COMMUNICATIONS AUTHORITY OF KENYA

AUDIENCE MEASUREMENT AND INDUSTRY TRENDS REPORT FOR Q1 2019-2020

KARF

The Kenya Audience Research Foundation

CONTENTS

BACKGROUND

In Kenya, broadcasting which is mainly done using Radio and TV is a medium for entertainment, information and education. Both Radio and Television outlets are accessible to nearly all of the people of Kenya, and are a powerful medium for influencing culture, beliefs and values as well as a tool for economic growth and development.

In view of the above, the Communications Authority of Kenya (CA), in fulfilment of its mandate in regard to administering the broadcasting content aspects of the ICT law, carries out monitoring of television and Radio broadcasters' programmes in order to assess the level of broadcasters' compliance with the regulatory requirements.

This monitoring provides insight into appropriateness of content aired as well as compliance with the requirements on: 40% Local content quota; PWDs accessibility mechanisms provisions; Advertisements requirements (10 minutes in every 30 minutes of programming, 40% local advertisement requirements; and the requirement to provide 5hrs per week of children's programs during the watershed period.

In this regard, CA contracted the Kenya Audience Research Foundation (KARF) to provide Quarterly Audience measurement and Industry Trends Data for the fiscal years 2019/2020 and 2020/2021. Detailed here below is the data received for Quarter 1 (July-September 2019).

METHODOLOGY

(a). AUDIENCE MEASUREMENT (KARF TRACKING SURVEY)

1. **Fixed panel Target**: 3000 daily sample nationally aged 15+ years
2. **Single Data Sourcing** for TV, Radio, Print (Newspaper & Magazine) and Online data
3. **Sampling frame** is based on KARF Establishment Survey 2015(Using KNBS, NASSEP V)
4. **Face to Face recruitment** of panelists to verify LSM's and training on the process
5. **CATI-** (Computer Aided Telephonic Interviews)
6. **Key Analysis Variables** - Age, gender, LSM, topography, rural/urban
7. **Survey Period**: Daily data collection, reported Monthly
8. **Time Segment**: 30 minutes blocks for Television & Radio, daily readership for print and daily Internet usage habits.

The Research Covers **Quantitative** research and NOT **Qualitative**

(b). MEDIA MONITORING (REELFORGE)

Reelforge has specialized in media monitoring services since 2008. Over the years, we have developed a world-class process for tagging and analyzing all advertising across multiple stations in the region. We believe passionately that the work we do impacts brands across the region especially since we focus on providing you with analysis you can use to drive your brand's growth.

Our Ad monitoring methodology is as below;

Stage 1 –Data capture:

Reelforge has specialized recording servers in various locations across the country. At each location, the recording servers are connected to TV and radio antennas. This allows them to capture all the stations within that region. For example, in Mombasa we capture over eight fm stations from the coast region. All the servers in each of the locations are networked (wide-area network). Reelforge has collaborated with one of Kenya's largest internet backbone providers. This interconnectivity allows us to capture and monitor all the TV and FM stations in real-time.

Stage two –Storage:

All recordings from all over the country are then stored on our central storage servers located in Nairobi. Reelforge has a policy of keeping all recordings; we have broadcast recordings of all stations in Kenya going back to 2009.

STAGE 3 –DETECTION STAGE:

Reelforge uses two methods of detecting ads. The first method is the auto-detection of pre-recorded ads. Reelforge has analysts who inputs new ads into our auto-detection servers. The software then produces a digital fingerprint of the ad. Once this is done, the servers automatically detect that ad every time it is aired on any station countrywide. The second method is manual entry. Reelforge has employed media analysts who monitor all the stations and input presenter mentions. It is not possible to auto-detect these mentions and so this is a manual process. However, the analysts input the mentions onto very advanced software. This allows our clients to be able to listen and view all ads directly from their computers.

AD Monitoring Services

Stage 4 –Analysis Stage: once both automated and manual ads are inserted into our database, our specialized analysis servers crunch all that data then pass it onto our client website. There are over 10,000 ads and dimensions logged into our database every day. We have therefore developed software that looks at that data and presents the relevant data to our various clients dynamically.

Stage 4 –Ad Values:

Reelforge has procured advertising rate cards from all stations that we monitor. Once both manual and auto-detected Ads are uploaded on our portal, the system automatically assigns the advertising value of that Ad given that relevant parameters such as station, time and length of the Ad will already have been put in the detection stage.

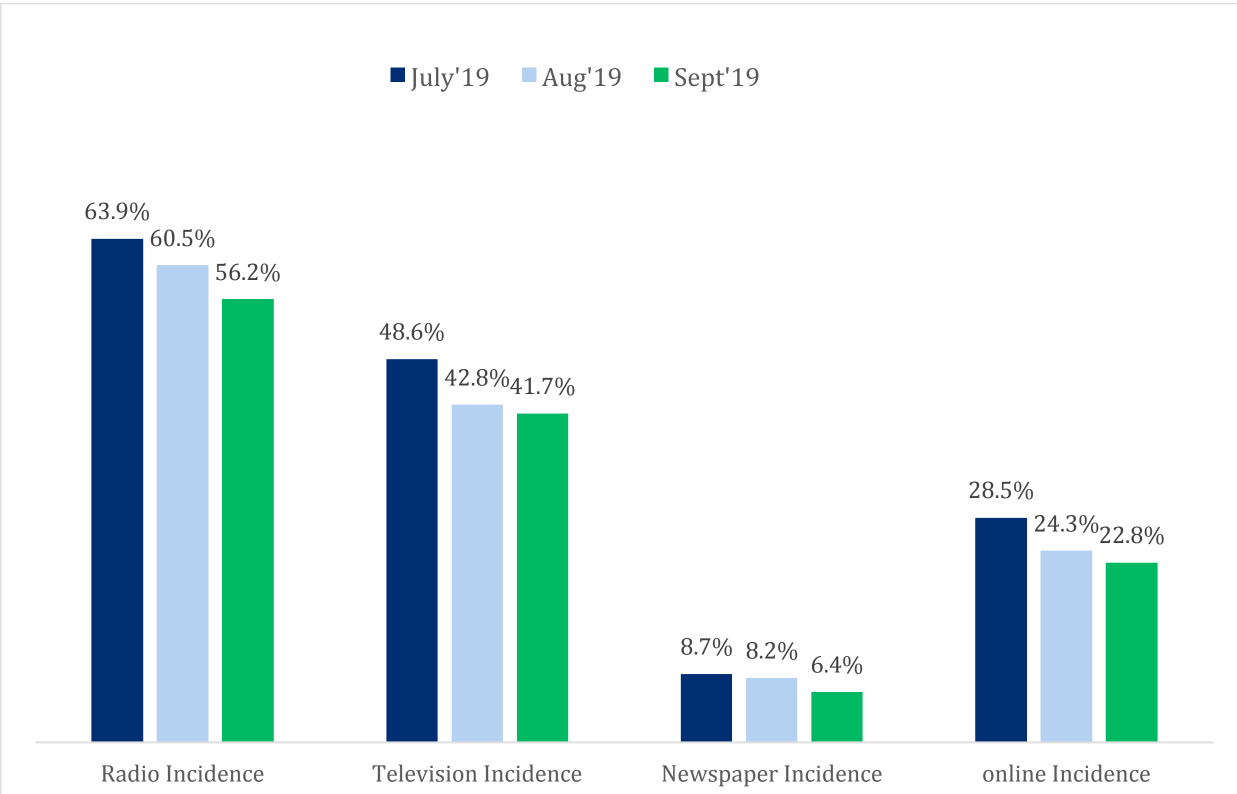
Stage 6 –Quality Control:

Reelforge has a full Quality Control department whose function is to manage the daily reconciliation process. The department is responsible for managing this system and ensuring all client/ Media house queries are adequately catered to

Stage 7 –Client website:

Reelforge has the most advanced media-monitoring website in the region. Our model is different from other monitors. We allow our clients to generate their own reports as and when needed. Clients can generate proof-of-flight (brand) reports, industry competitor reports

NATIONAL INCIDENCE OF ACCESS TO MEDIA

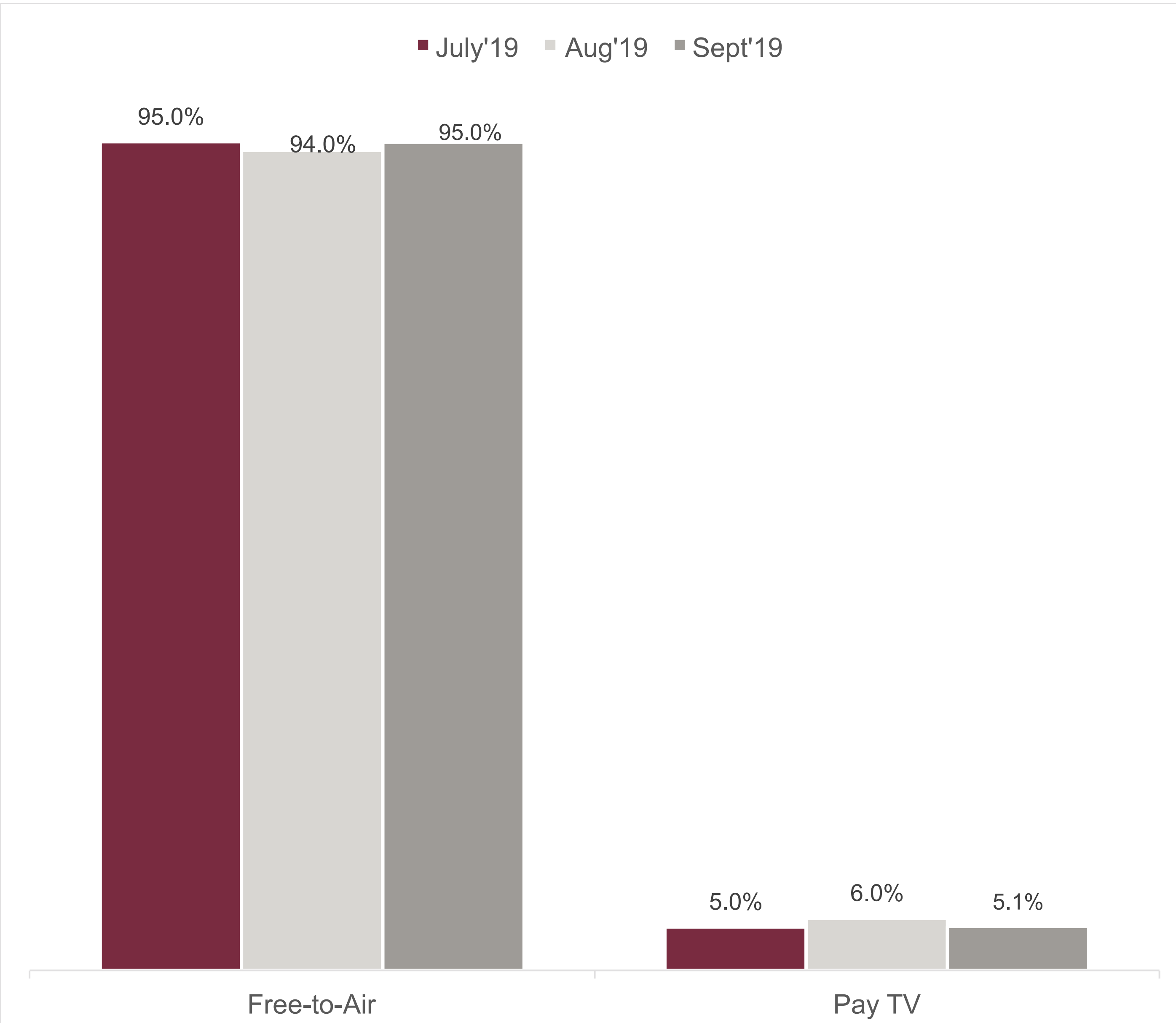


N=19.0: Past 7 days media Consumers as per Establishment Survey 2015

Chart 1:

Average daily incidence of Radio listenership is the highest across the month, with a decline in August and September. The decline is also noticed on all other media channels. This could be attributed to the absence of trending political news or sports during the period. In the month of July there was AFCON.

AUDIENCE DEMOGRAPHICS FOR FREE-TO-AIR AND PAY TV RADIO AND TELEVISION DATA.



N=7.5M: Average Daily TV Viewers in September 2019

Chart 2:

Free to Air channels remains high at over at over 90%, this is a clear indication that Kenyans acquired the set top box to watch the Free to Air channels.

THE CURRENT AUDIENCE DEMOGRAPHICS FOR FREE TO AIR AND PAY TV STATTIONS

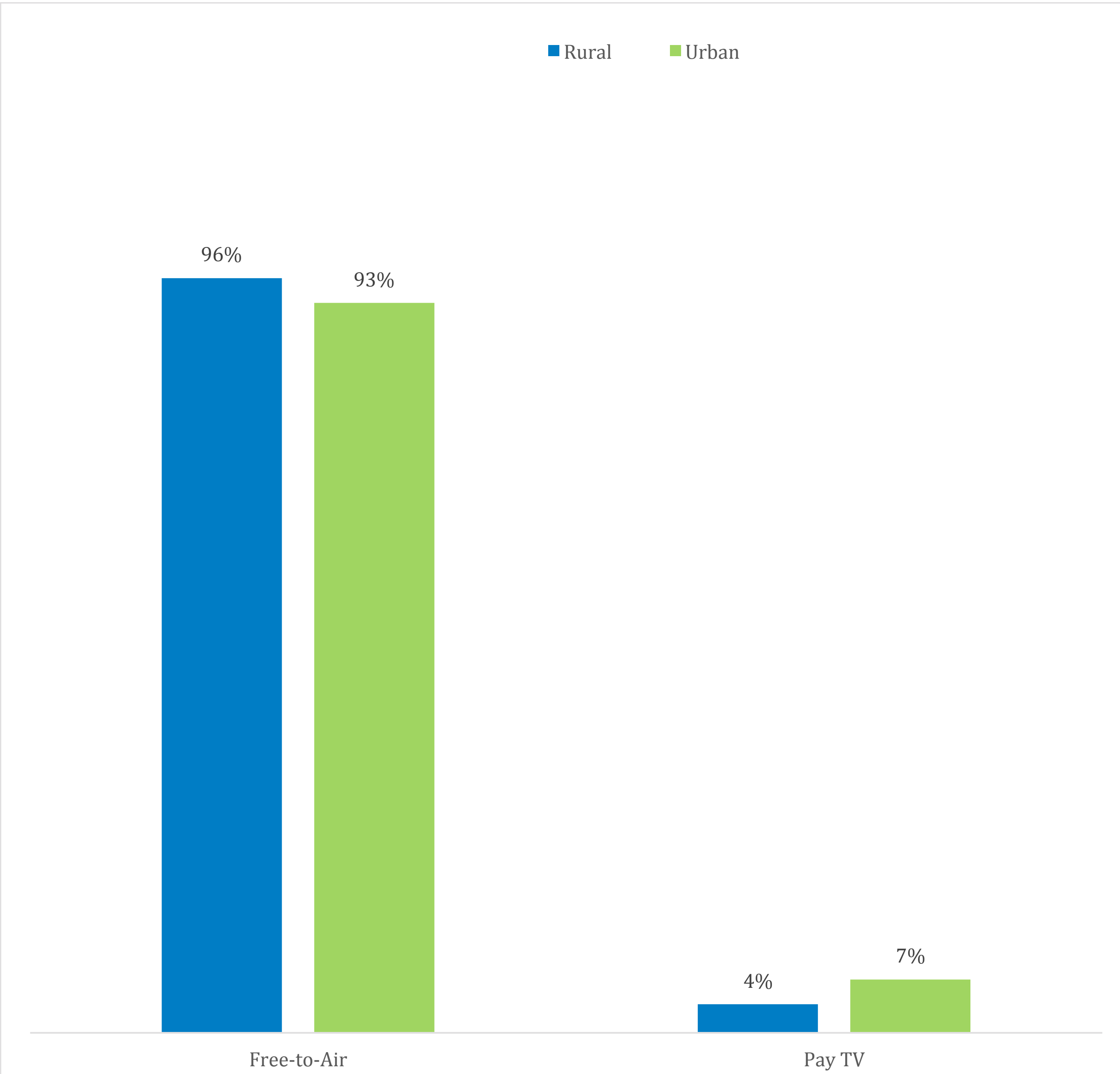


Chart 3: Free to Air channels viewership is higher in the rural areas but not significantly, while Pay TV is higher in the urban with the similar margin.

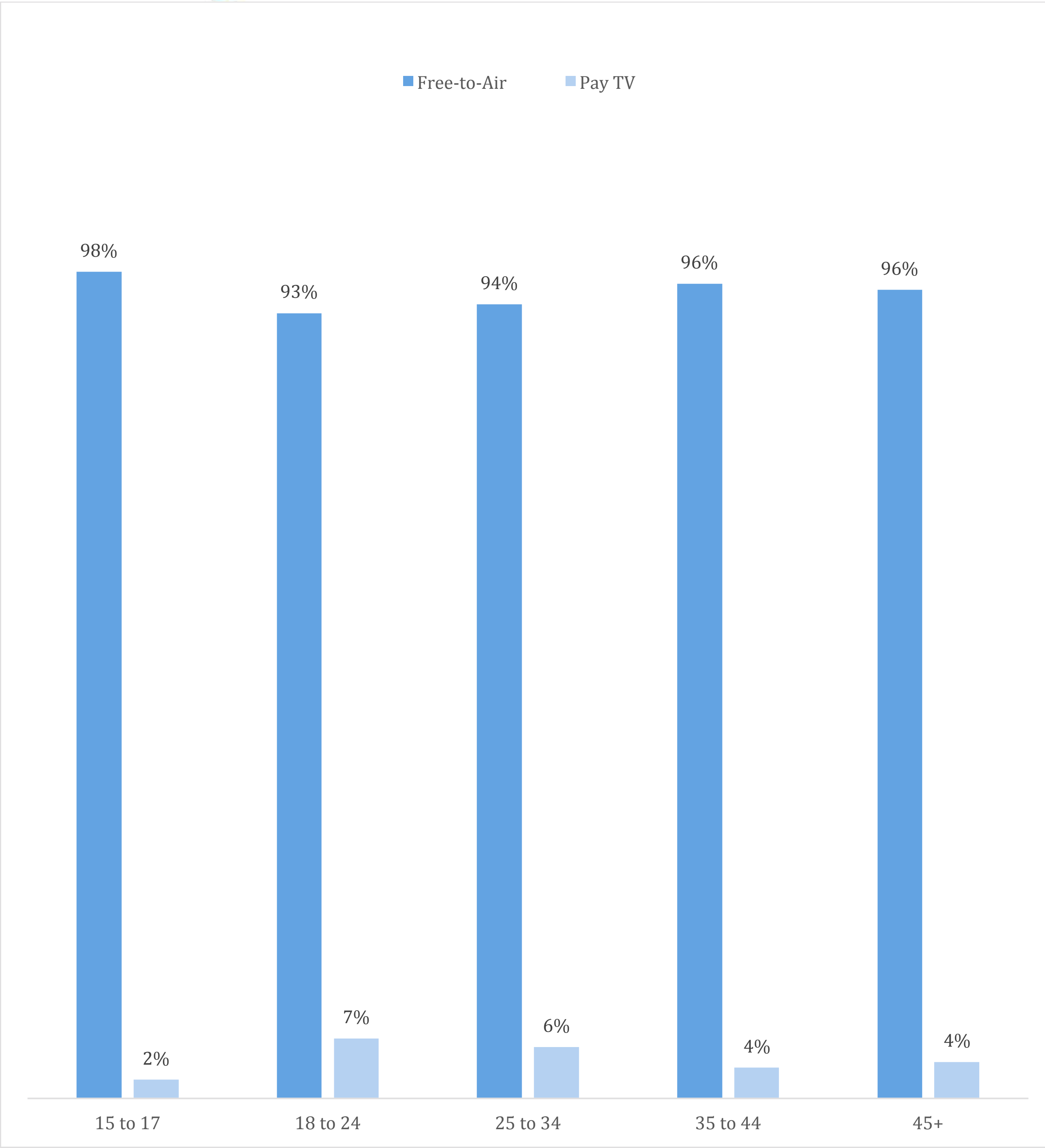


Chart 4: Among the different age segments of the media consumers, Free to Air channels viewership dominate all, Pay TV is slightly higher in the age brackets 25-44, this is the segment that watch mainly sports on Super sport.

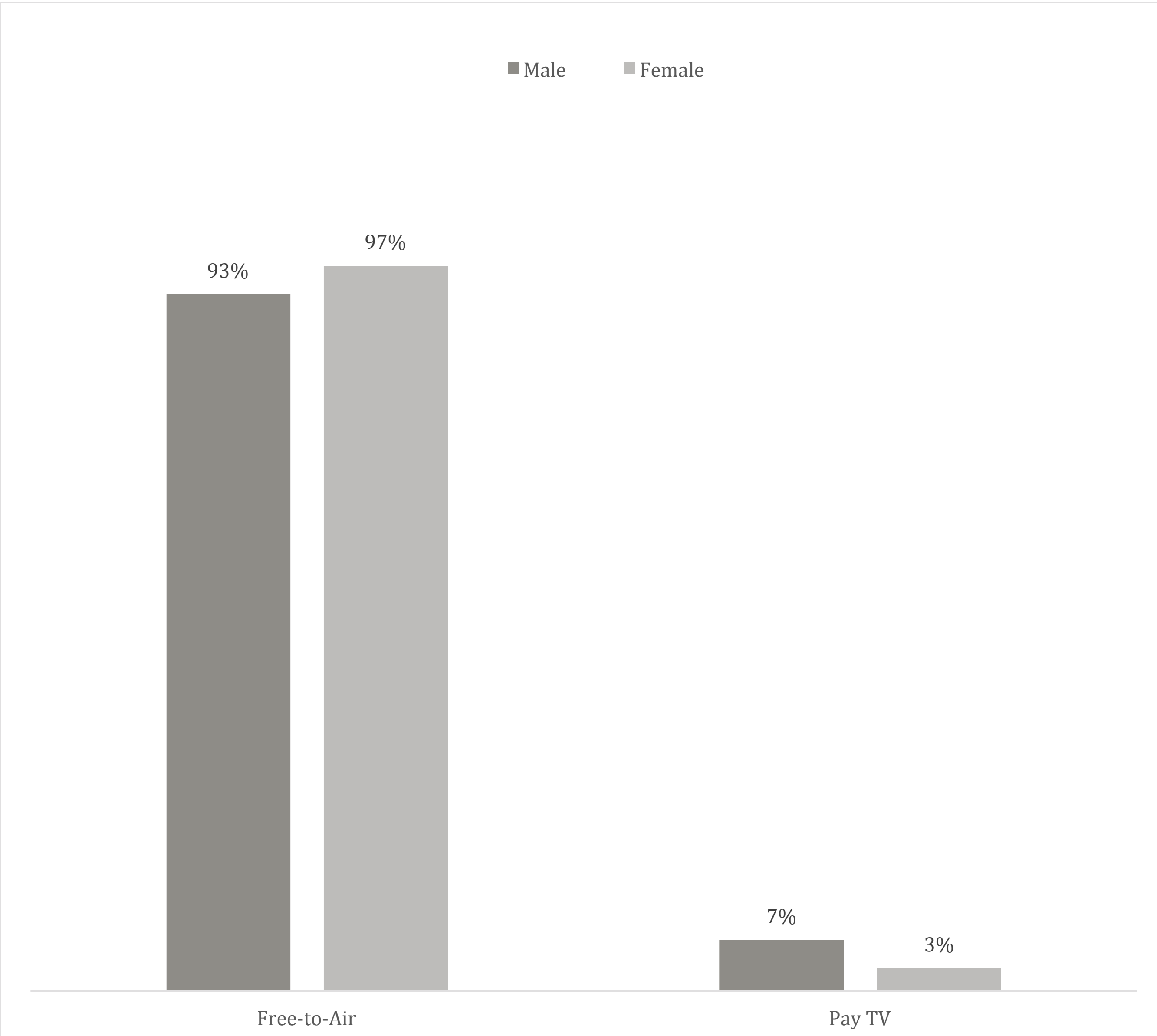


Chart 5: Male TV viewers are higher in slightly higher on the Pay TV, this again is due to sports on the Super sport.

