Research shows evolution of Kenyan media landscape

By Carole Kimutai

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Research on Kenyan media audiences has revealed that Kenya is more urban than 12 years ago as the population becomes more affluent. This is according to a countrywide research conducted by research firm Synovate under the Kenya Audience Research Foundation (KARF) also reveals the growing popularity of entertainment content.

The LSM (living standards measure) aims to measure the level of affluence i.e. what people can buy. From the research, Kenyans are becoming more affluent a factor contributed by an improving economy. It is believed consumerism will continue to increase as organisation produce goods and services targeting the masses.

The study was heavily based on statistics from the Kenya National Population and Housing Census 2009 and done using a national probability survey covering people aged 15 years and older who gave information about their media consumption habits through face-to-face interviews and media diaries. The study covered the first quarter of 2011 (January to March).

Kenya was segmented into 12 topographical regions down from 16 when the study was last carried out in 2007. The total population was 22 038 220 - of 15-year-olds and above who make up the total universe that media will be trying to reach.

The research shows an impressive and heavily segmented growth in radio listenership, and a growing consumption of the internet. "Of the people interviewed, 99% had listened to radio in the previous four weeks compared to 71% who had watched television and, 48% who had consumed print media," says Joe Otin, media research director at Synovate.

Print media

For print media, out of six million readers, 36% read a single print compared to 44% and 20% who read two and multiple publication respectively in the previous seven days. The Kenyan print media sector is dominated by two main players - the Nation Media Group and the Standard Group both who publish daily newspapers. *The Star* and the *People Daily* are the two other newspapers that are trying to compete in the duopolistic market. 92% of the people had read *Nation* in the last seven days compared to 54% who had read the Standard newspaper.

As value addition to readers, the two main newspaper publishers include magazine inserts on weekdays. For example on Tuesday, both have business magazines also known as pullouts and on Saturday's women magazines. *Nation* has a business newspaper - *Business Daily*, that is published five times a week (week days), and *The East African* - a weekly newspaper that focuses on East Africa's business and political issues.

In a month, 10.5 million readers consume the print media that also include magazines. Three million consume print daily. In terms of content, 95% read local news, 85% sports, and 83% international news. Magazine inserts are read by 52% of readers.

Television viewership

The study shows an impressive growth in monthly television viewership in Kenya. According to Otin, news stations have contributed significantly to the growth of viewership numbers. Secondly, the growth can be attributed to a government law passed three years ago that requires broadcasters to air 60% of local programming. This has seen stiff competition in the television industry with broadcasters investing in local programming that segments viewers.

Kenya is also preparing to move from analogue to digital broadcasting. This move will see further segmentation of content with broadcaster getting several channels to broadcast their content. As the 2012 deadline for the shift to the digital platform approaches television consumption trends will continue changing especially with the growing use of the internet as a communication platform and users streaming content via mobile phones.

When it comes to programming, broadcasters allocate 39% to internal programmes compared to 52% local content. On share of time spent viewing by genre, 60% is on local content and 30% international content. African content accounts for 10% of the time.

In comparing genre time allocated and time spent viewing overall, news rates high. Broadcasters allocate 37% of the time to news and viewers spend 33% of their time overall watching news. Most interesting is the partly 6% broadcasting time allocated to soap operas compared to 19% of the overall time dedicated to soapies by Kenyan viewers. Whereas music accounts for 15% of the programming time allocated, only 7% of the time is spent watching music on television. "There is available potential for soaps and drama," says Otin.

Radio listenership

Radio consumption trends have changed significantly in the last 2.5 years. The average number of radio stations listened to fell from 4.3 in the third quarter of 2008 to 3.9 in the first quarter of 2011. However, the average number of television channels viewed per week increased from 3.0 to 3.5 in the same period. This trend can be attributed to the growth of niche stations that serve various geographical regions in Kenya. In the last five years, there has been a proliferation of vernacular stations that broadcast in dialects spoken by people in Kenya. "This dip in average number of radio stations is because people have settled for their preference," explains Otin.

Radio consumption in urban areas shows stiff competition between stations that broadcast in English and Swahili, and those that broadcast in vernacular languages. In the greater Nairobi topography, the share of time spent listening by main language of broadcasting show 47% English, 28% Swahili, 17% Kikuyu and the other languages 8%. The average number of radio stations listened to per week is 3.8 while the average number of hours spent listening to radio per day is 4.5.

The language preferences vary from topography to topography. Nairobi has the lowest hours spent listening to radio at 4.5 compared to 8.6 in the North Western topography. The trend in Nairobi, Otin says is because people have a lot of other options like the internet and newspapers, and in the evening, they have an option of watching television.

New media

In four years, the percentage of people who had used the internet in the past four weeks grew by 7% from 9 to 16%. 13% of those interviewed had accessed the internet in the last seven days.

From the study, at least 87% of the population have made a call using a mobile phone and 67% have sent an SMS in the past seven days. The study also shows a growing use of internet and mobile phones. 64% of the people access the internet using their cell phones and 54% at a cyber café.

The highest usage of internet mobile is among the 15-to-17-year-olds which accounts for 86%; 18-to-24-year-olds stand at 80%. The percentage usage declines with the age of users who access the internet on a desk top computer. 64% of 35-to-44-year-old access the internet on a computer compared to 58% who use their phones and 24% their laptops. Mobile phones and desk tops are almost equal amongst the 25 to 35 years standing at 65% for mobile and 63% for desk top.

When it comes to online marketing strategies, there is need to have the mobile phone in mind. Most websites now have mobile versions to make it easier to access information. The mobile companies in Kenya are now concentrating their efforts on the data market as it seems to be the next big thing after voice.

Of interest is the convergence of print and electronic media online. Listeners can stream music online, watch news on YouTube and read newspaper content online. The main stream media is now using social media sites Facebook and Twitter to reach audiences. FM radio presenters interact with audiences via Facebook fan pages and television reporters receive feedback on content via Twitter. All these have changed the media consumption trends significantly in Kenya.

The real potential, Otin says, is in internet and mobile. "There is more convergence into single devices (the mobile phone) and there is a big opportunity in this area especially in Africa as penetration deepens," he adds.

Follow me on Twitter @CaroleKimuta

ABOUT CAROLE KIMUTAI

Carole Kimutai is a writer and editor based in Nairobi, Kenya. She is currently an MA student in New Media at the University of Leicester, UK. Follow her on Twitter at @CaroleKimutai.
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