphone**.

Passive Data Collection - How it works

Media House

Server side

What needs to be recognized?

occasional content updates of in-app fingerprint database

extract

ad clips, series etc. (reference content)

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Passive Audience Measurement System vs Day After Recall

A comparison between passive and day after recall methodology that it is possible to generate real-time data . The passive methodology also captures more media brands consumed as there is no reliance on the respondents' recall. This means that a passive methodology would provide a more accurate assessment of media consumption habits.

PASSIVE

Day After Recall (DAR)

Real Time Data	Monthly Data
More Channels	Fewer Channels Captured
Records All Exposure	Reliance On Recall

Source: TIFA Research

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Passive Audience Measurement System : Average Number of Stations in Nairobi

A comparison between passive and day after recall methodology shows that more stations are recorded amongst respondents. These figures

Average number of stations per day
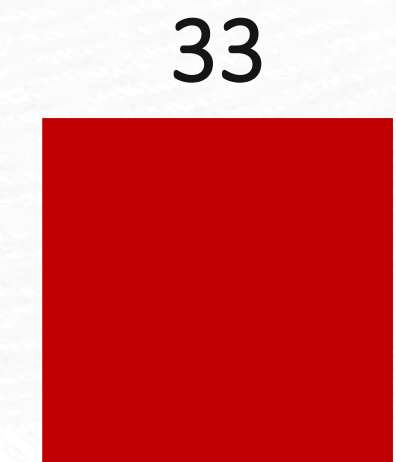
Average number of stations captured for all audiences

5.2

3.4

75

33

Radio

TV

Total Radio Stations Captured

Total TV Stations Captured

Source: TIFA Research (April-May Nairobi Data)

Audience measurement summary

- Increasing number of channels leads to fragmented audiences and as such, audiences in Kenya are interacting with multiple media platforms. Therefore, media houses and advertisers need to identify innovative ways of appealing to them.

- There is need for data driven decision making for consumer understanding and to attract audiences.

- A passive measurement system is the solution for audience measurement.

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About the Authors of this Report

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Reelforge is East Africa's foremost authority in the field of media monitoring and intelligence with a passion in building brands. Our Brand Masters strive to enrich brands across sectors and industries with in-depth analysis about the true performance of their brands and most importantly, how to drive their growth. The synergy of our data oriented service provision and our commitment to our clients defines us.

Services offered include;
❏ Media Monitoring
❏ Media Measurement
❏ Advisory & Strategy
❏ Research Services

TIFA Research is an African based full market research company. Insight generation is in our DNA, we strive to ensure that we unearth great consumer insights. We leave no stone unturned. This is our brand promise. TIFA leverages on technology to enhance our data collection processes and analysis. TIFA uses mobile phone data collection methods that guarantee high quality data outputs, faster and cost effectively.

Services offered include;
❏ Market Research
❏ Social Research
❏ Sports Research
❏ Audience Research

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