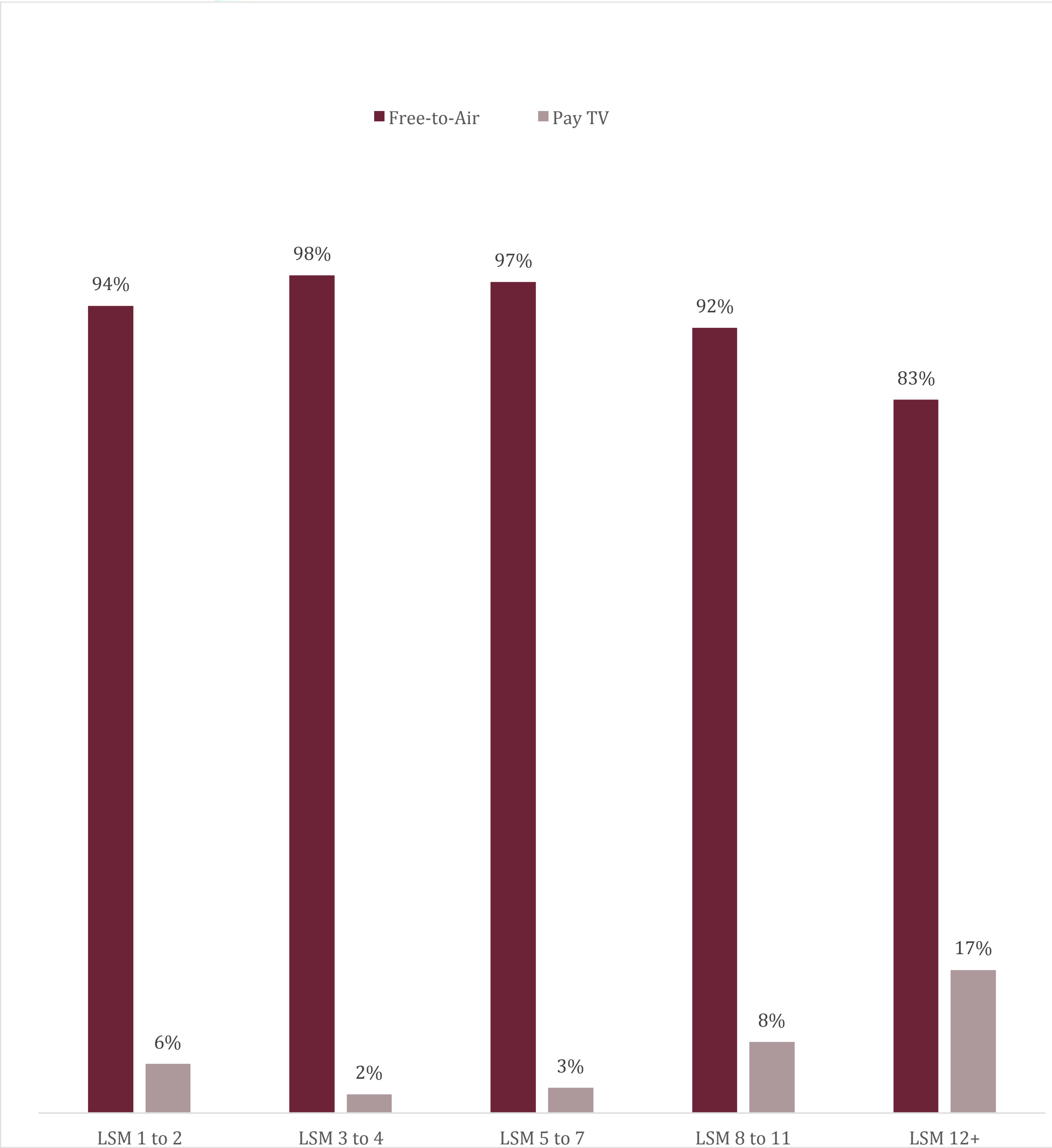


Chart 6: LSM 8-11 and LSM 12+ watch more of Pay TV than the rest of lower LSM levels.

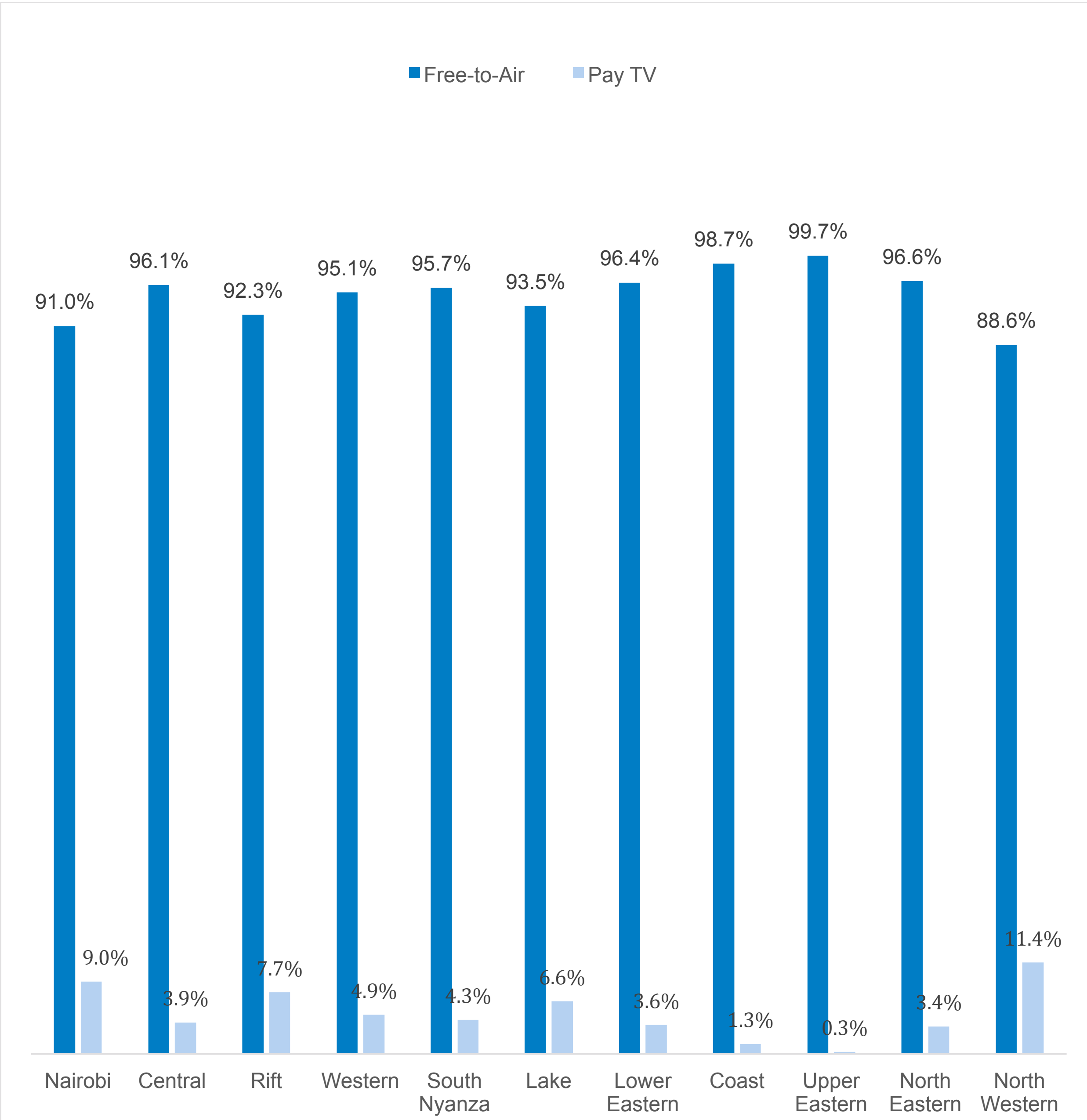


Chart 7: Nairobi and North Western topographies watch more of Pay TV compared to the rest of the topos, North Western could be attributed to the weak signals of the Free to Air channels. While Nairobi is driven by sports.

Free-To-Air stations Viewership

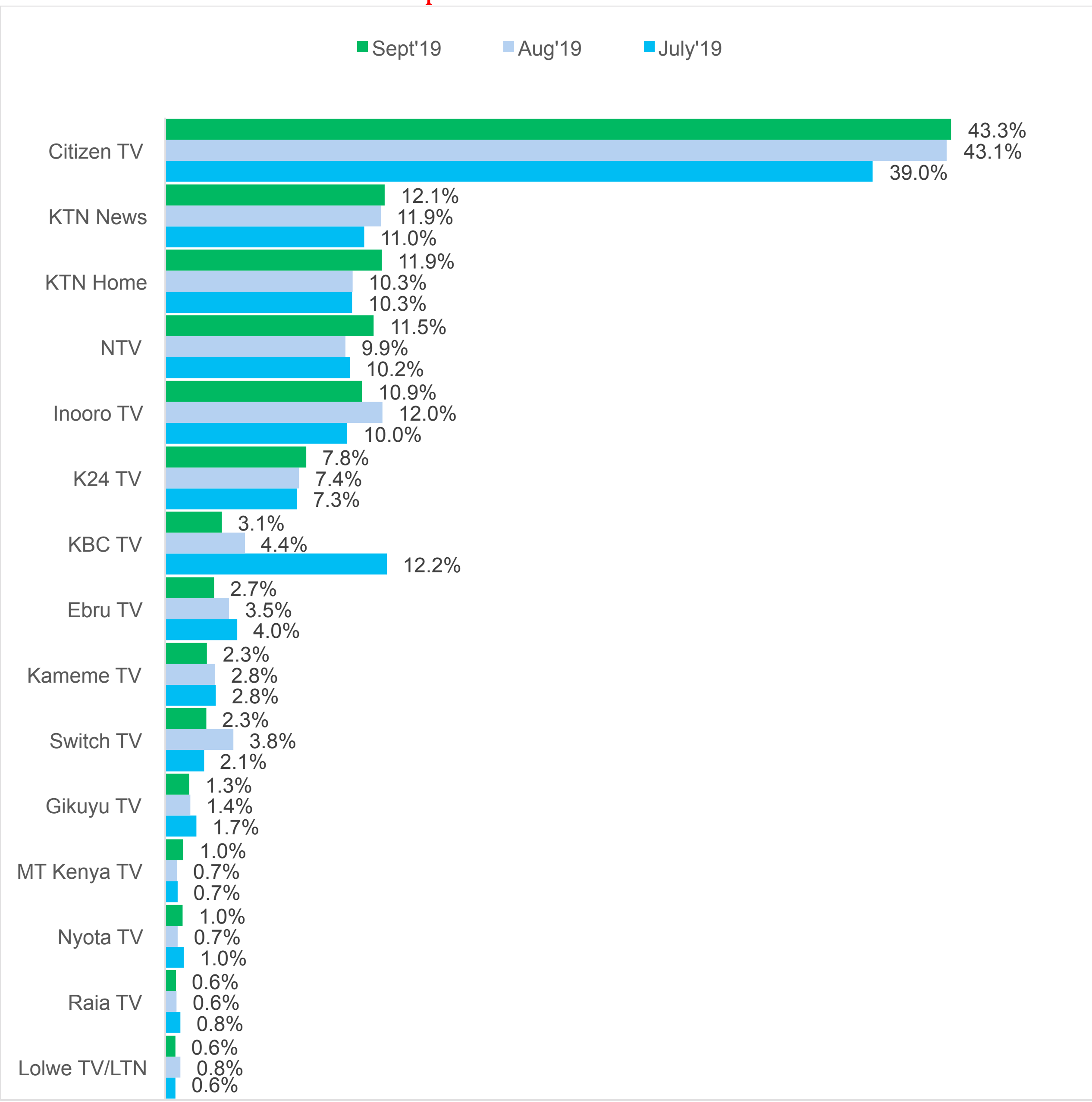
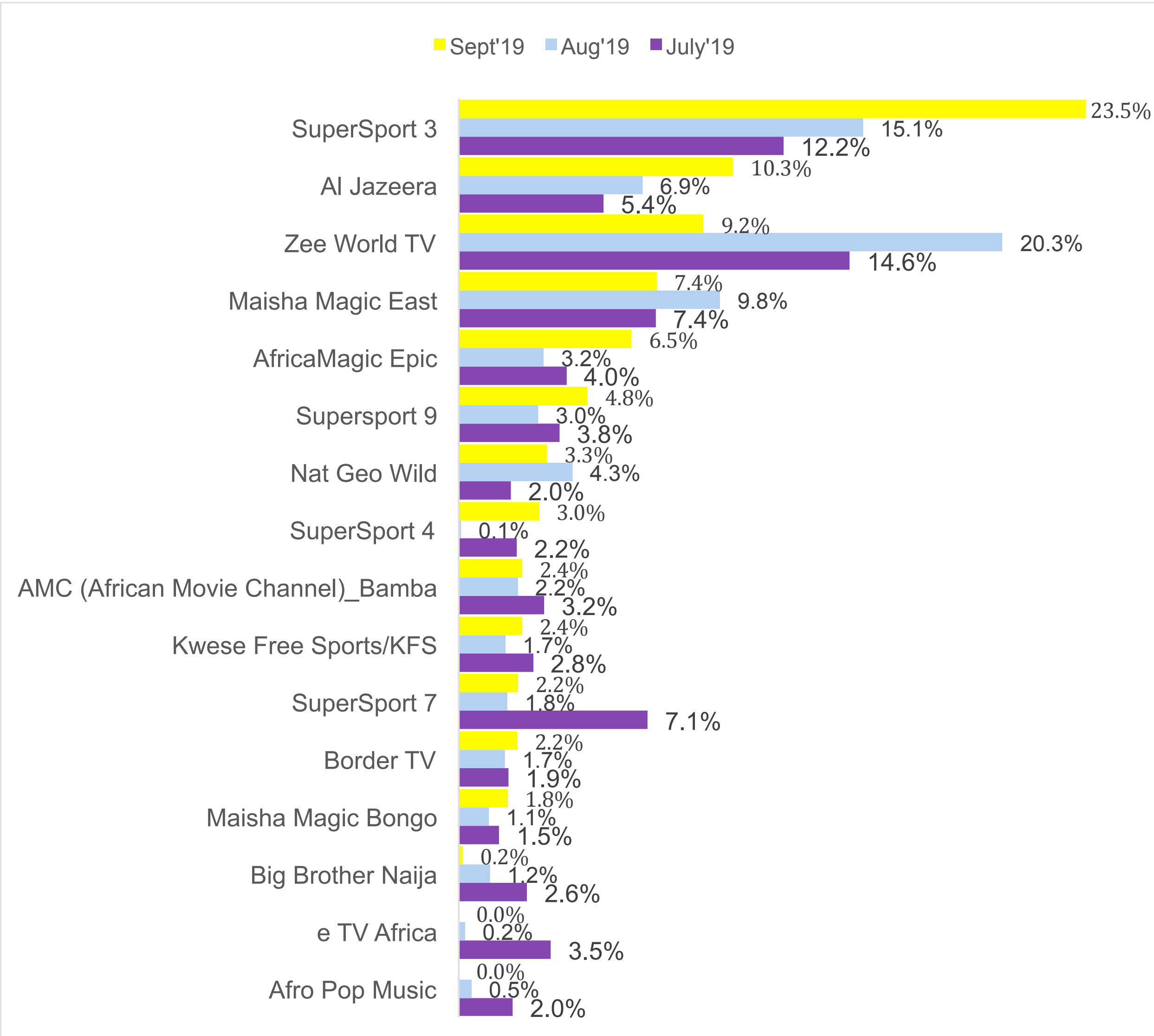


Chart 8: Citizen TV, KTN News and KTN Home are ranked as the most popular top three Free-to-Air stations across the 3 months. KBC TV declined by 8% in September after the AFCON tournament.

Pay TV – Channels Viewership



N=Pay TV Viewers 400,533

Chart 9: Sports mainly football, drama and International News seem to be the key drivers of PAY TV channels.
This evident as Super sport channels, Al Jazeera and Zee world are the most watched channels.

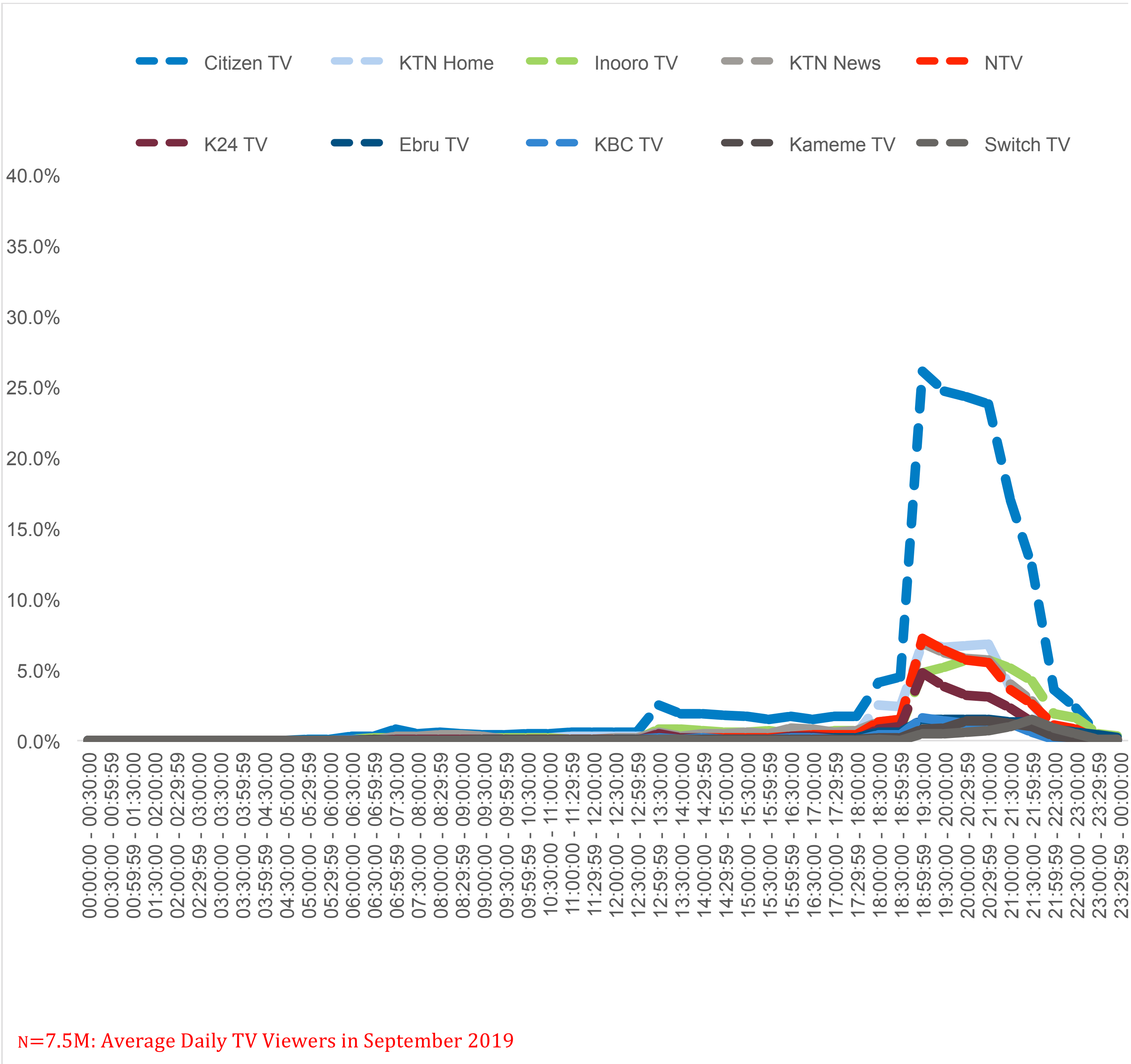


Chart 9: TV is an evening media channel, picks as from 1800hrs – 2200hrs in the evening. Just as the reach, Citizen TV is rated higher than the rest of the stations.

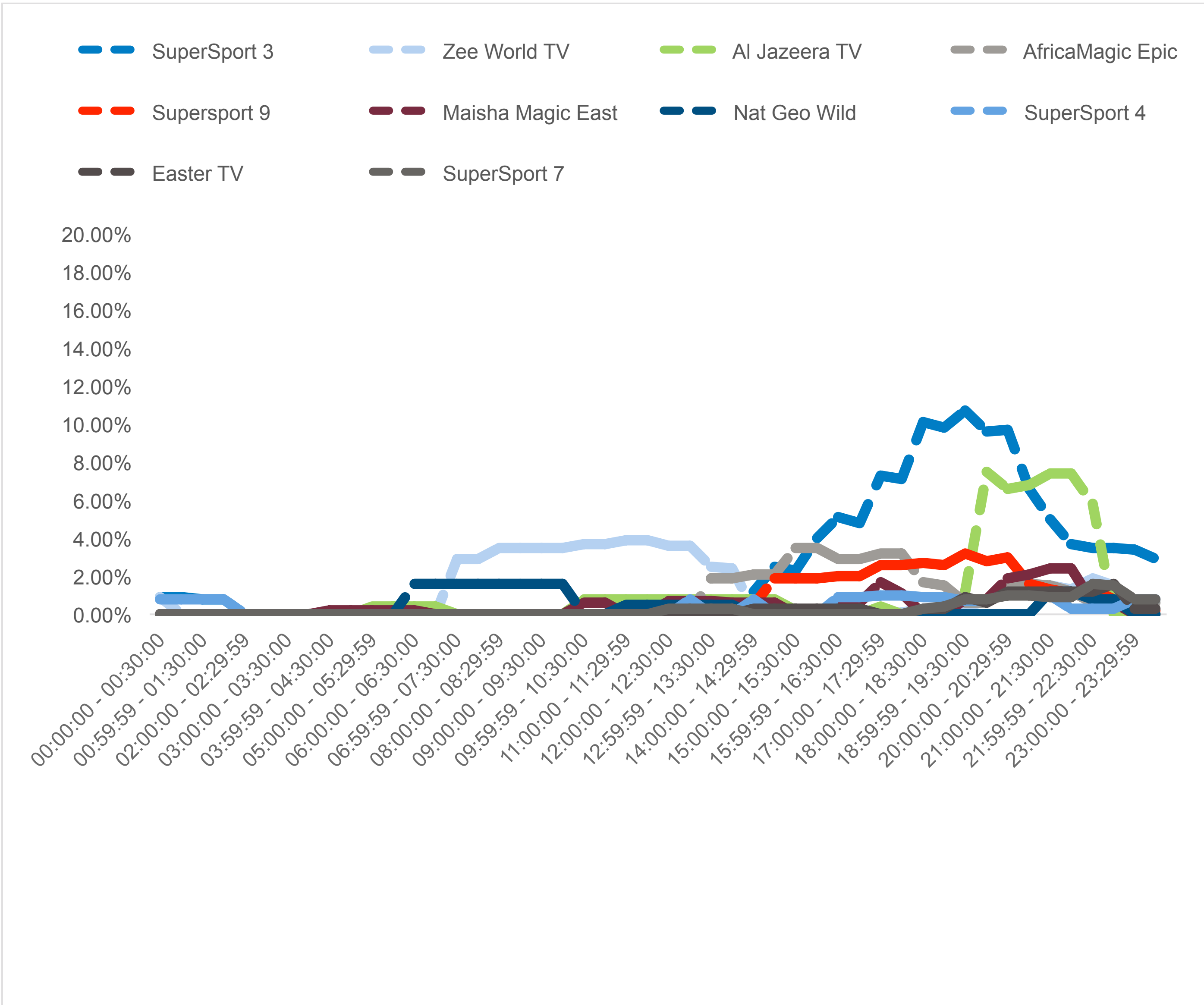
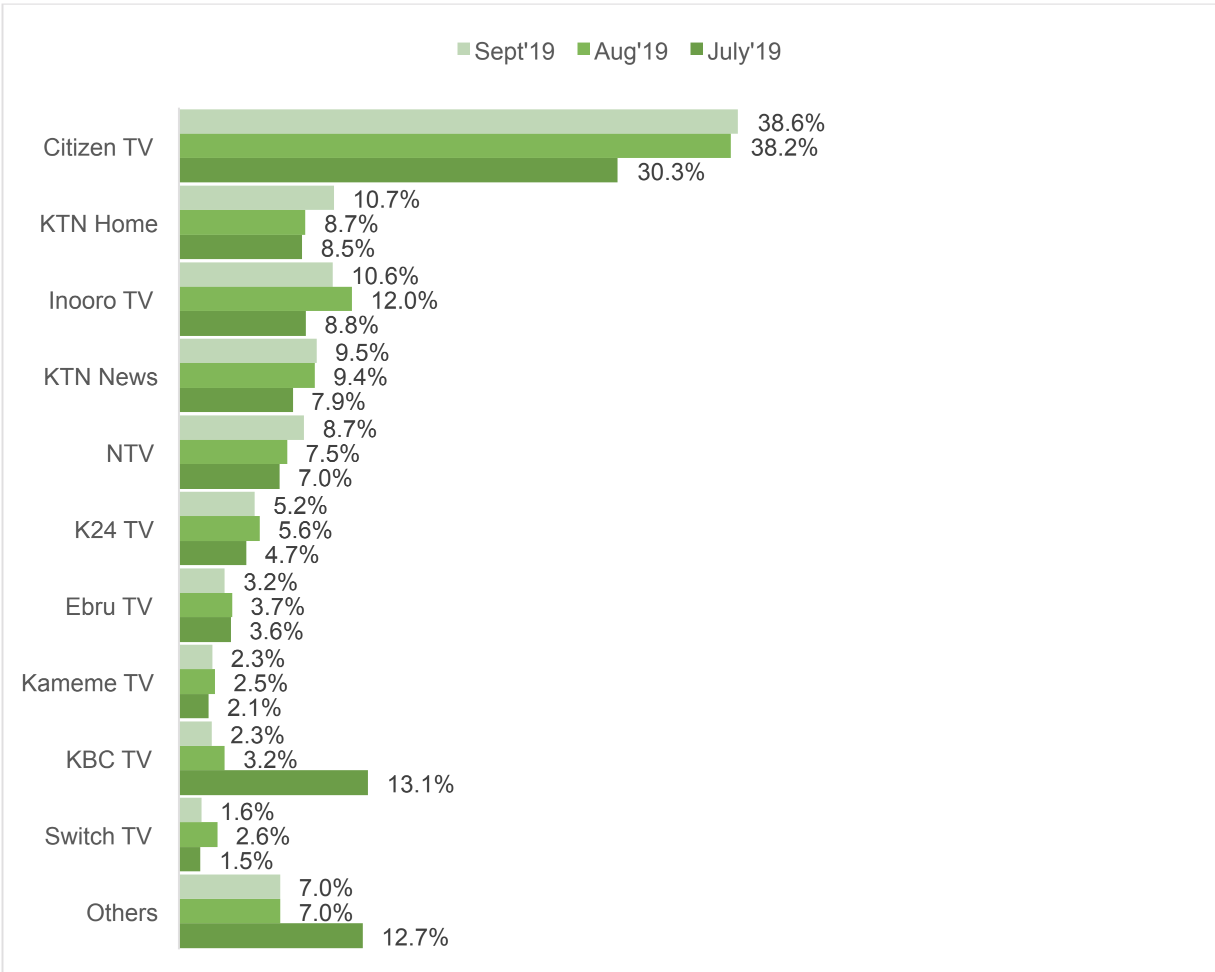


Chart 10: Nat Geo Wild and Zee World, are rated higher on the morning hours 8am – 1400hrs. Super sport channels pick during the afternoon (1500hrs – 1000hrs) when EPL is being aired, Al Jazeera also has a spike in the evening for international News.

Share of Free-To-Air TV Channels (July – September 2019)



N=7.5M: Average Daily TV Viewers in September 2019

Chart 11: Similarly, as the reach, Citizen TV tops in the share of Free to Air channels, gaining from KBC TV in August and September after gaining from the AFCON broadcast

Share of Pay TV Channels (July – September 2019)

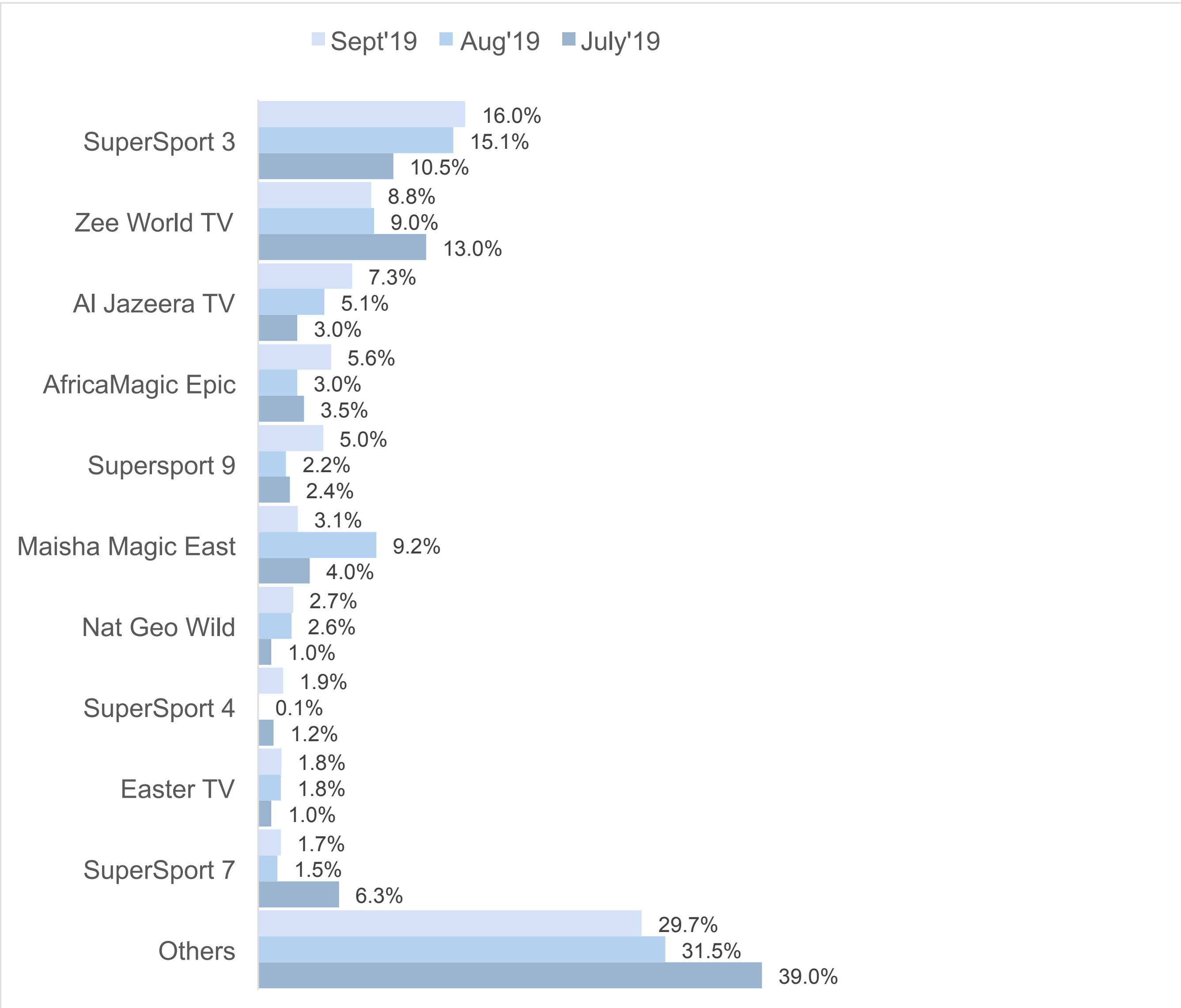


Chart 12:

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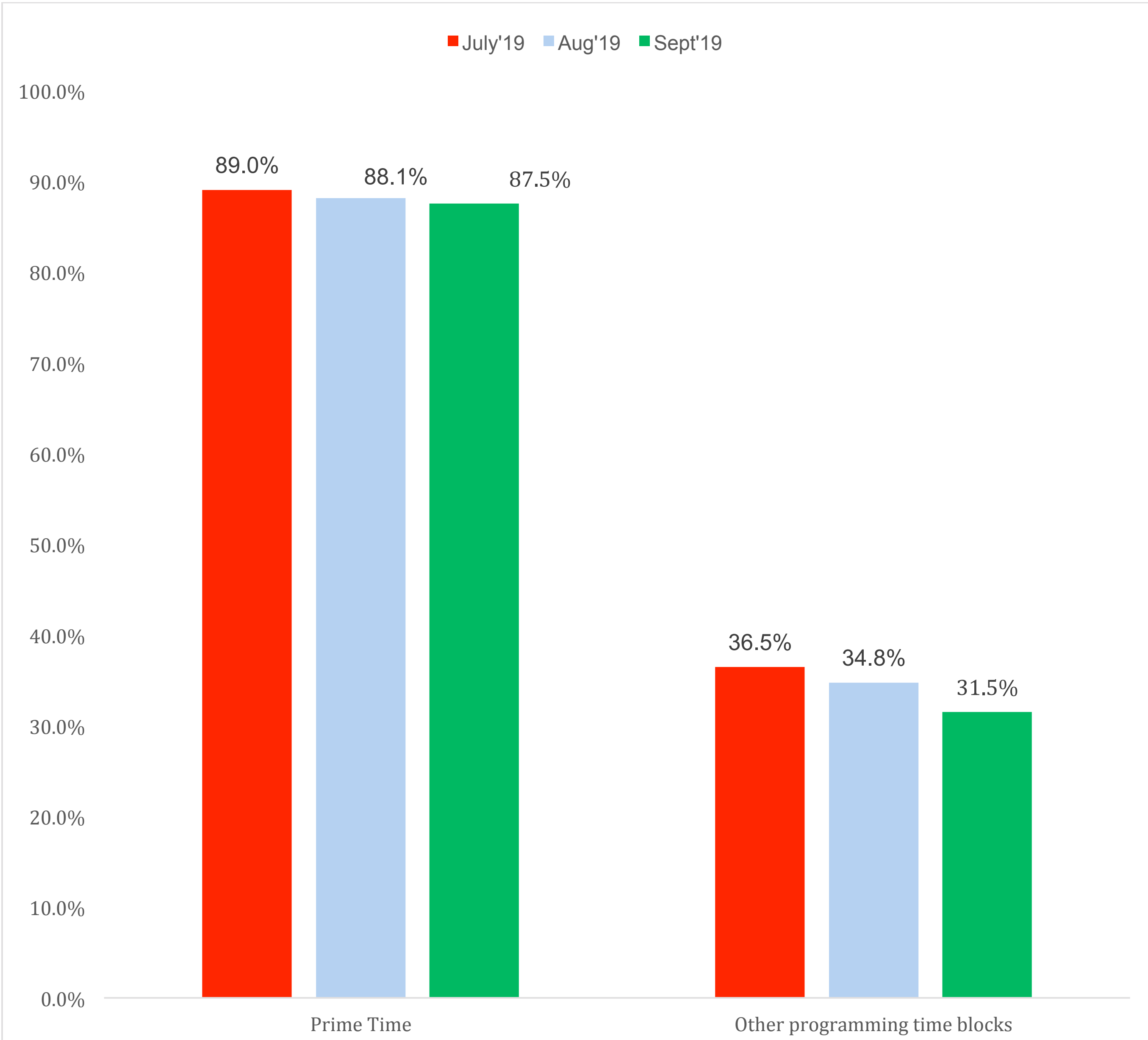
MEDIA CONSUMPTION HABITS BY PRIME TIME AND OTHER TIME SEGMENTS



N=7.5M: Average Daily TV Viewers in September 2019

Chart 13:TV Viewership is predominantly during prime time (1800hrs – 2200hrs), its ranked at averagely over 80% across the 3 months as compared to the rest of the time segments, this is because TV requires active visual participation which is not possible as consumers engage in other activities during the day.

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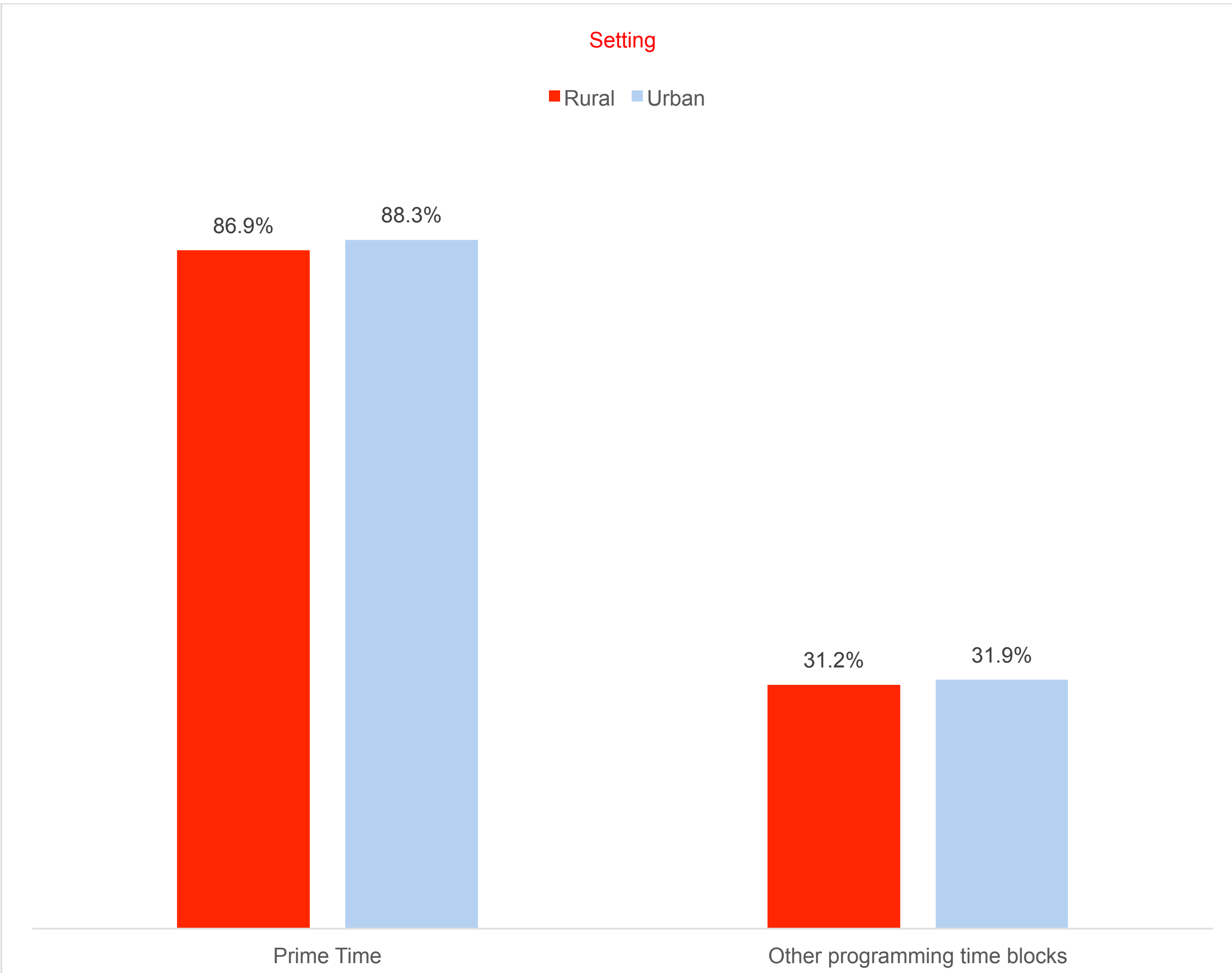

N=7.5M: Average Daily TV Viewers in September 2019

Chart 14: There is no major difference in terms of consumption during prime time among rural and urban consumers.

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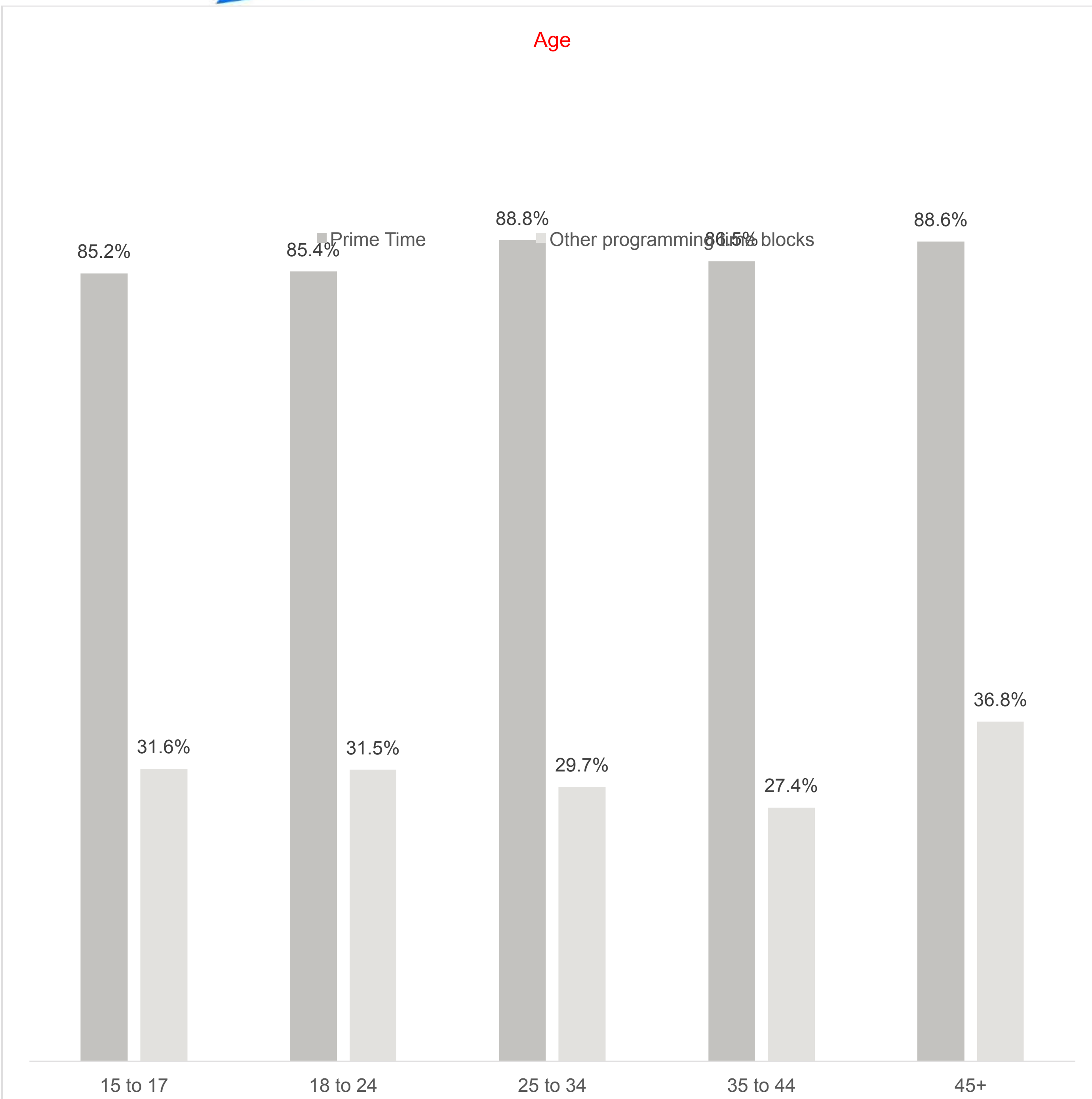

N=7.5M: Average Daily TV Viewers in September 2019

Chart 15: The older segment of 45+ seems to be watching TV during other programming time segments than the others age segments.

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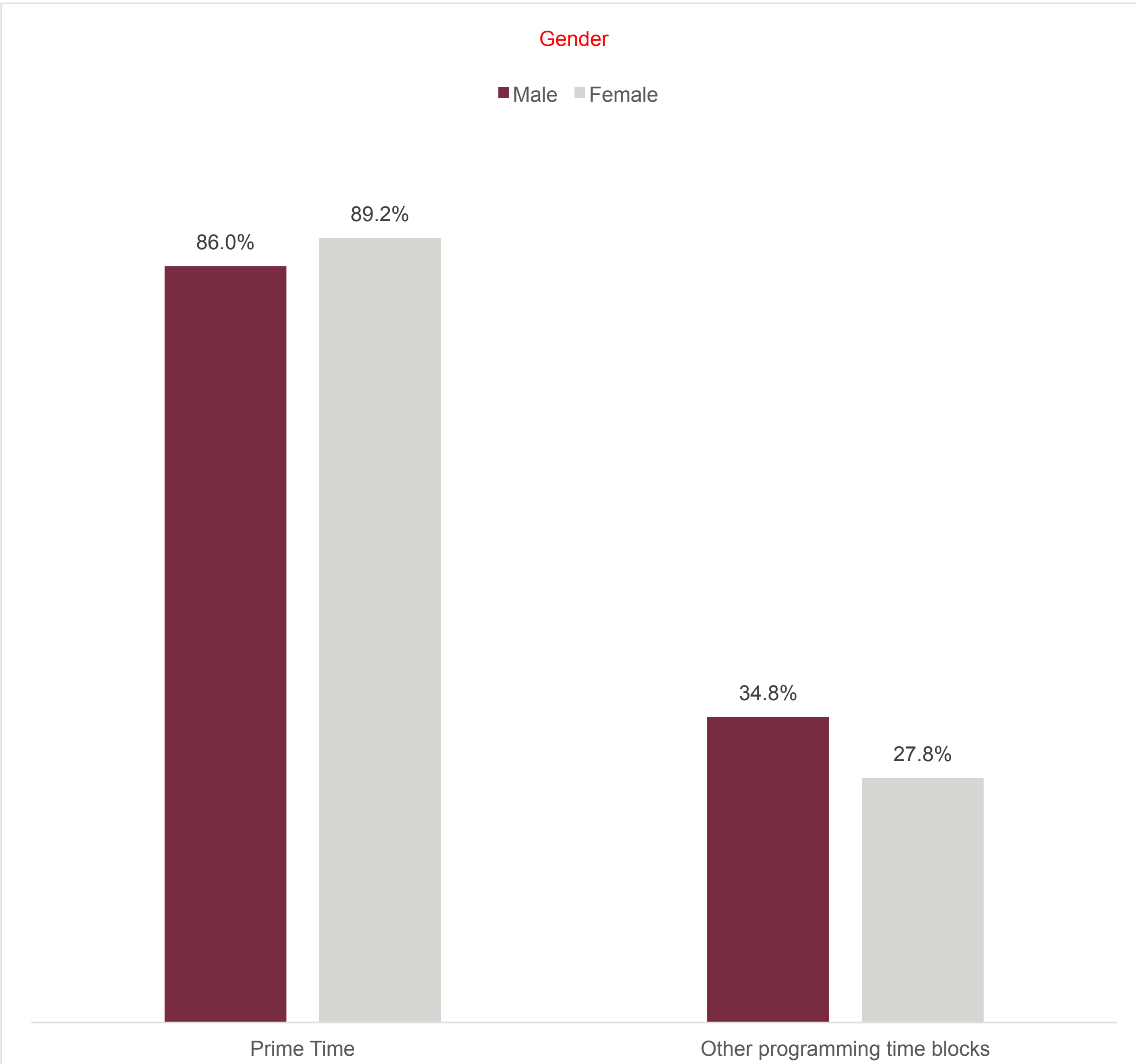
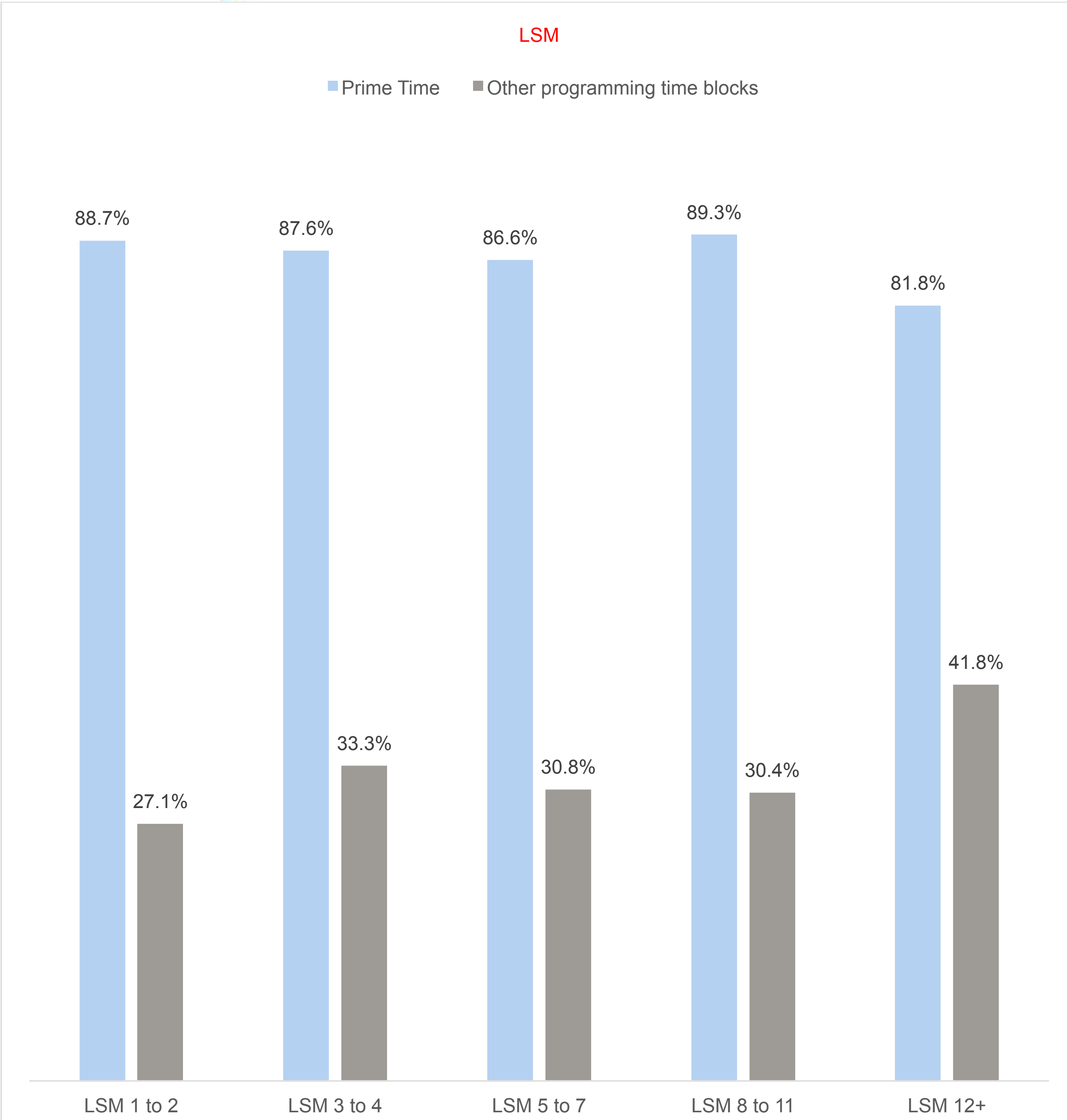


N=7.5M: Average Daily TV Viewers in September 2019

Chart 16:



N=7.5M: Average Daily TV Viewers in September 2019

Chart 17: LSM 12+ watch TV during other programming time segments than the lower LSM levels.

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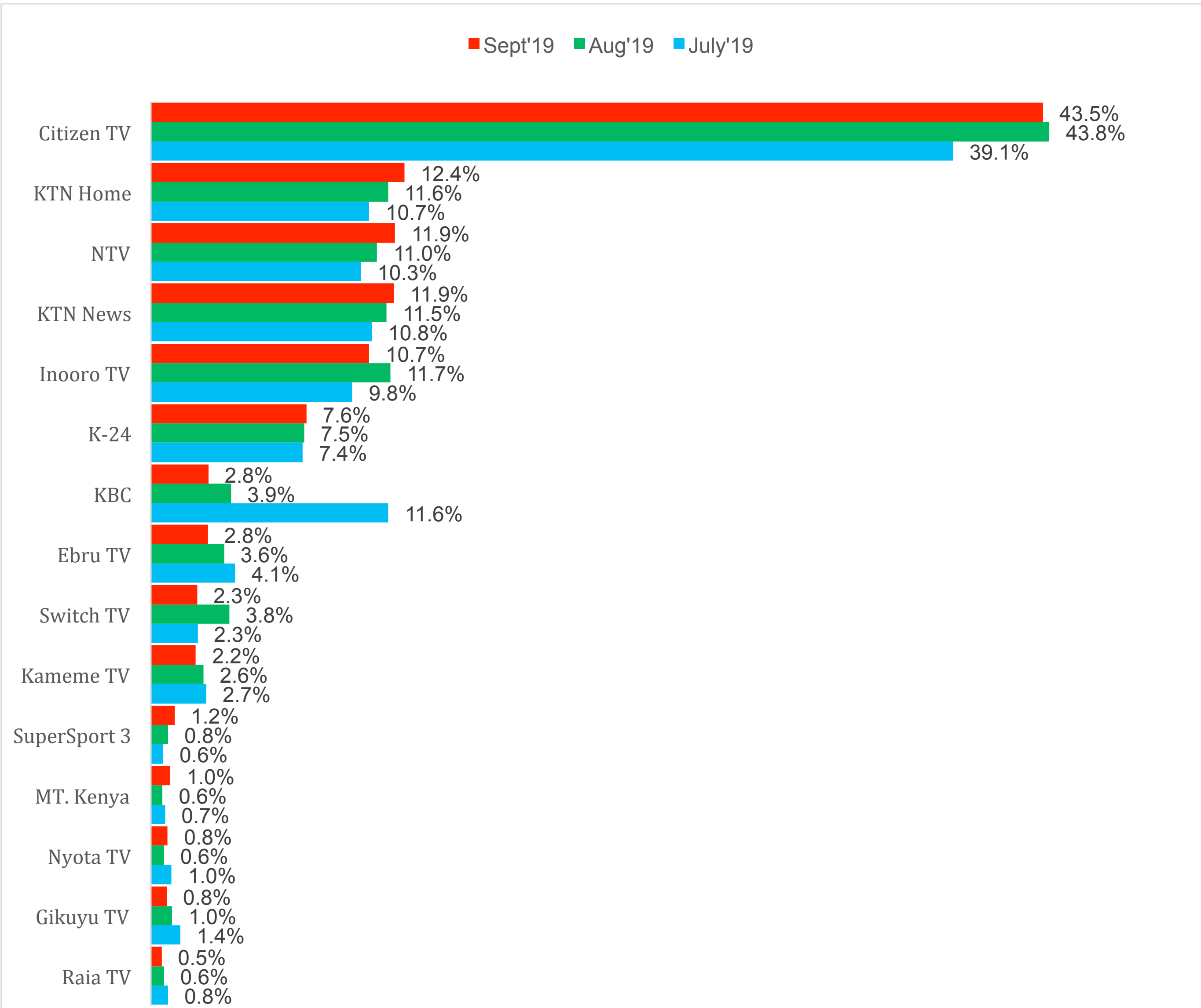
Prime Time Stations viewership



N=Prime Time Viewers6,944,360

Chart 18

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Other programming time blocks stations viewership

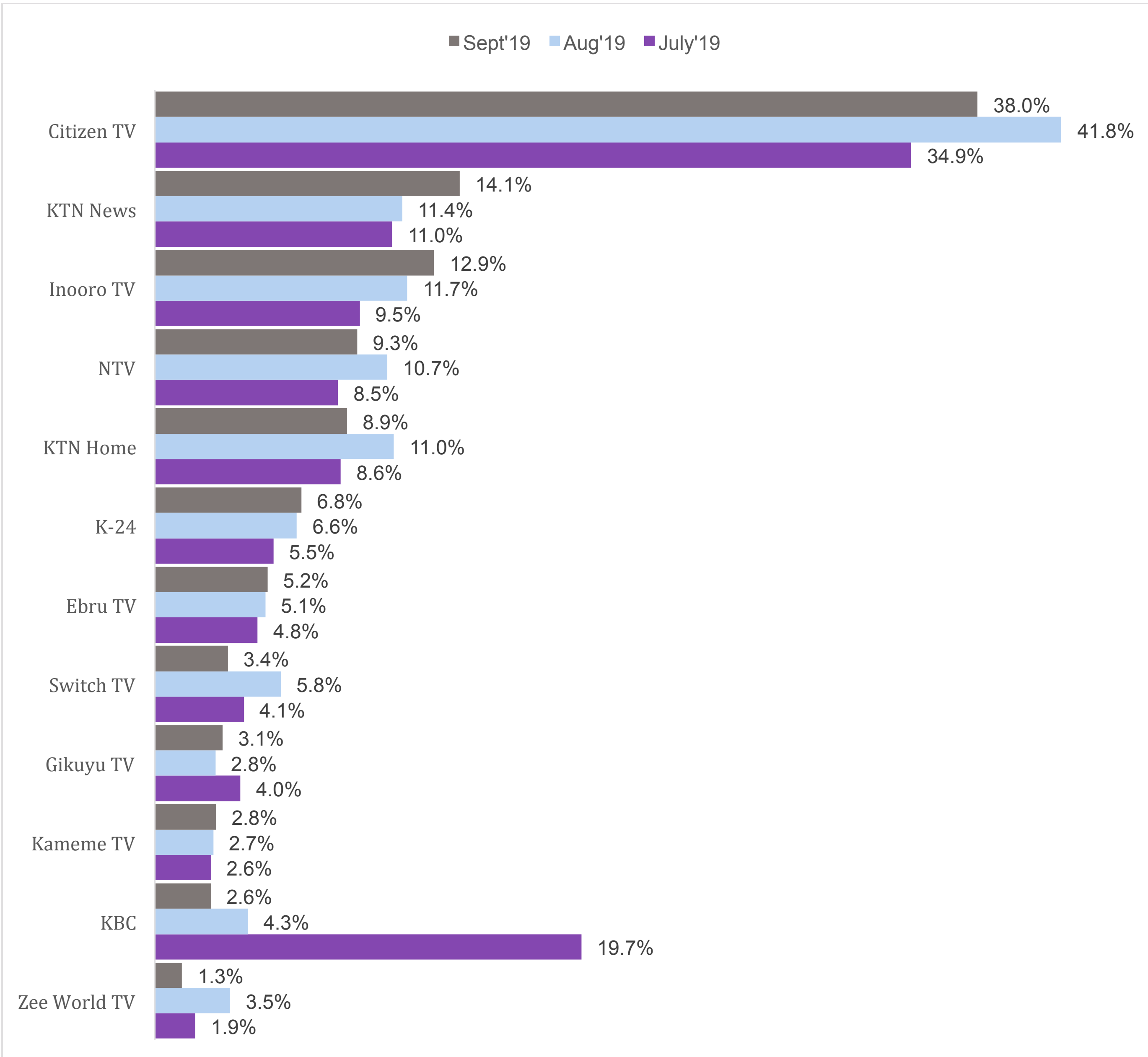
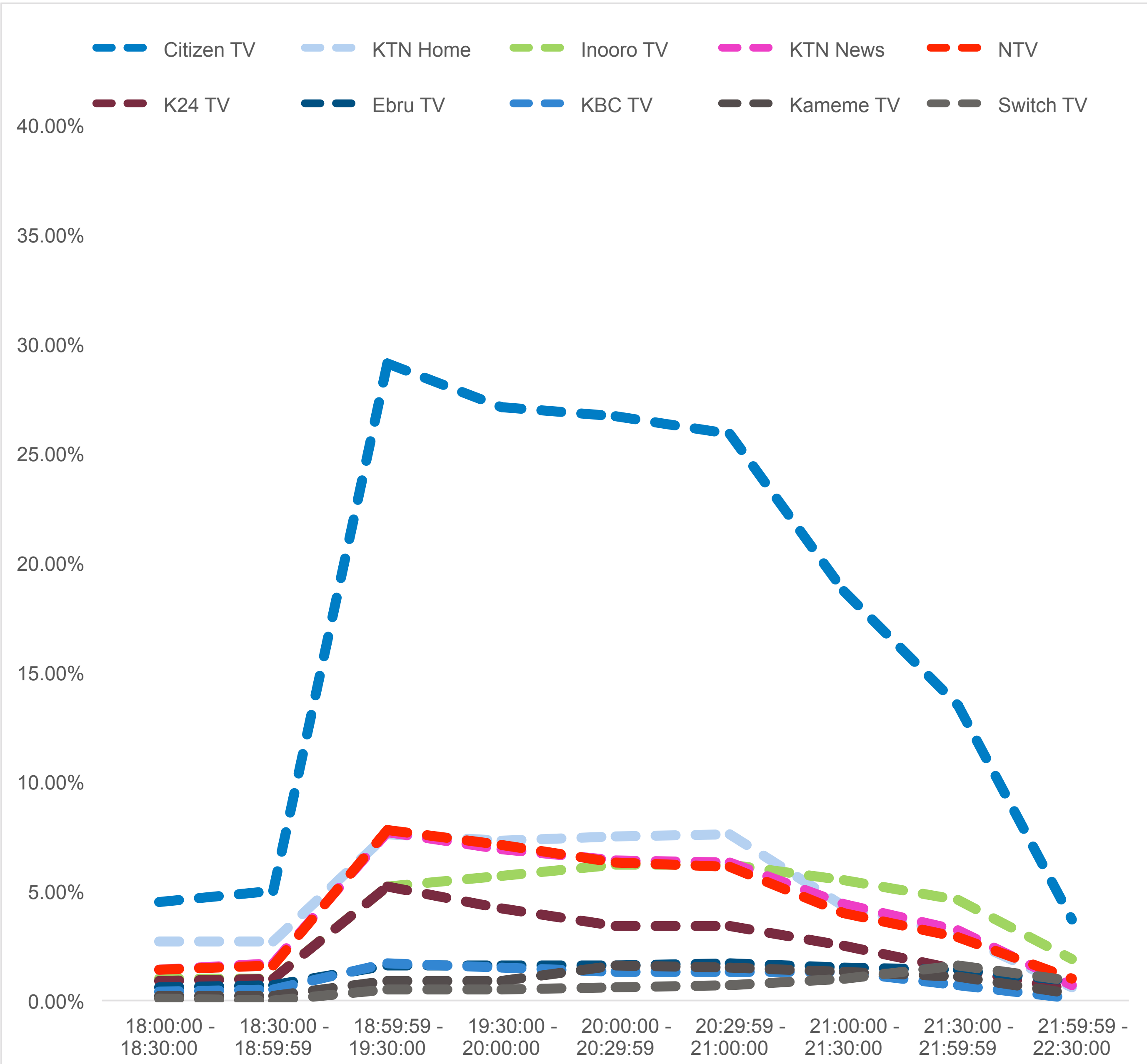


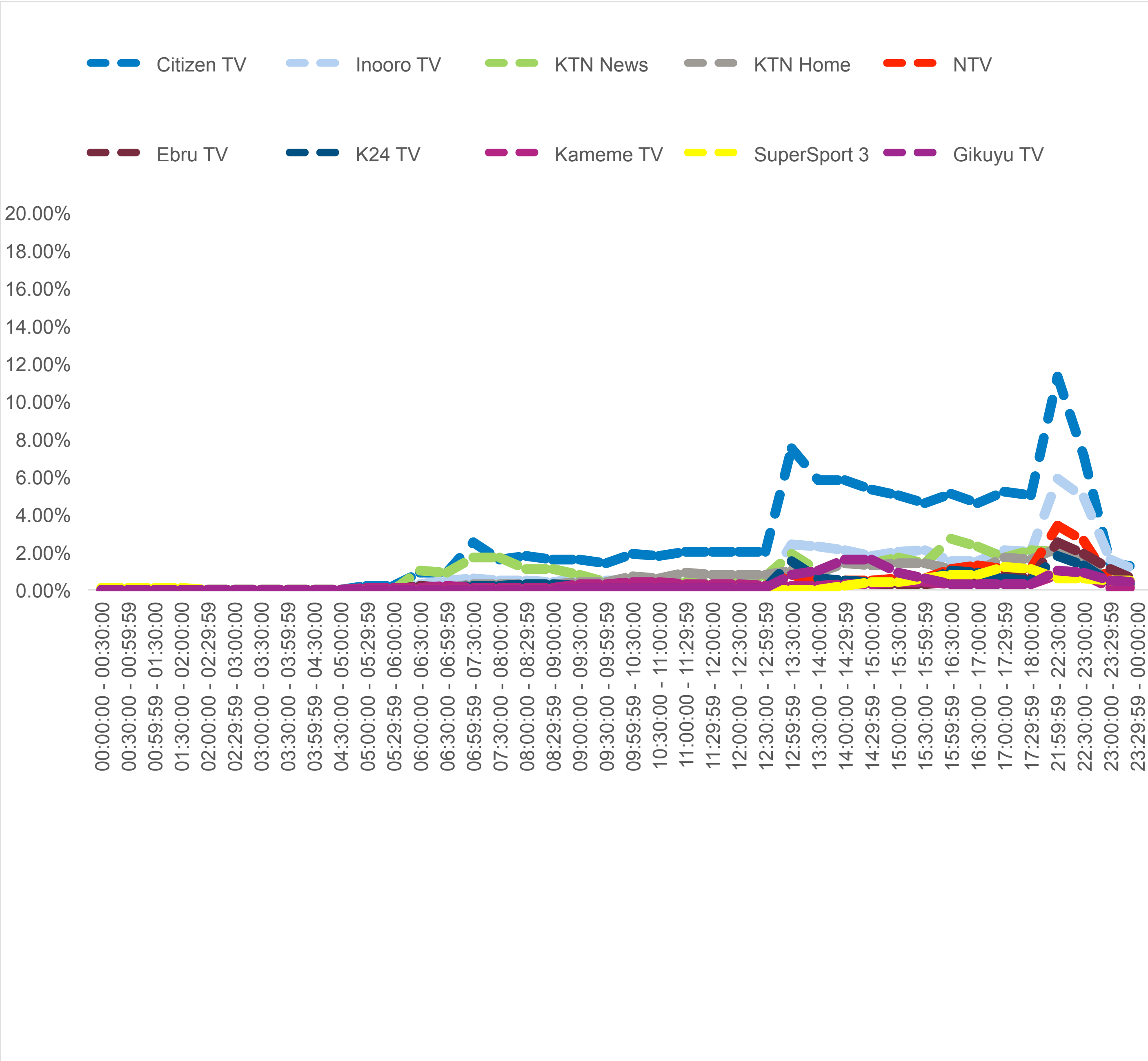
Chart 19

N=Other Programing time blocks Viewers 2,499,993



N=7.5M: Average Daily TV Viewers in September 2019

Chart 20



N=Other Programing time blocks Viewers2,499,993

Chart 21

RADIO LISTENERSHIP SECTION

Radio Listenership - National

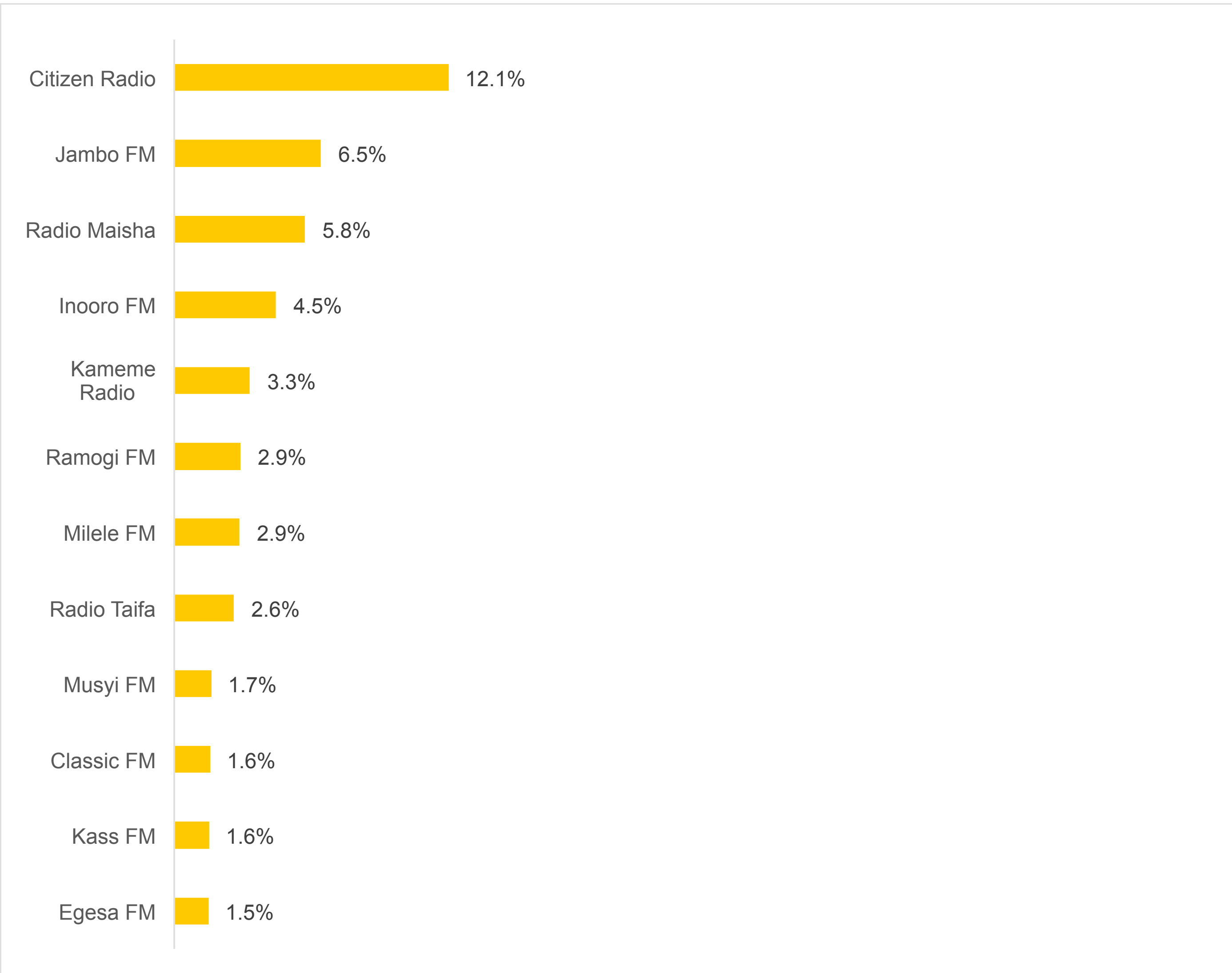


Chart 22

Radio Listenership by topographies (Regions) - Nairobi

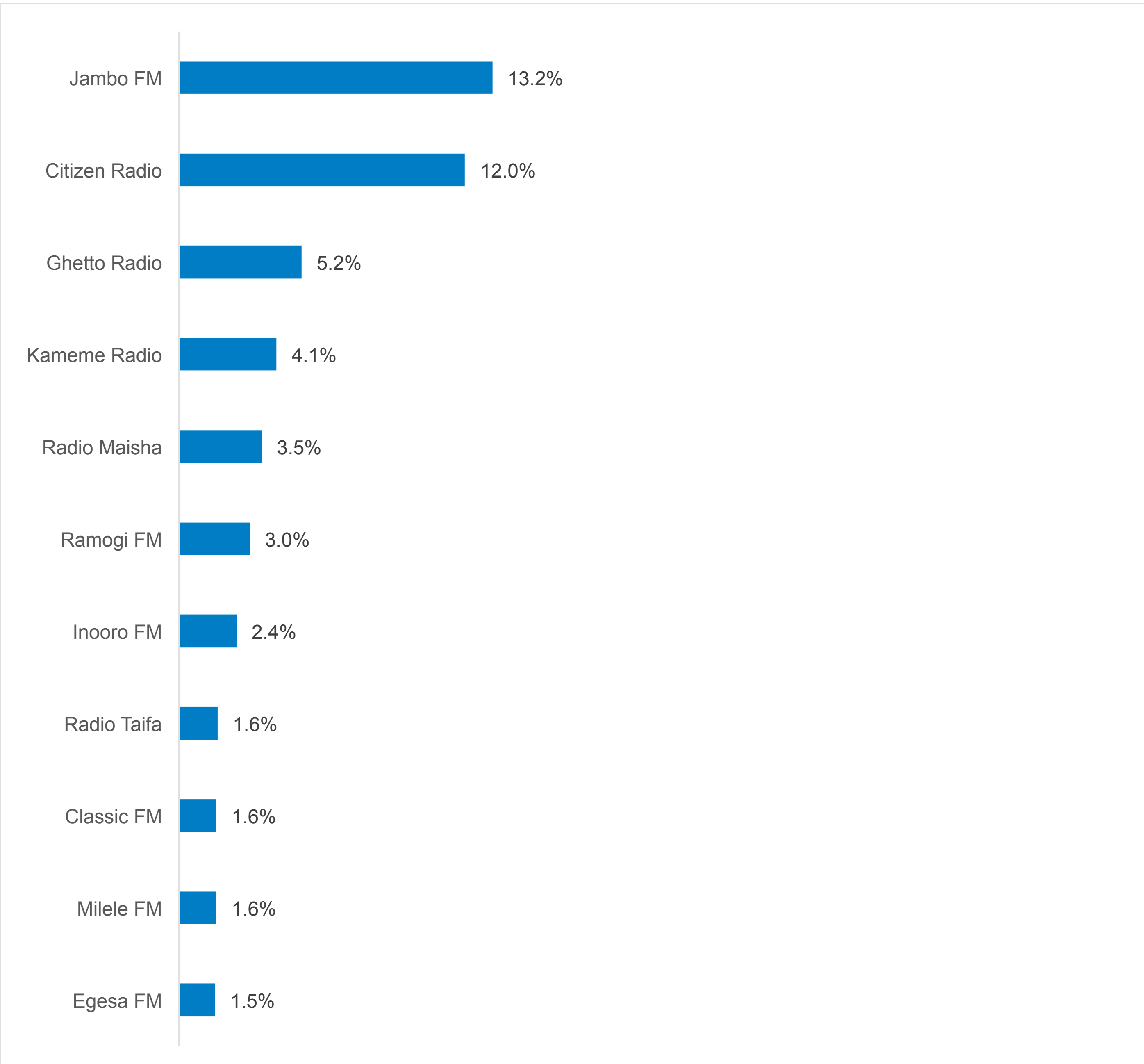


Chart 23

Radio Listenership by topographies (Regions) –**Central -**(Nyandarua, Nyeri, Kirinyaga, Muranga', Kiambu, Embu, Laikipia, Nakuru and Kajiado)

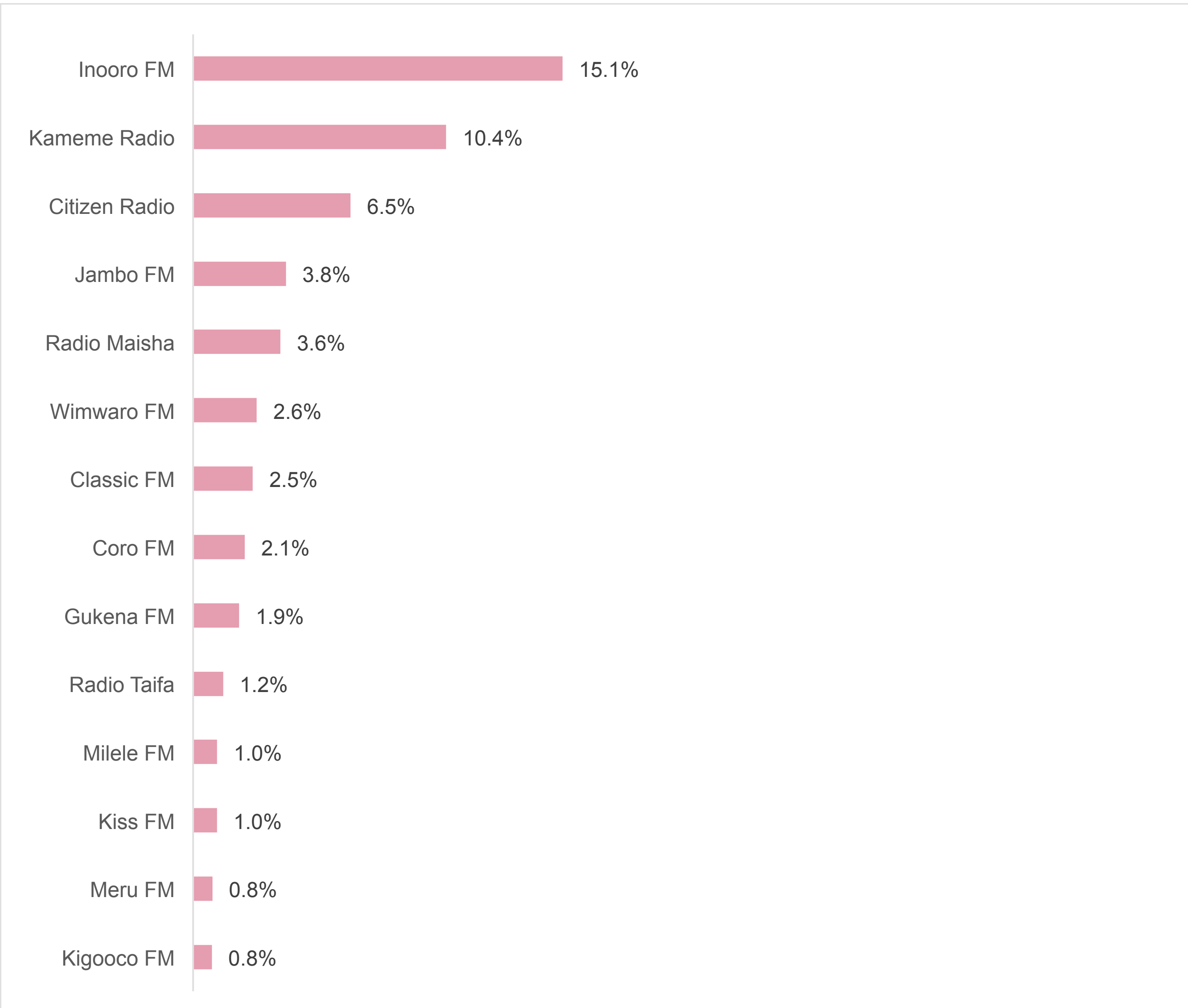


Chart 24

Radio Listenership by topographies (Regions) - Rift - (Baringo, Uashin Gishu, Elgeyo Marakwet, Nandi, Narok, Kericho and Bomet)

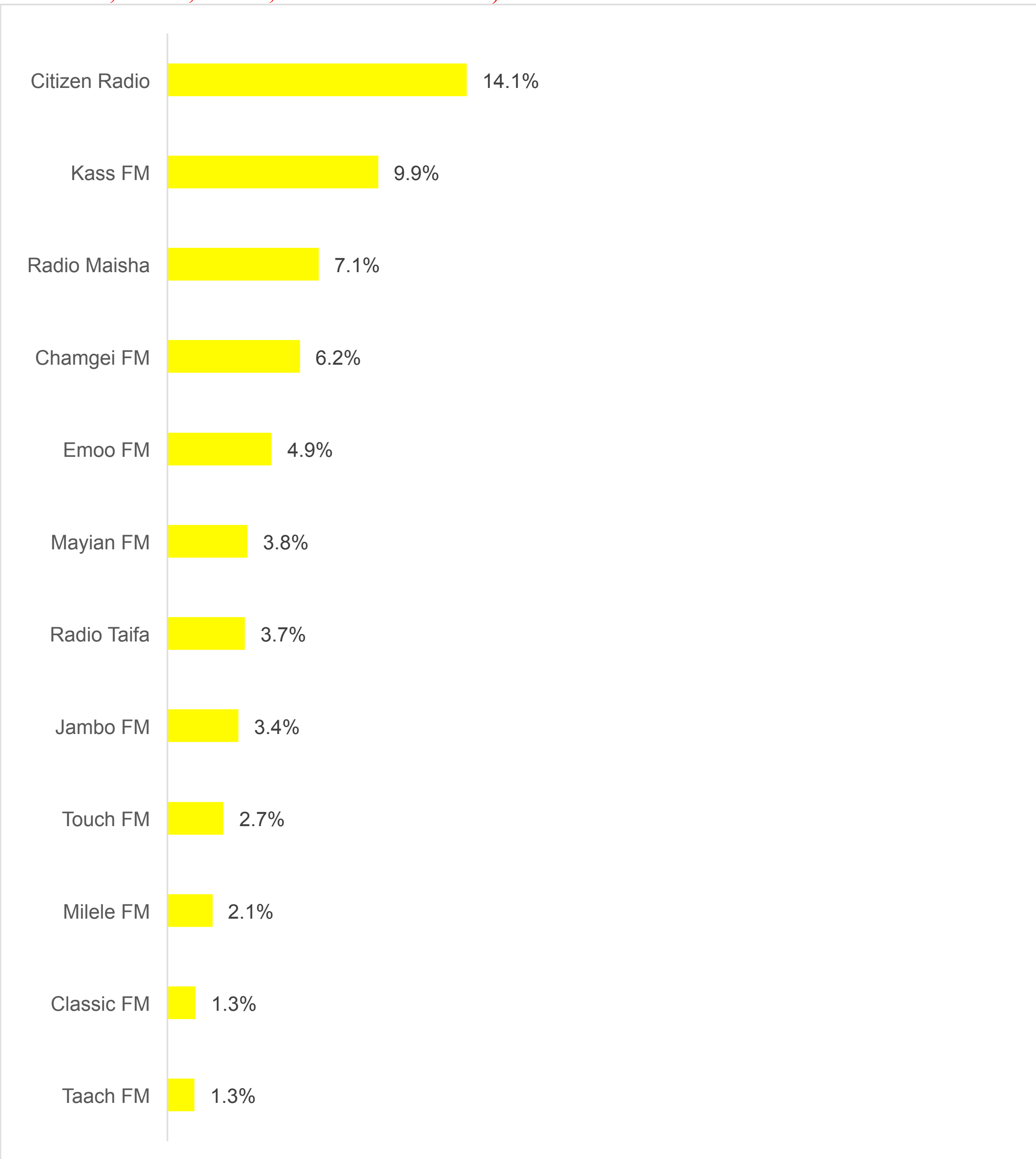


Chart 25

Radio Listenership by topographies (Regions) - **Western** - (West Pokot, Trans Nzoia, Kakamega, Bungoma, Vihiga and Busia)

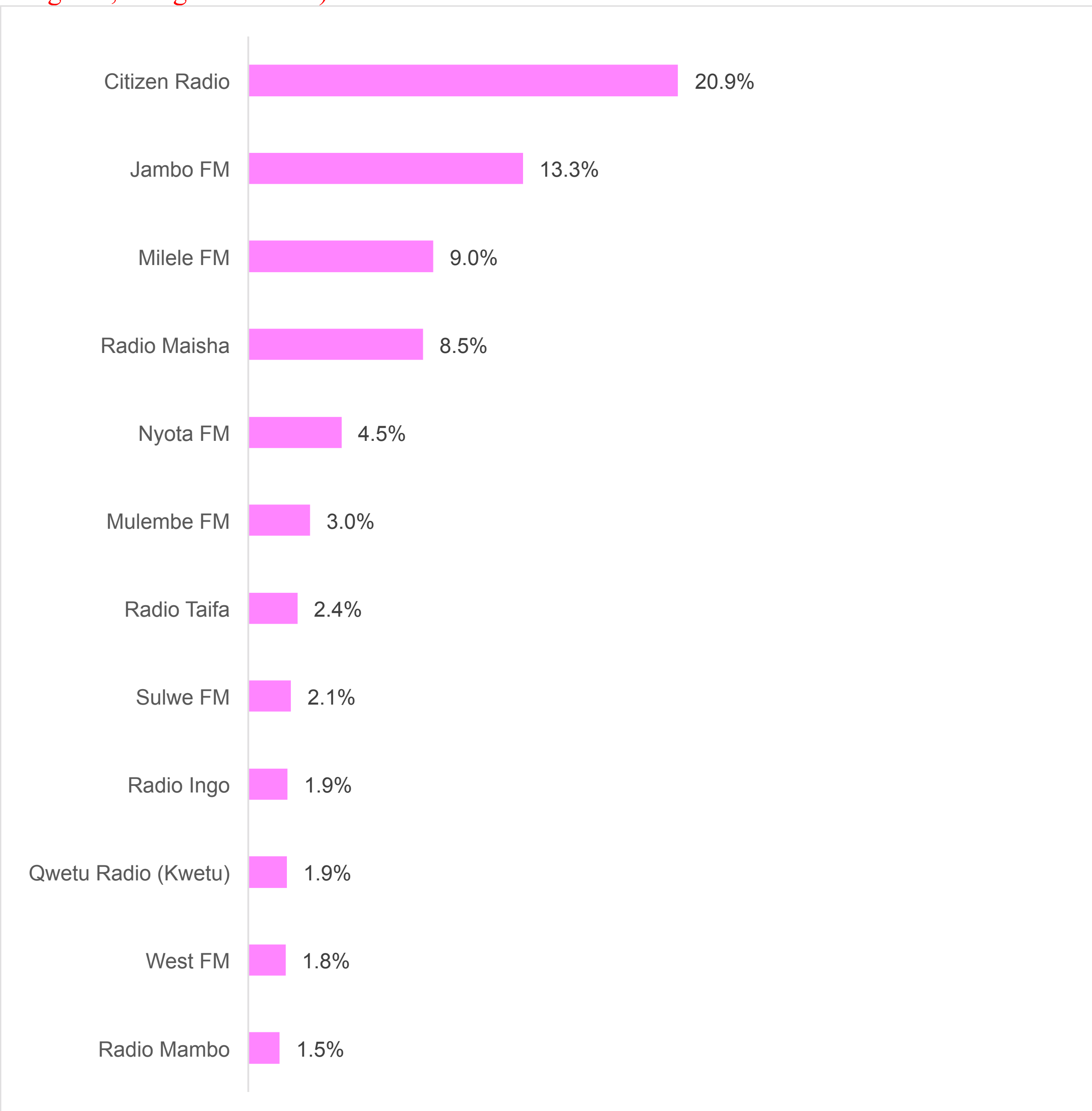


Chart 26

Radio Listenership by topographies (Regions) – **South Nyanza** - (Kisii and Nyamira)

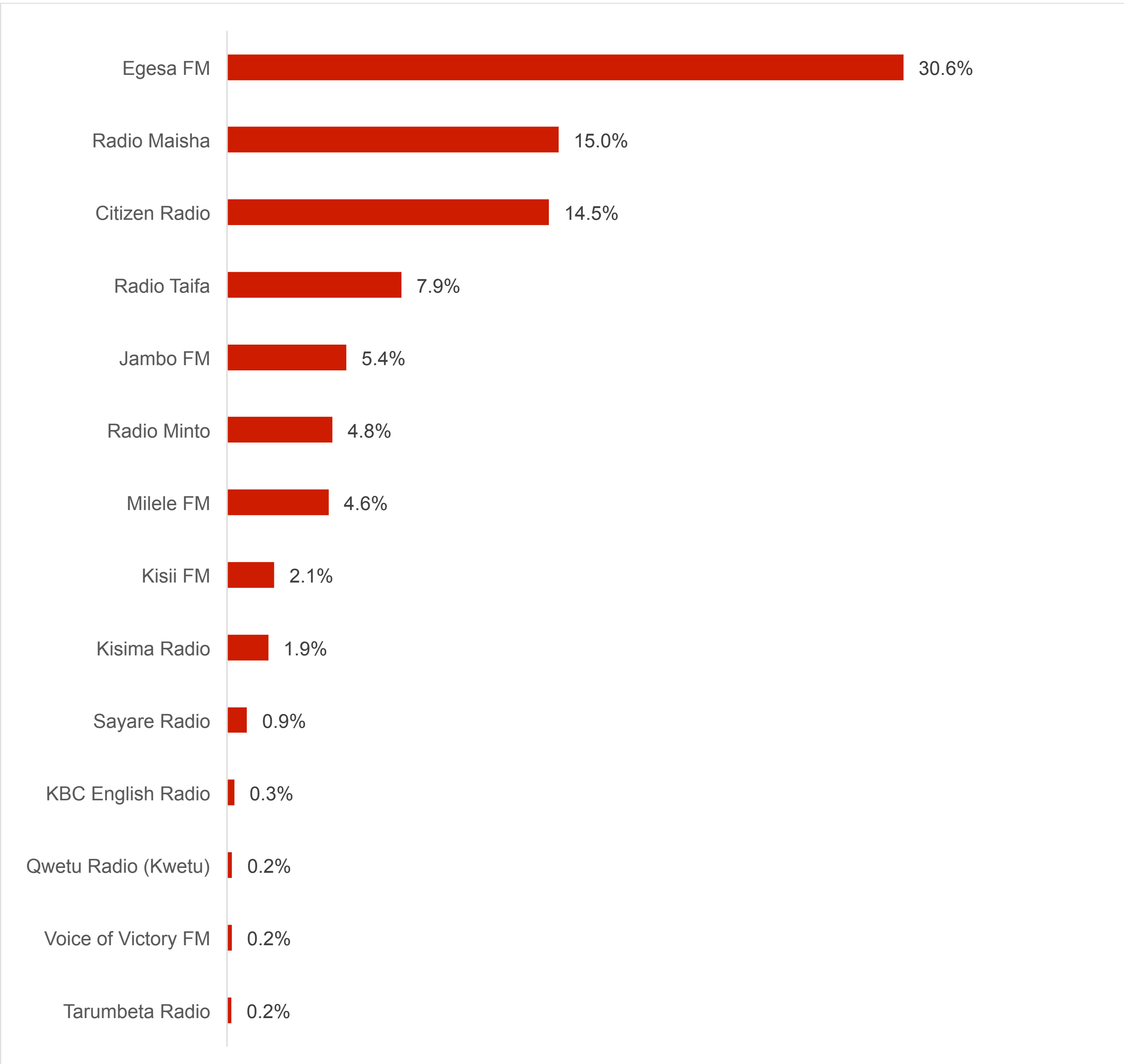


Chart 27

Radio Listenership by topographies (Regions) – **Lake**- (Kisumu, Siaya, Homa-Bay and Migori)

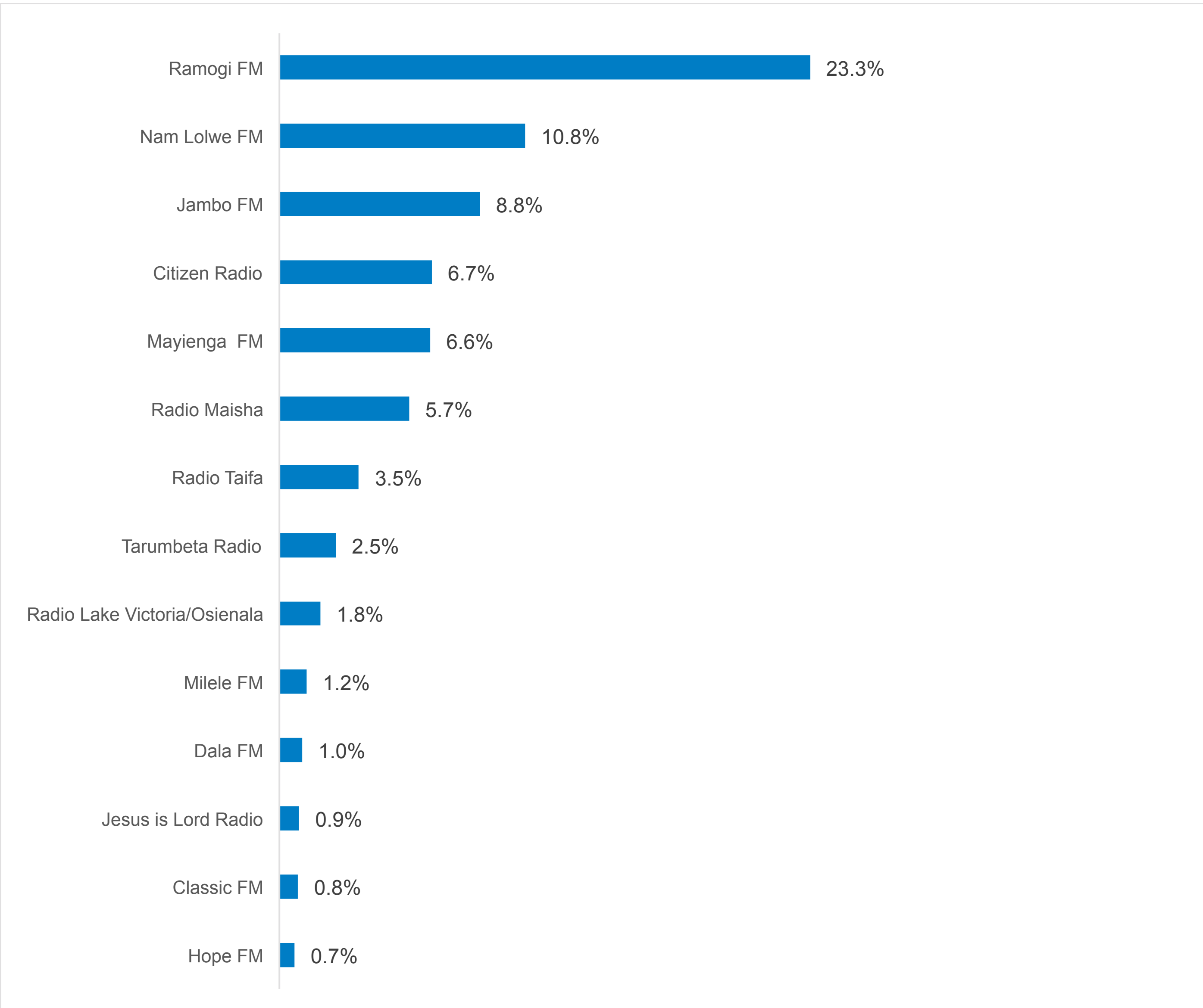


Chart 28

Radio Listenership by topographies (Regions) – **Coast**- (Mombasa, Kilifi ,Kwale, Tana River, Lamu and Taita Taveta)

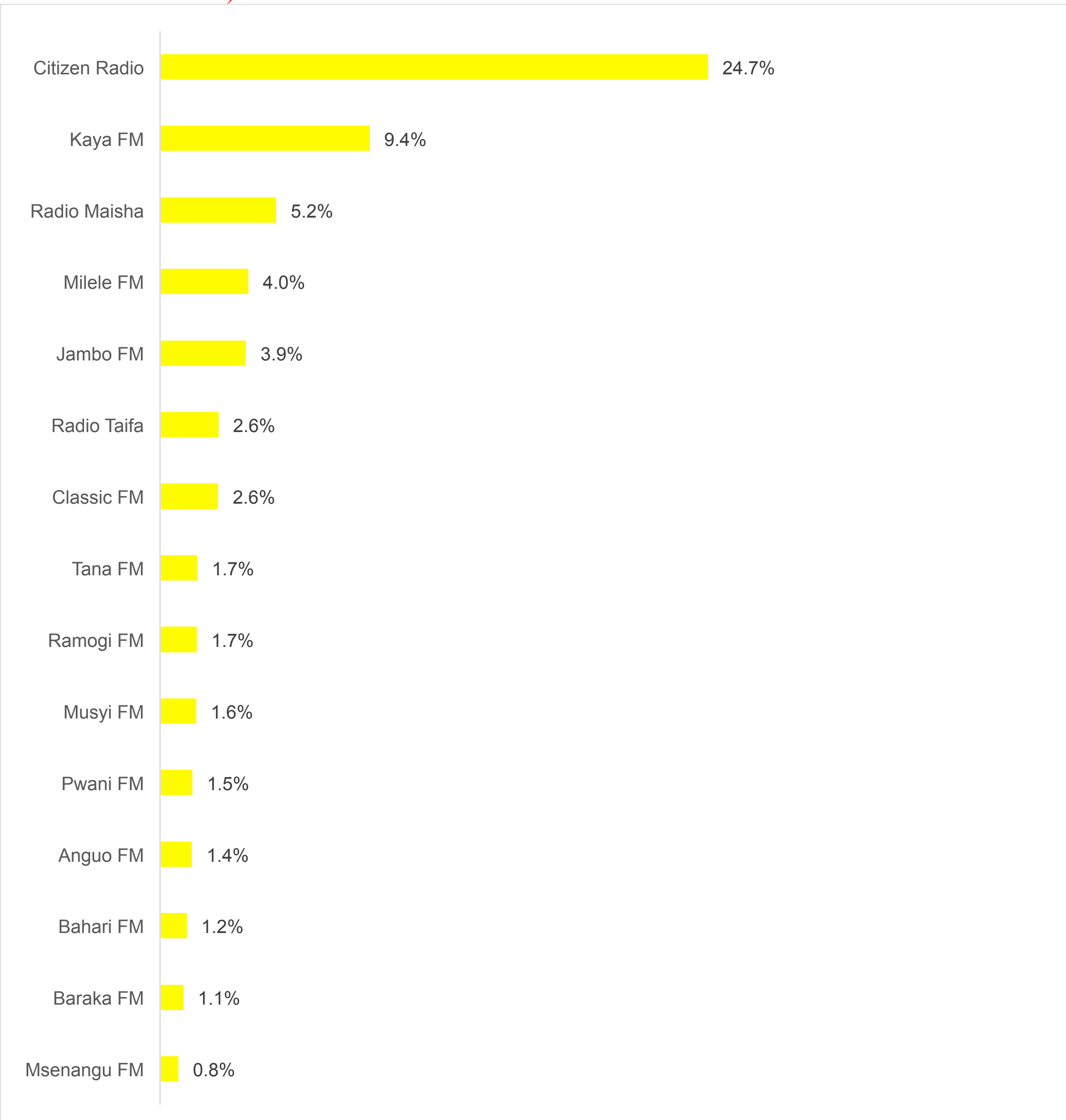


Chart 29

Radio Listenership by topographies (Regions) – **Lower Eastern-** (Kitui, Machakos and Makueni)

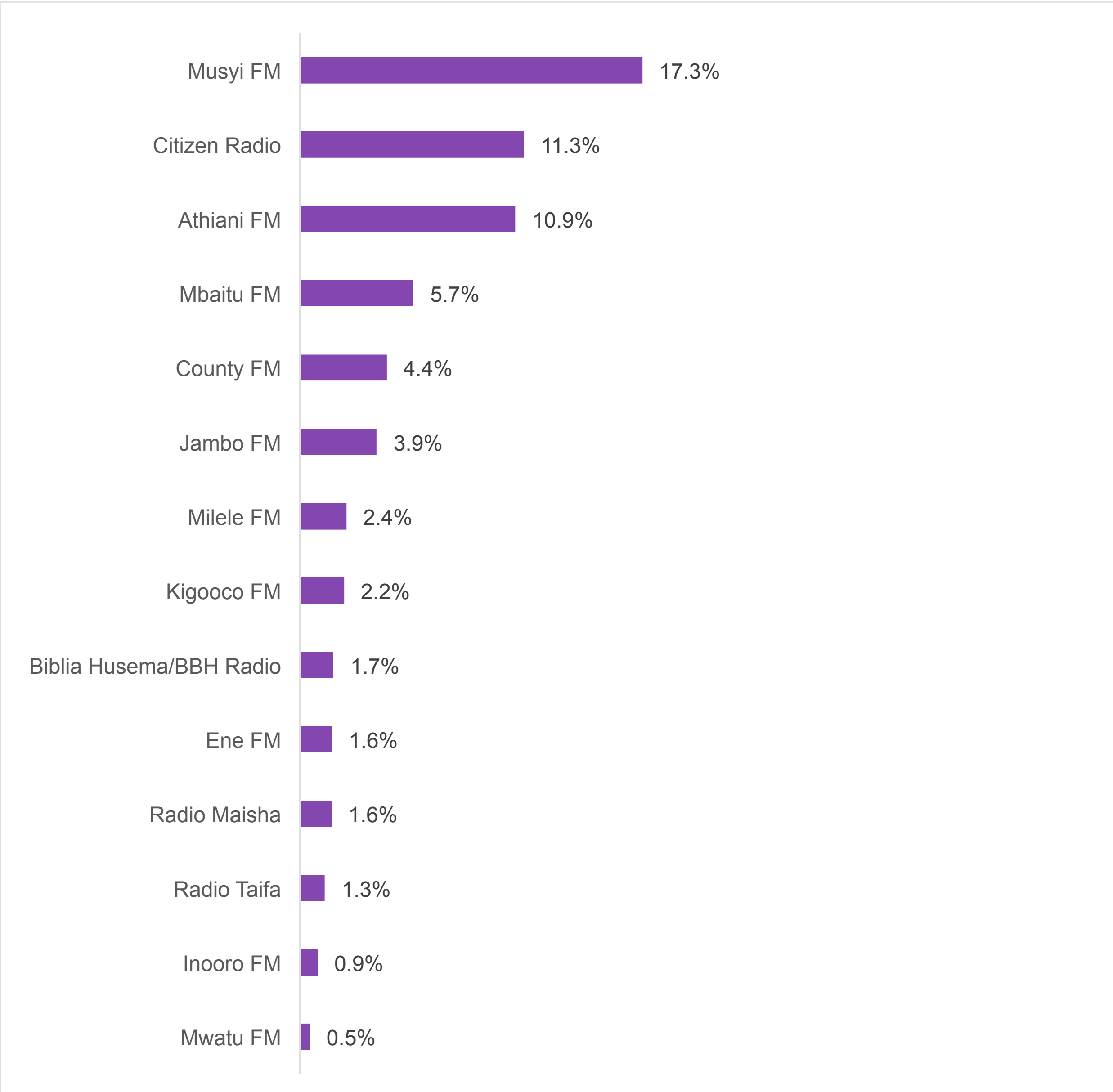


Chart 30

Radio Listenership by topographies (Regions) – **Upper Eastern**- (Meru, Isiolo and Tharaka)

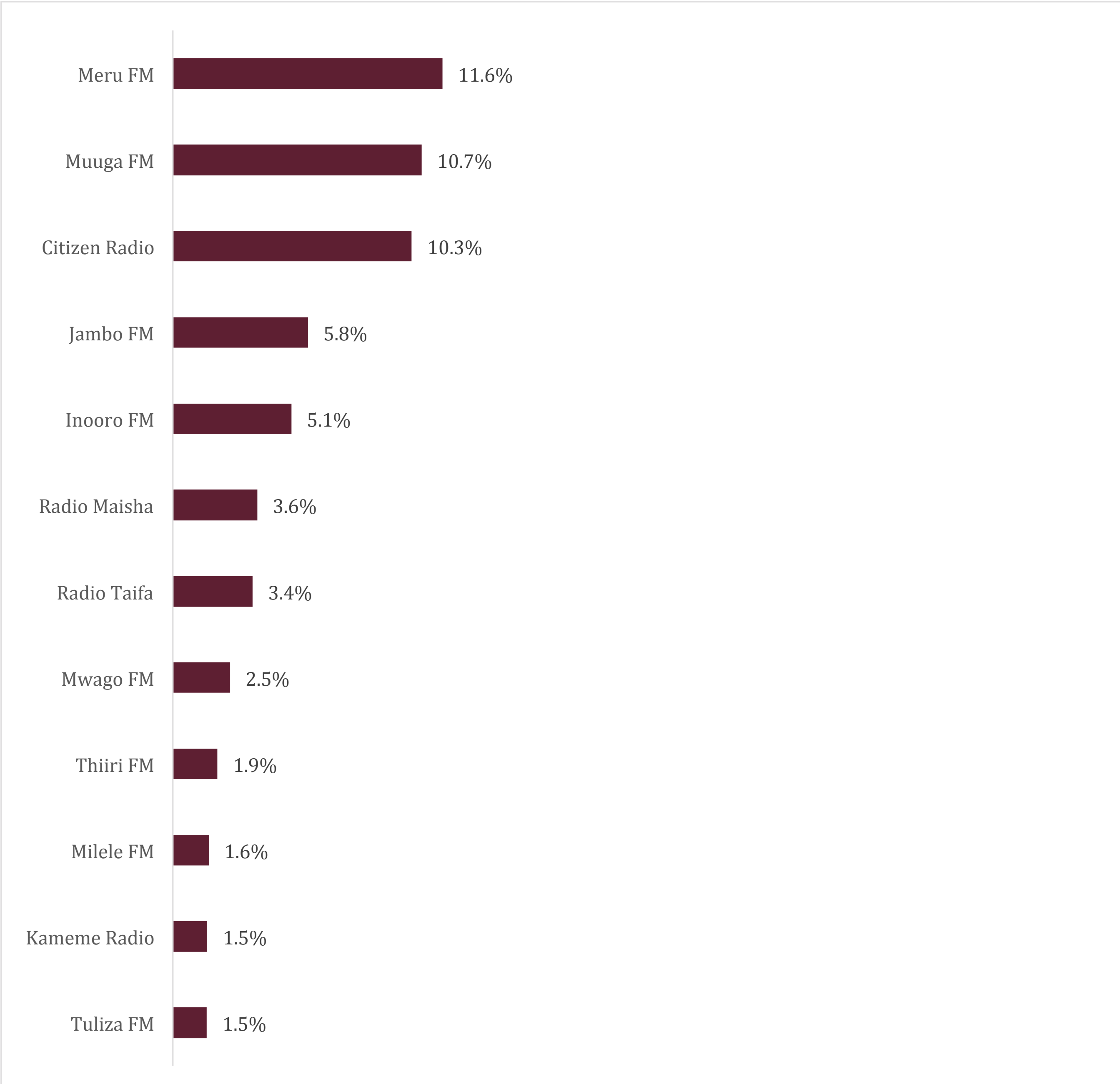


Chart 31

Radio stations Listenership by Time blocks

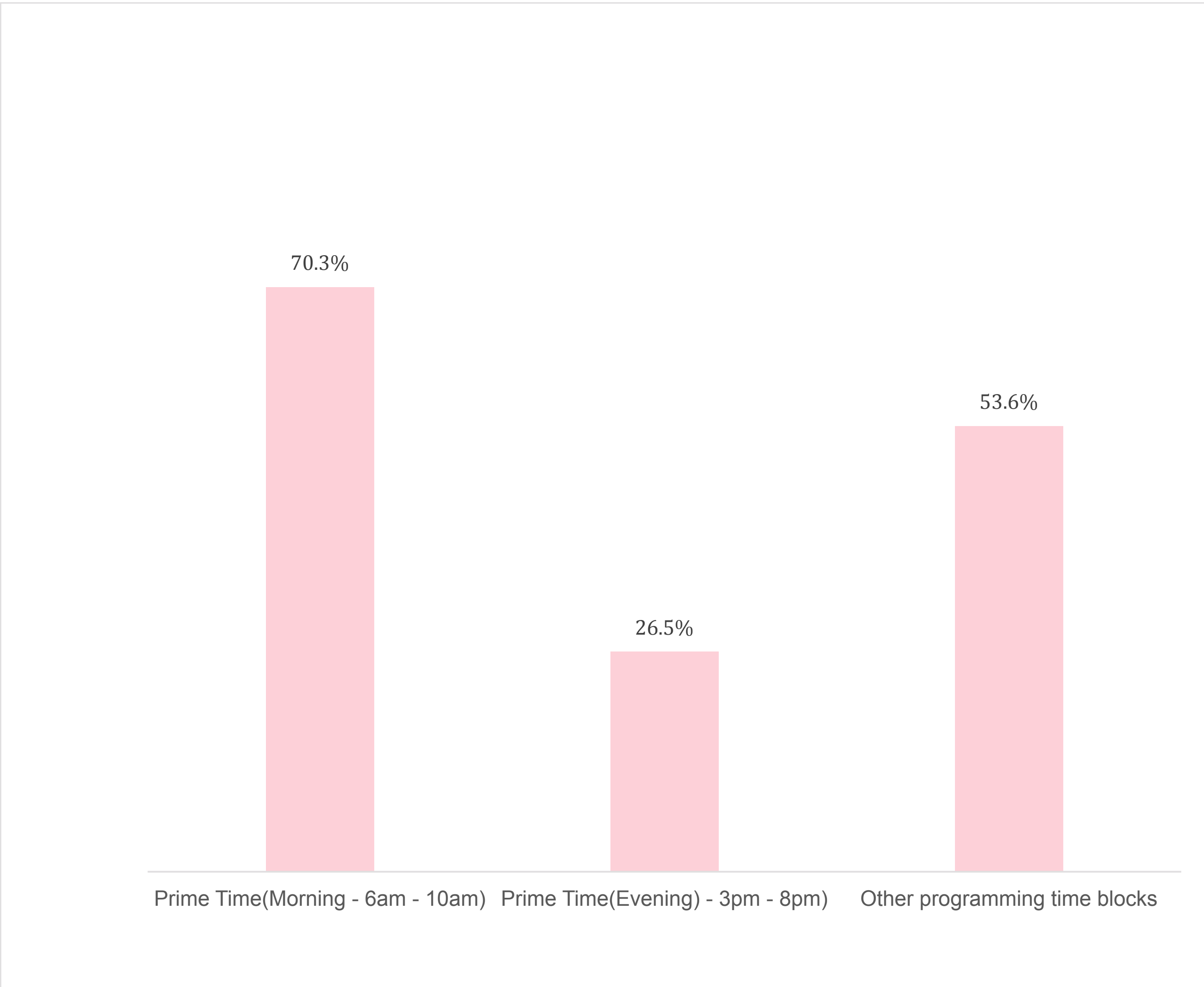


Chart 32: As opposed to Television which is an evening media channel, radio prime time is mostly listened to during the morning hours and thus makes morning shows very competitive, other time segments listenership is higher, this is because you can listen to the radio while working or doing any other activities.

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N=34.3M:Average Daily Radio Listeners in July - September 2019

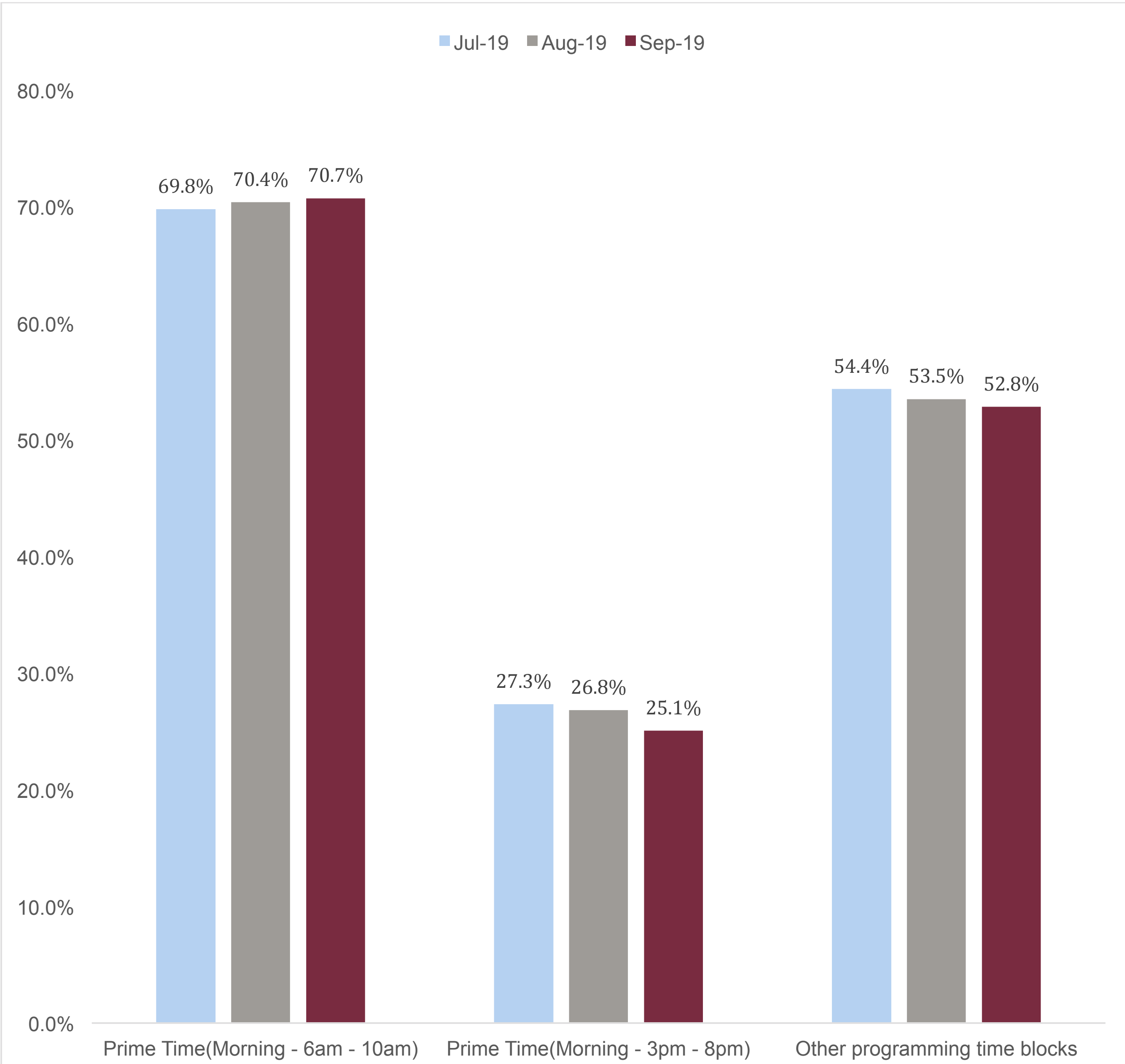


Chart 33: The morning prime time segment is consistent at 70% across the 3 months.

Demographics of prime-time vs other programming time radio listeners

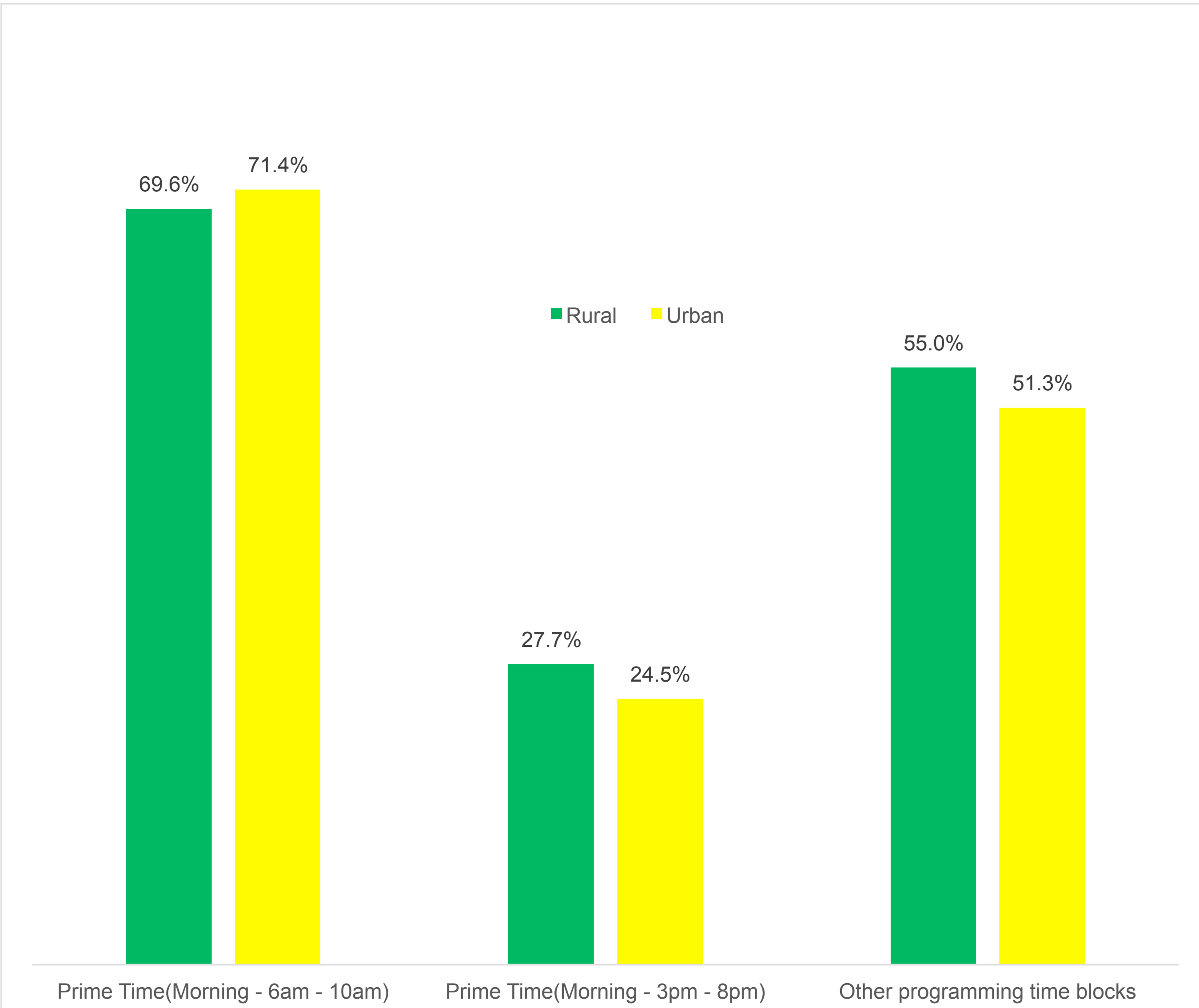


Chart 34: The morning prime time segment is the same in urban and rural, other programming time segments is higher in rural areas than in urban.

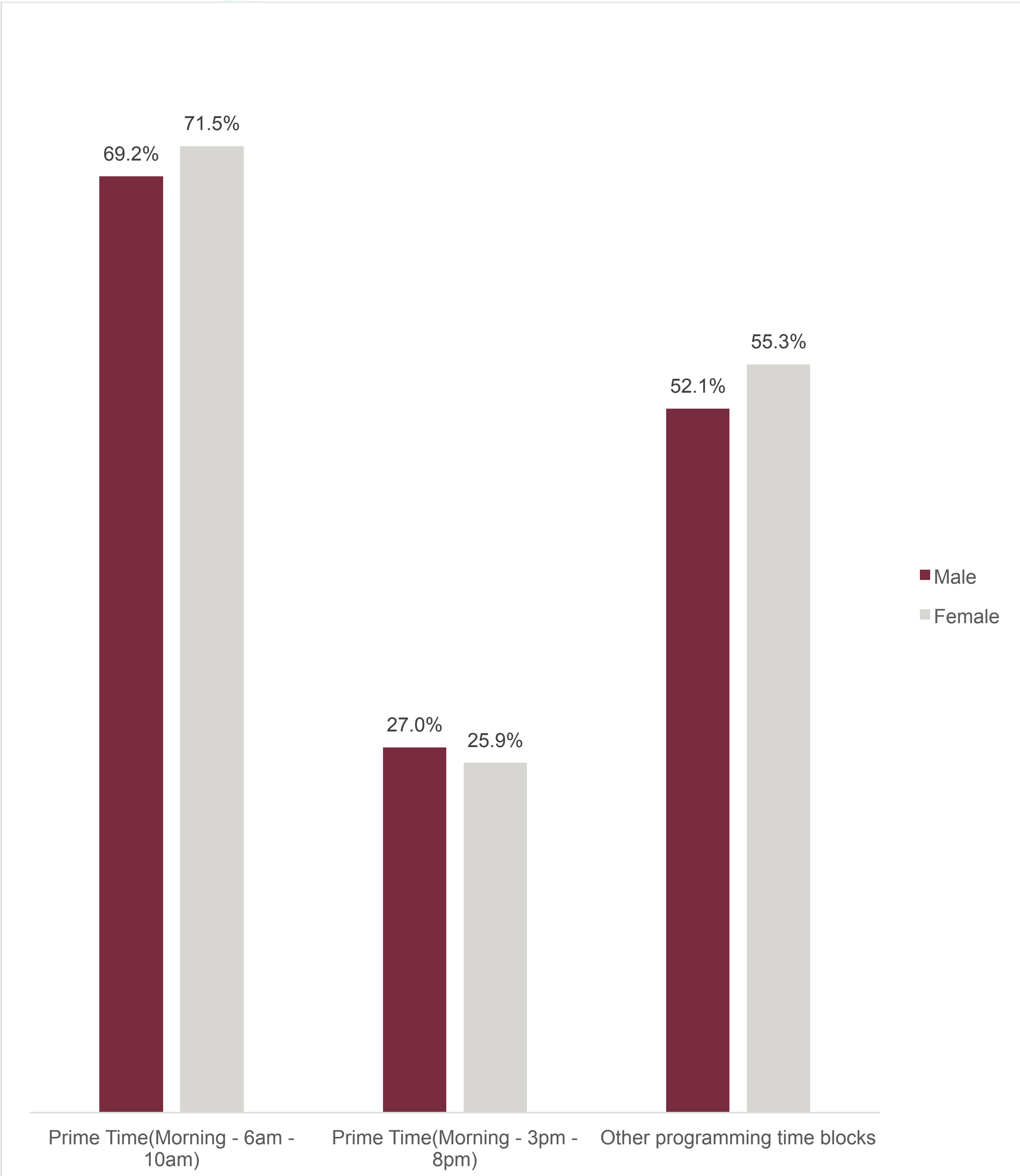
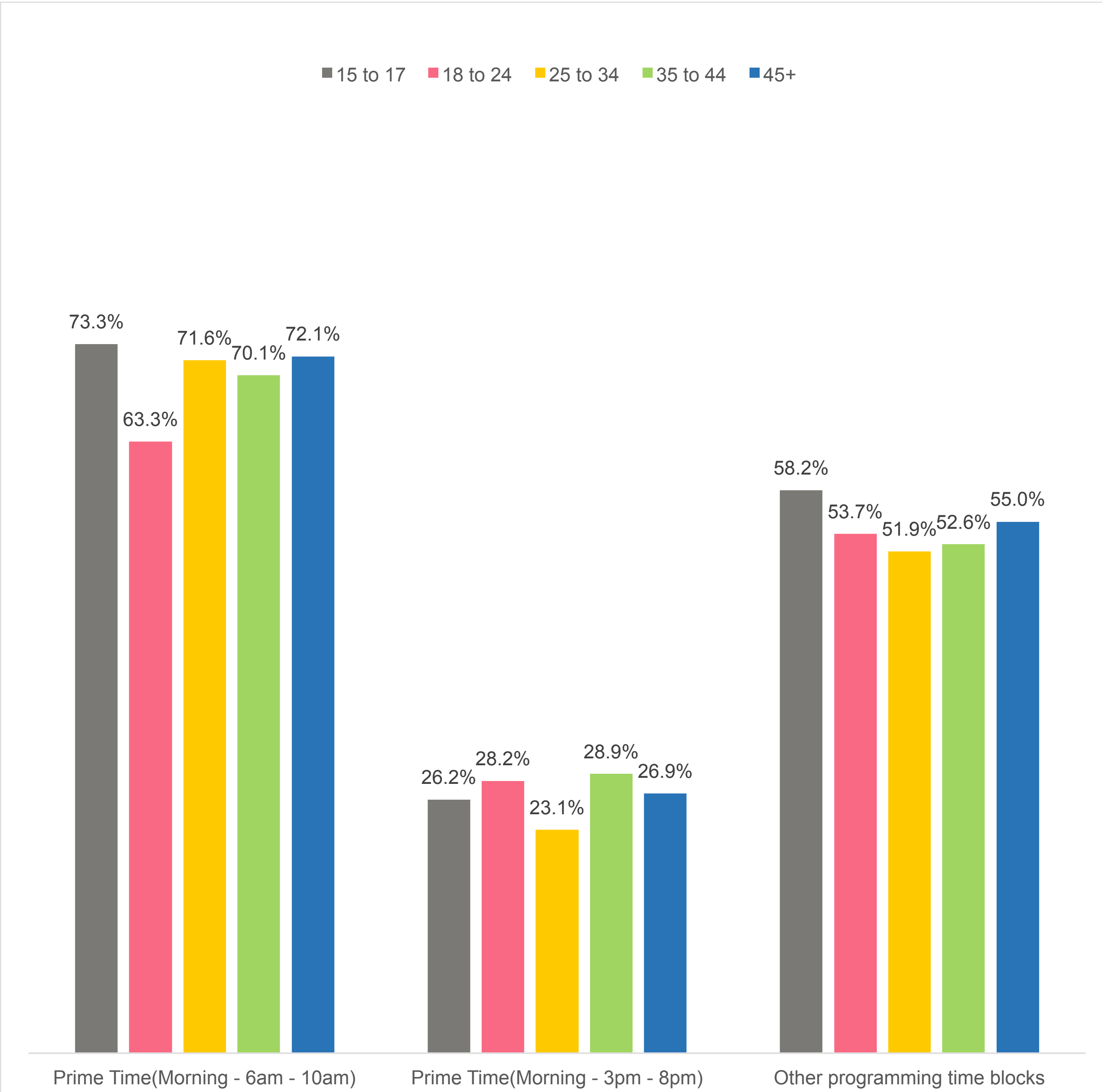
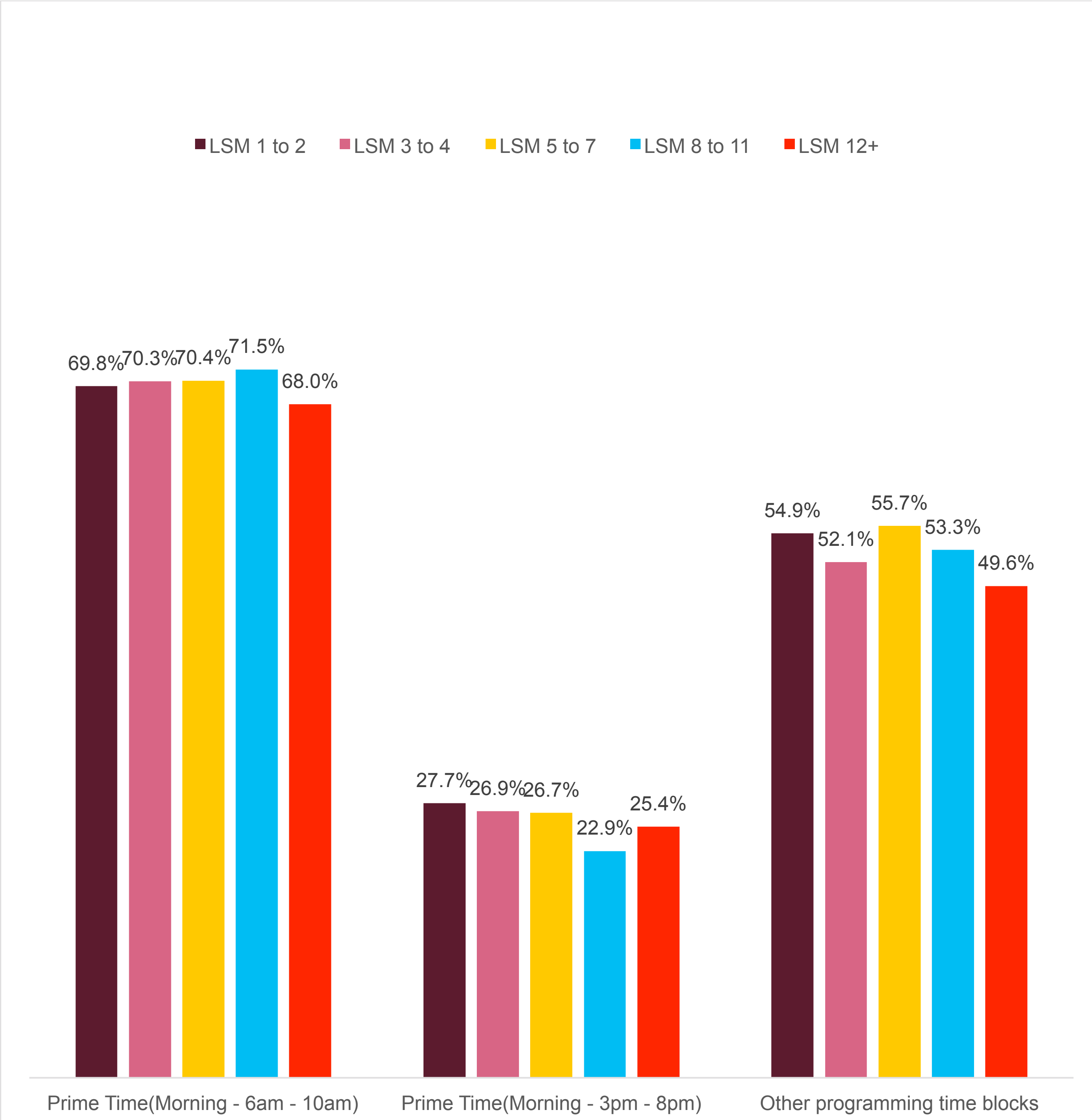


Chart 35: Female radio listeners are in the morning in the morning prime time and other programing time segments, males are in the evening prime time.



15 to 17
18 to 24
25 to 34
35 to 44
45+
73.3%
63.3%
71.6%
70.1%
72.1%
26.2%
28.2%
23.1%
28.9%
26.9%
58.2%
53.7%
51.9%
52.6%
55.0%
Prime Time(Morning - 6am - 10am)
Prime Time(Morning - 3pm - 8pm)
Other programming time blocks

Chart 36



LSM 1 to 2
LSM 3 to 4
LSM 5 to 7
LSM 8 to 11
LSM 12+
69.8%
70.3%
70.4%
71.5%
68.0%
27.7%
26.9%
26.7%
22.9%
25.4%
54.9%
52.1%
55.7%
53.3%
49.6%
Prime Time(Morning - 6am - 10am)
Prime Time(Morning - 3pm - 8pm)
Other programming time blocks

Chart 37

Stations listenership by prime time vs other programming time .

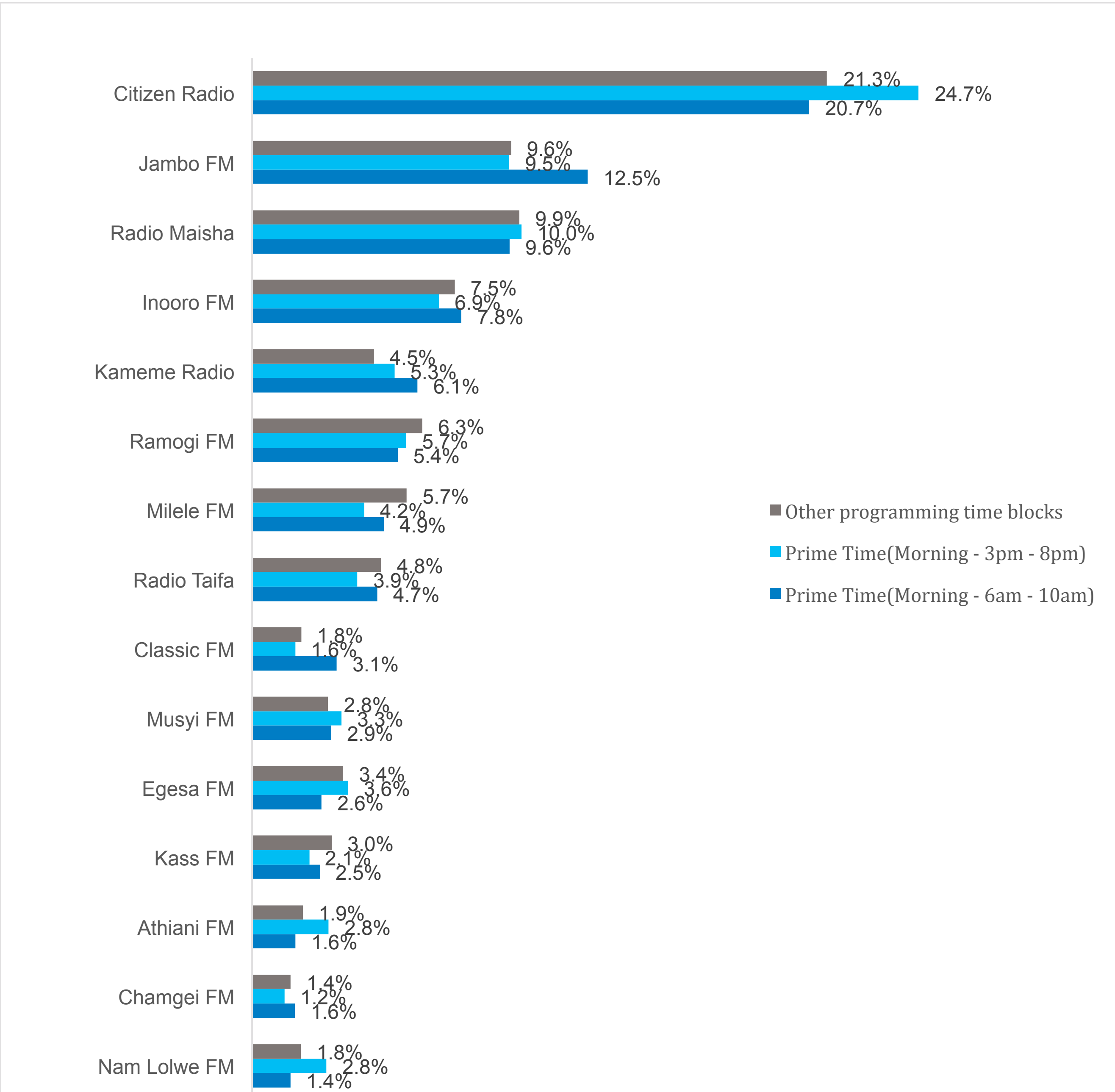


Chart 38

Morning Prime Time stations rating. (600hrs – 1000hrs)

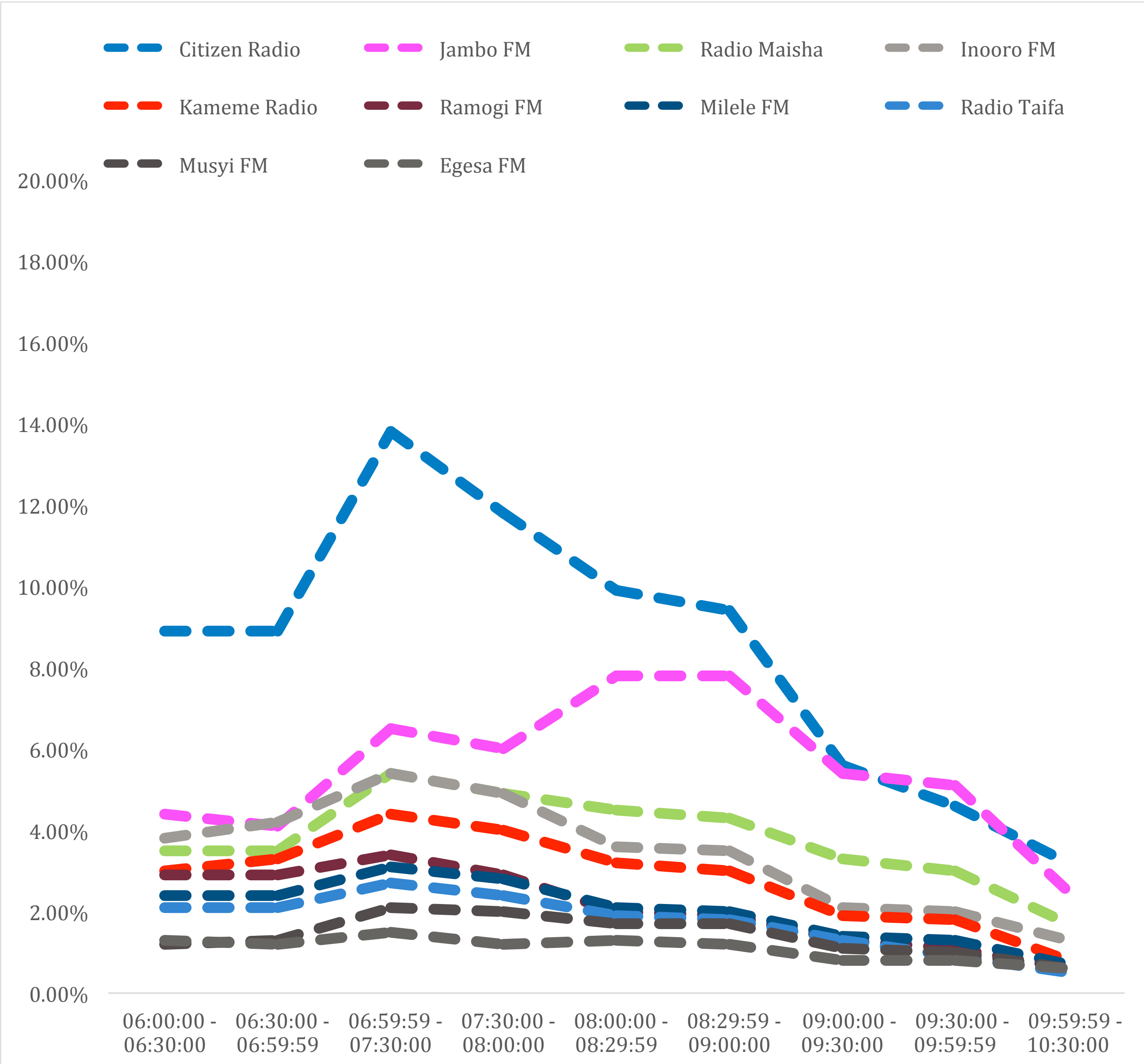


Chart 39: Citizen Radio is the most listened to during the morning shows, followed closely by Radio Jambo, which picks from 800am.

Evening Prime Time stations rating. (1500hrs – 22200hrs)

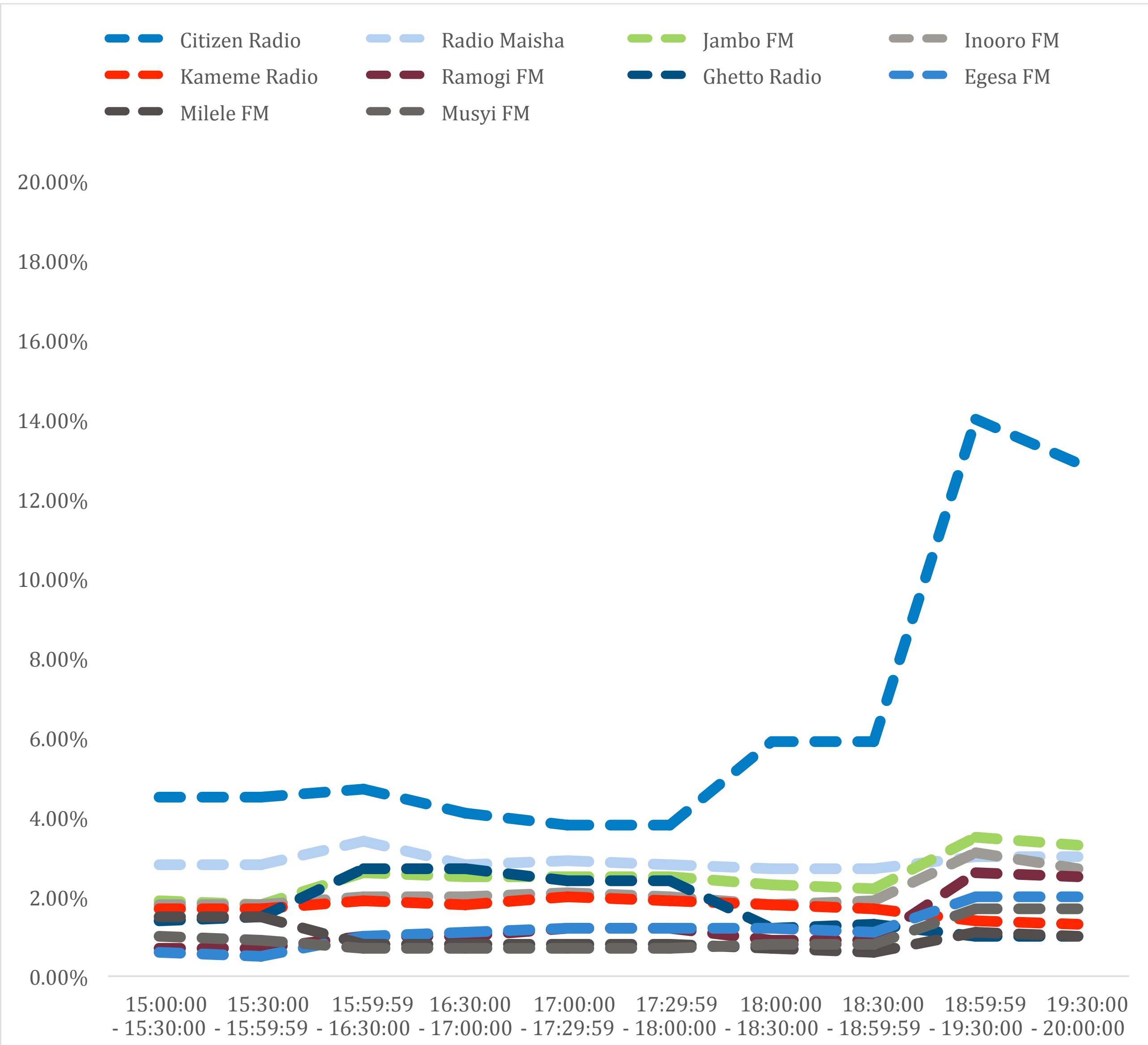


Chart 40: Citizen Radio is still rated high in the evening shows, Radio Maisha overtakes Radio Jambo .

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Other programming time segments - stations rating . None Prime(Midnight – 5am,1100am – 1400hrs and 2000hrs – Midnight)

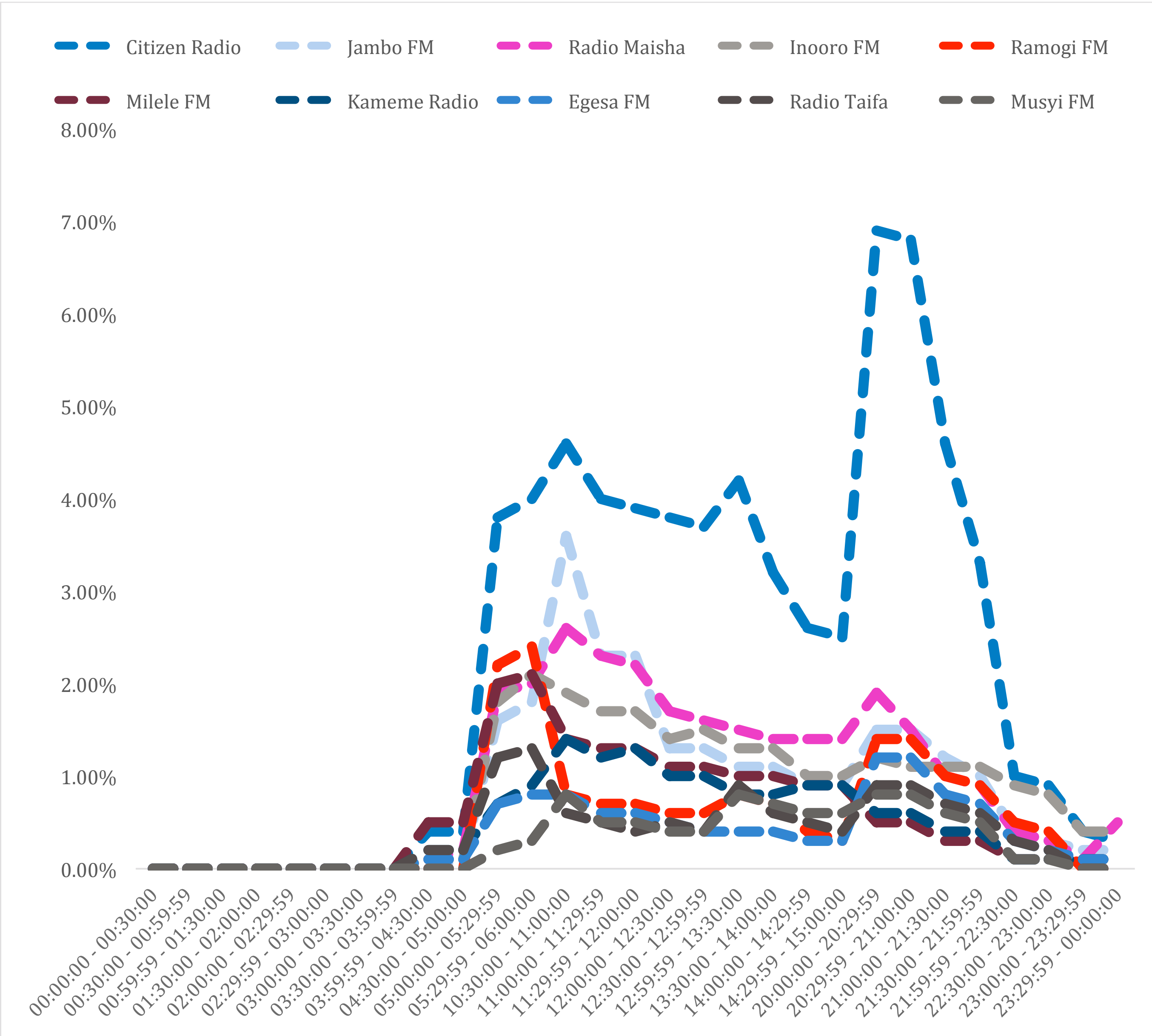

Chart 41: Citizen Radio leads in other times segments, Radio Jambo and Maisha alternates at certain times of the day.

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Share of listenership

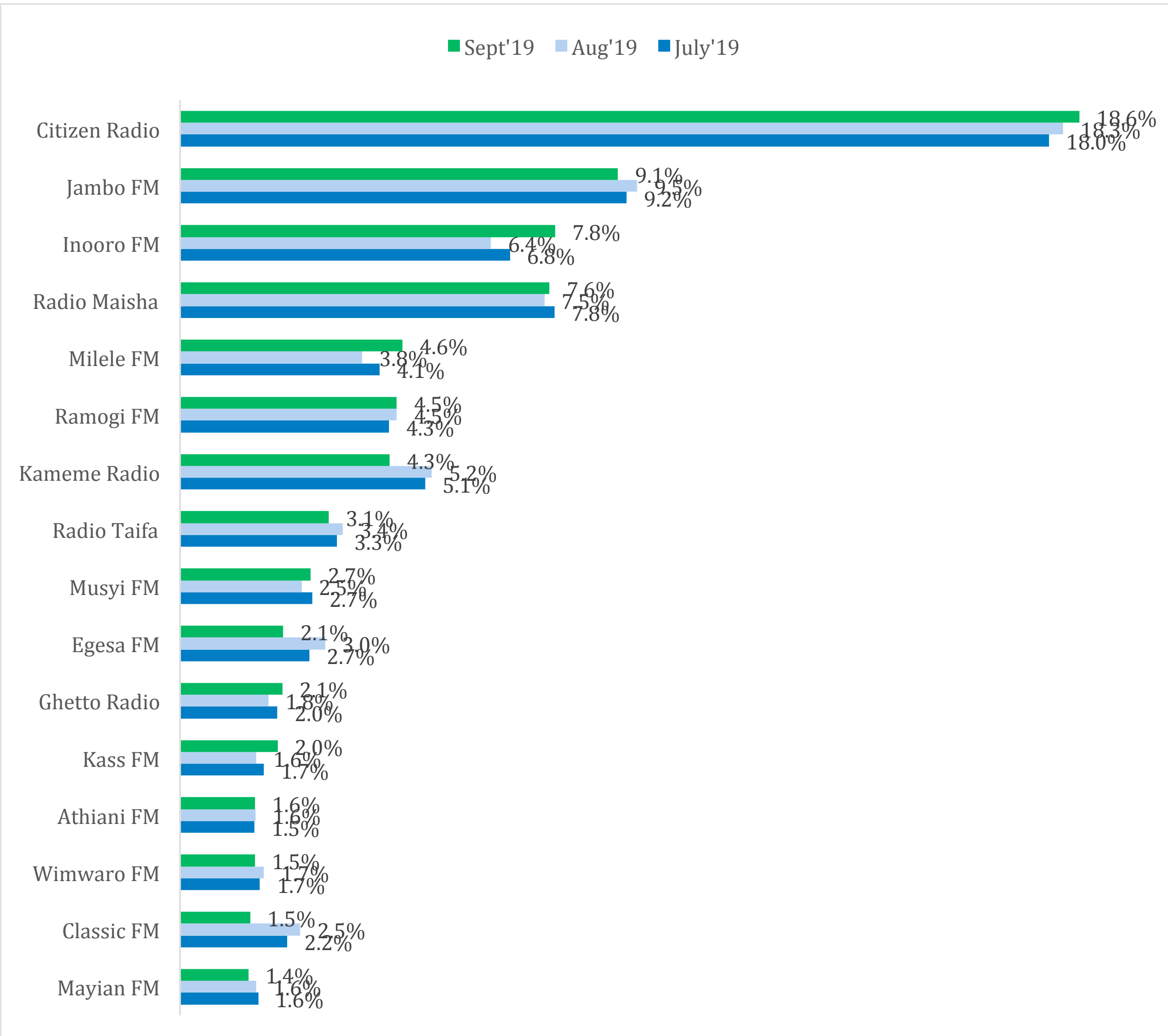


Chart 42

Listenership of Commercial Vs Community Stations

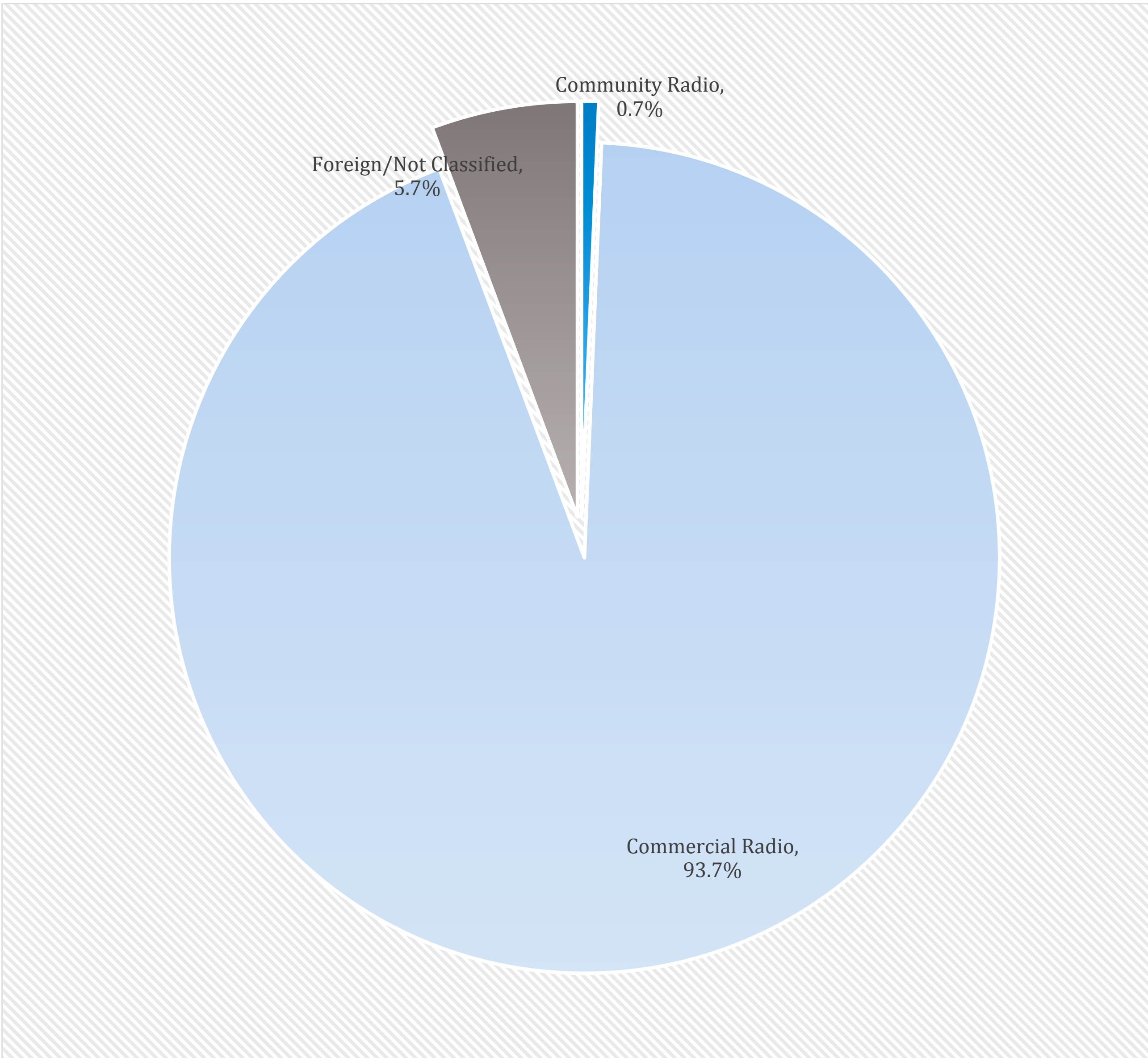


Chart 43: Radio stations ownership is Commercial at 93.7; Community stations are yet to penetrate the market trailing at 0.7%.

Listenership of Community Stations

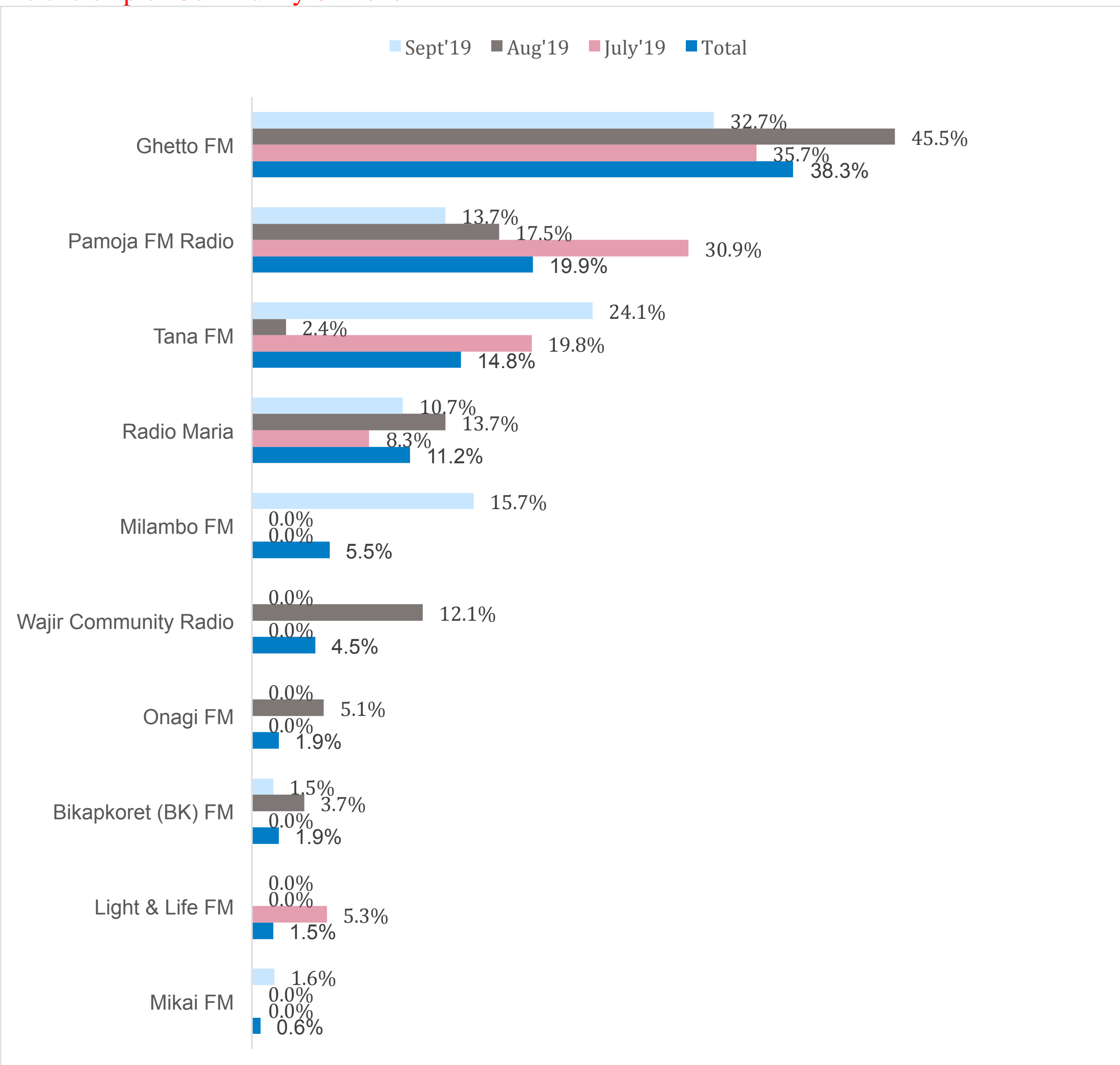


Chart 44 : Ghetto FM tops in the ranking of Community Radio Stations.

Listenership of Commercial Stations

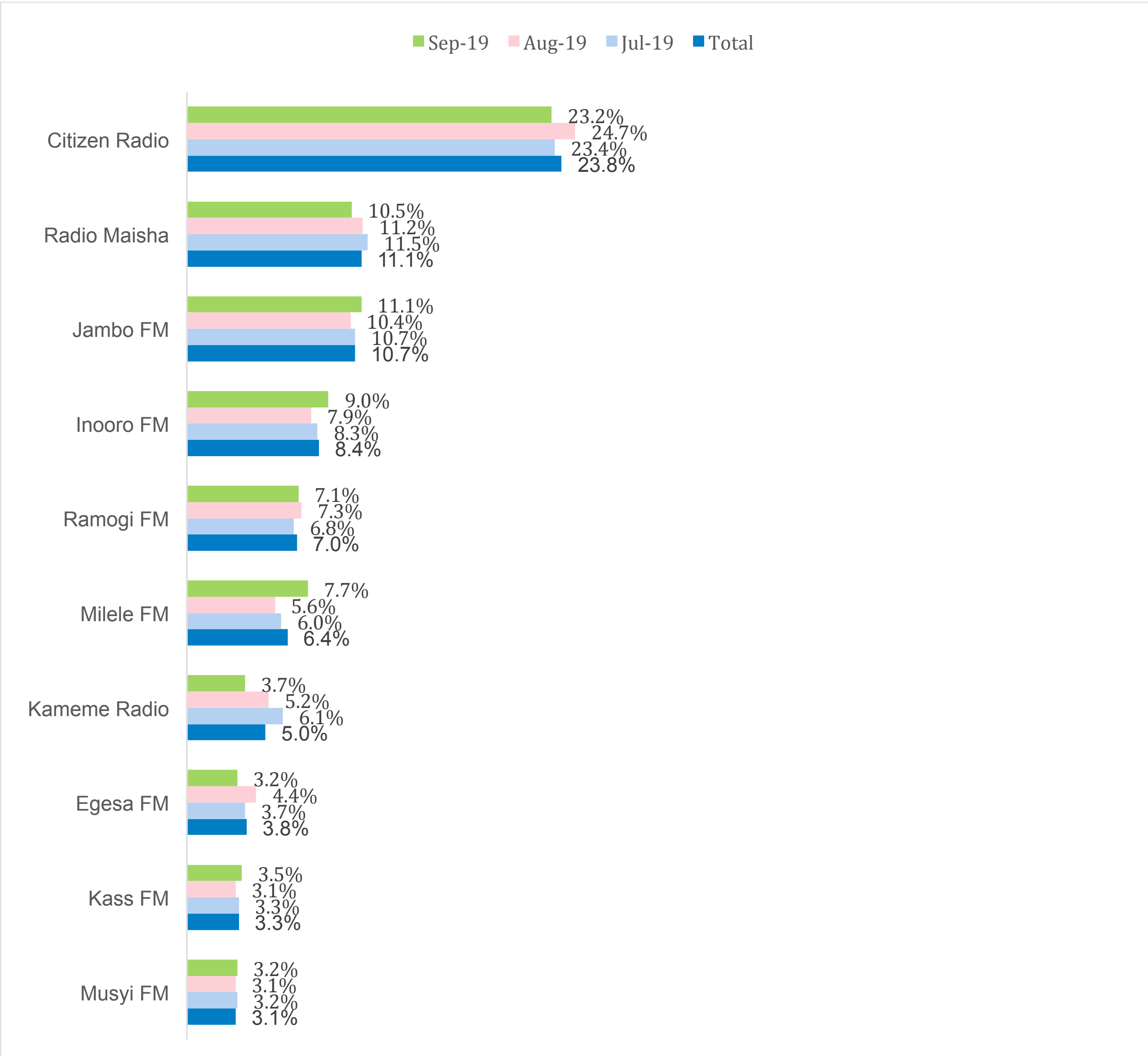


Chart 45

OVERALL ALLOCATION BY INDUSTRIES

The overall advertising spectrum has been posting multidirectional shifts in terms of ad spends, with a specific incline in the previous quarter. The ad expenditures then declined by 9% in Q1 2019/20. This shift is largely attributable to the tussles in the Betting and Gambling Industry, which has posted consistent declines through the quarter. High advertising of Shabiki brand campaigns in the month of July influenced the overall advertising space of the quarter, which saw the Betting and Gambling industry remaining the top industry of the quarter (there was, however, unidirectional declines in the industry's ad spends allocations month-on-month). Safaricom's Skiza Tunes and RMS' Viusasa campaigns were also highly advertised, influencing the dominance of Communication and Media industries.

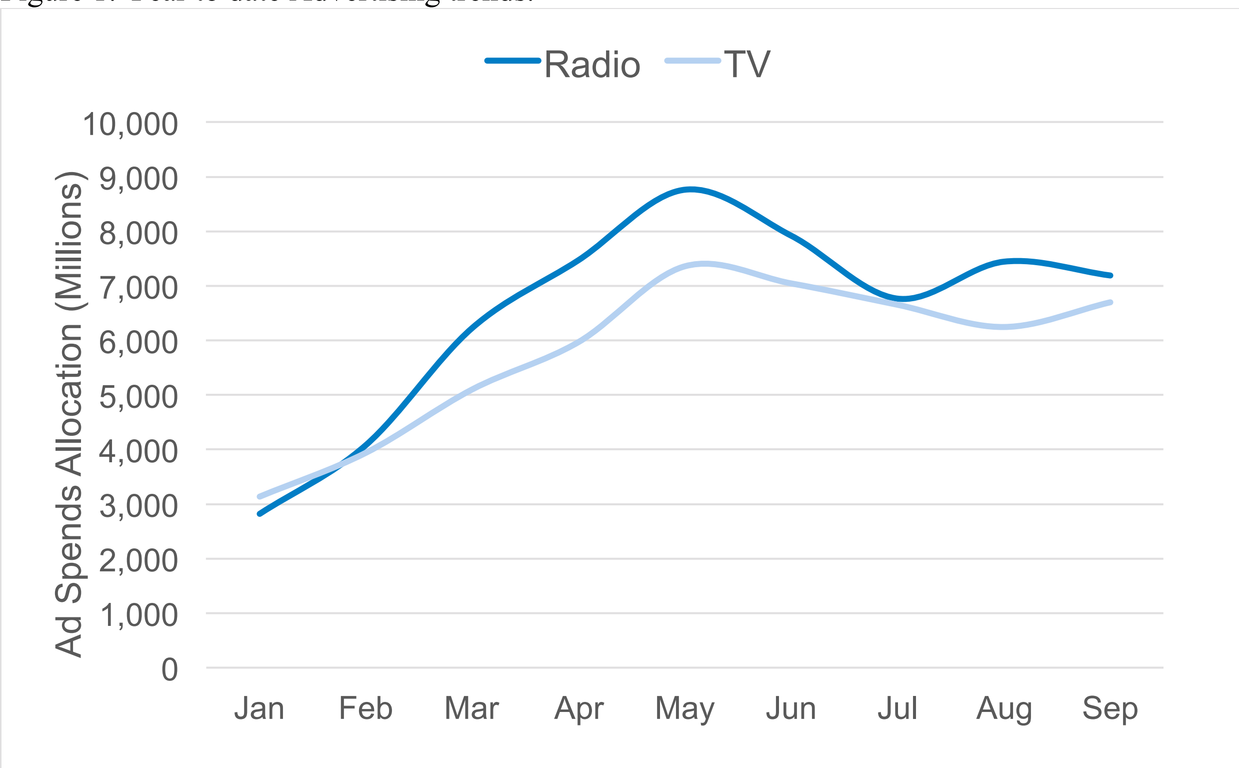
Table 1: Overall Industry Advertising Spectrum

INDUSTRY	July	August	September	Total
BETTING AND GAMBLING	3,003,745,590	1,991,465,448	1,664,114,630	6,659,325,668
COMMUNICATION	1,849,980,970	2,427,159,220	2,346,247,710	6,623,387,900
MEDIA	2,122,260,172	2,074,414,193	2,081,889,280	6,278,563,645
FINANCE	1,551,451,908	1,509,661,909	2,479,592,835	5,540,706,652
PERSONAL CARE	773,276,630	695,000,010	673,365,300	2,141,641,940
STATE BODIES	582,366,031	1,130,737,687	282,073,621	1,995,177,339
FOODS	642,790,830	558,672,720	673,006,190	1,874,469,740
EDUCATION	288,357,330	781,594,580	737,829,740	1,807,781,650
HOUSEHOLD	445,252,470	497,619,090	466,963,310	1,409,834,870
BEVERAGES	368,206,070	346,649,560	397,743,820	1,112,599,450
PHARMACEUTICALS	235,420,050	354,777,320	437,528,330	1,027,725,700
AGRICULTURE	433,627,470	277,628,933	304,201,550	1,015,457,953
SOCIETY	411,910,950	164,544,480	161,017,650	737,473,080
BUILDING AND CONSTRUCTION	114,900,460	175,556,160	197,877,800	488,334,420
EVENTS	56,803,360	220,833,770	209,828,405	487,465,535
OTHERS	769,801,745	665,078,382	906,588,672	2,341,468,799
Total	13,650,152,036	13,871,393,462	14,019,868,843	41,541,414,341

Overall Advertising Trends (Jan – Sep)

Fig 1 below shows the seismic movements of the advertising trends, which rose consistently through to mid-year and then declined before rising and declining again is a sigmoidal pattern. The trends are greatly influenced by top industries in the advertising space (See Above). Before the sports betting impasse, the Betting and Gambling controlled about 30% of the overall advertising spends in the Kenyan media space.

Figure 1: Year to date Advertising trends.



ALLOCATIONS BY MEDIUM

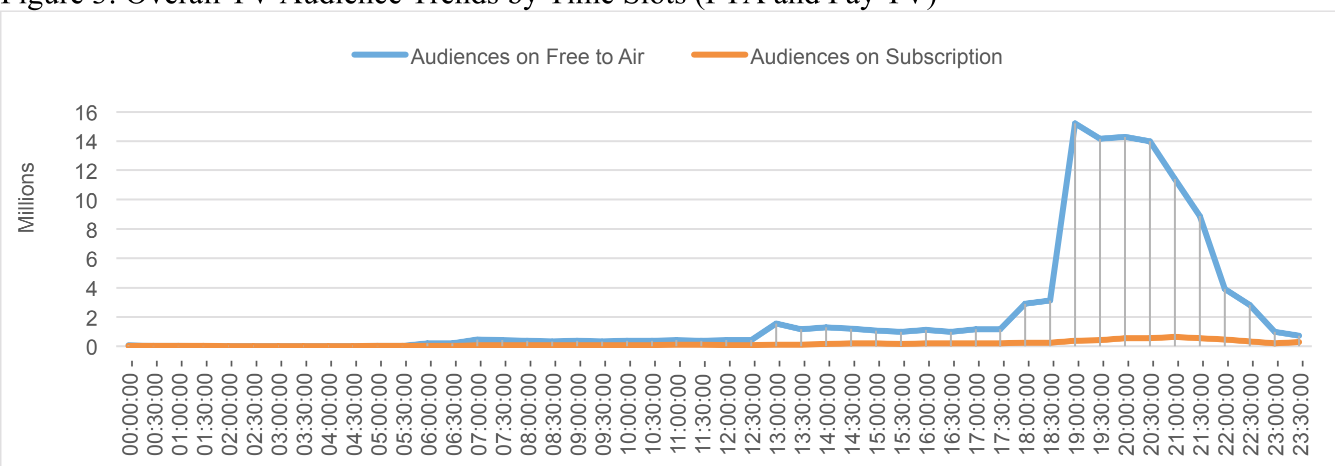
Generally, electronic media are preferred for advertising, with an especial inclination towards Radio. The radio platform has higher audience rating point, hence reaches a higher audience share as compared to other media. Radio also offers leverage in its higher geodemographic presence, as well as wide array of advertising descriptive edges (ad types). Generally, the world is experiencing paradigm shift to enhance inclusivity across domains, hence regional stations are highly utilized to advance campaigns to enhance sensitization as well as brand mobility across regional topographies, in order to par with their urban counterparts who have higher exposure chances.

Figure 2: Overall Ad allocations by medium

TELEVISION

FTA and Pay TV categories observe similar audience patterns whereby Audience numbers grow as the day progresses with the 1900hrs to 2200 hrs window being prime time on FTA channels, while late-night sporting activities influenced the self-relative spike in viewership on Pay TV platforms.

Figure 3: Overall TV Audience Trends by Time Slots (FTA and Pay TV)

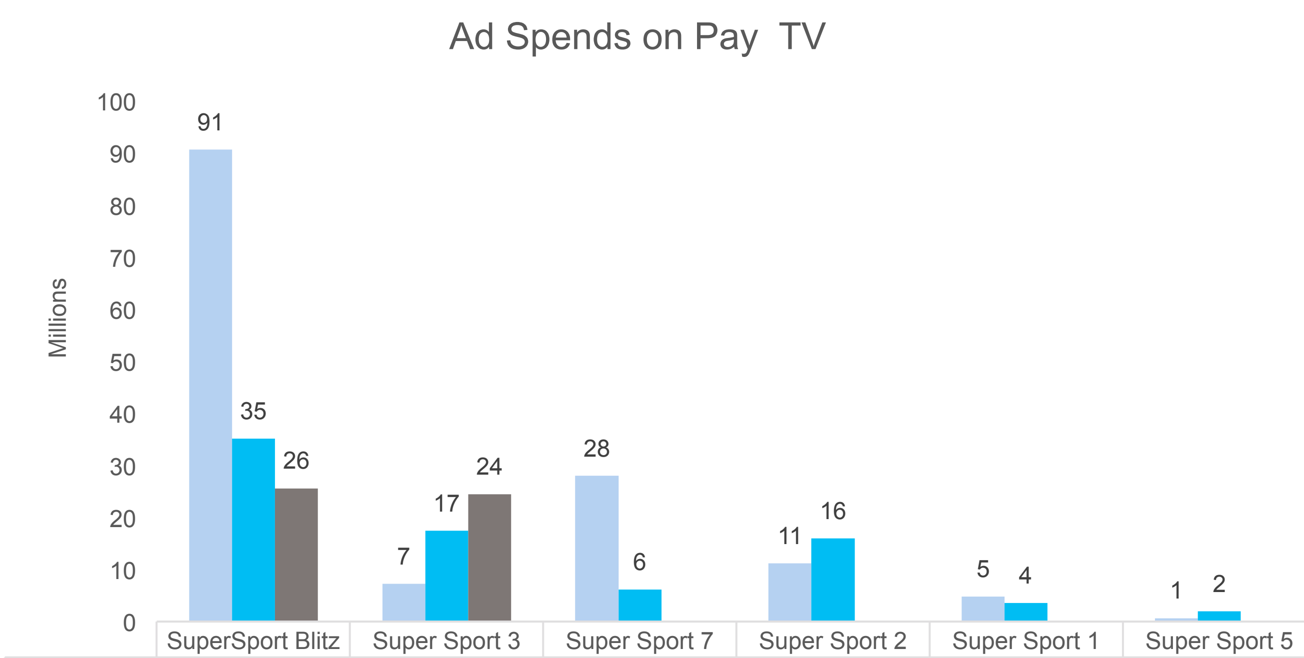


AD SPENDS ON PAY TV

On the Pay TV platforms SuperSport outlets dominate the coverage highly influenced by the high audience numbers during live games especially the English premier league.

MultiChoice Kenya Ltd's brand campaigns dominated the category ad scene during the quarter, as BetWay Betting Company and Airtel also consistently utilized the channels through the three months under review

Figure 4: Pay TV Ad Spends Share



	SuperSport Blitz	Super Sport 3	Super Sport 7	Super Sport 2	Super Sport 1	Super Sport 5
July	90,635,710	7,209,220	27,985,440	11,195,340	4,817,150	648,870
August	35,174,560	17,414,730	6,130,880	15,993,220	3,576,970	1,926,850
September	25,618,310	24,474,420				

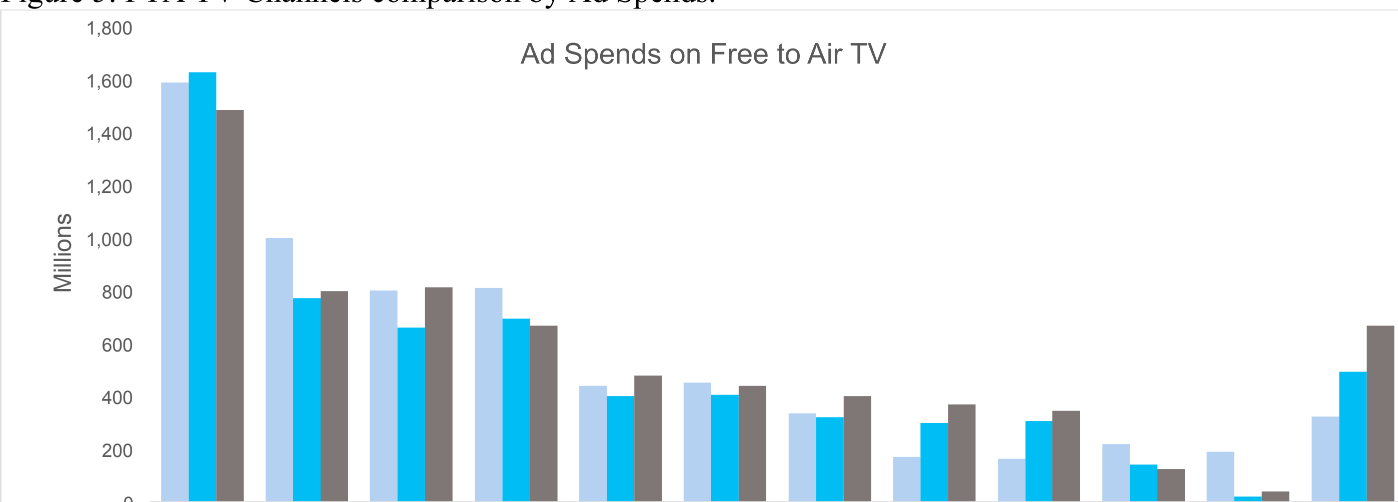
AD SPENDS ON FTA CHANNELS

Citizen TV emerged as the top TV station across both PayTV and FTA channels during the quarter with "Safaricom Skiza Tunes" and "Viusasa" campaigns dominating in Ad volumes and consequently Ad allocations.

With the paradigm shift that inclines the role of consumerism in brand visibility for businesses, the emergence of vernacular stations is explainable from the consumer-centric perspective; hence larger portion of the targeted niche is reached. Ideally, regional populace has a higher Radio consumption proportion as compared to the more affluent urban populace.

July saw KBC advance a lot of campaigns highly influenced by the exclusive rights to air the AFCON games that influenced its becoming the second most watched station during the month at 5.7% of TV viewership.

Figure 5: FTA TV Channels comparison by Ad Spends.

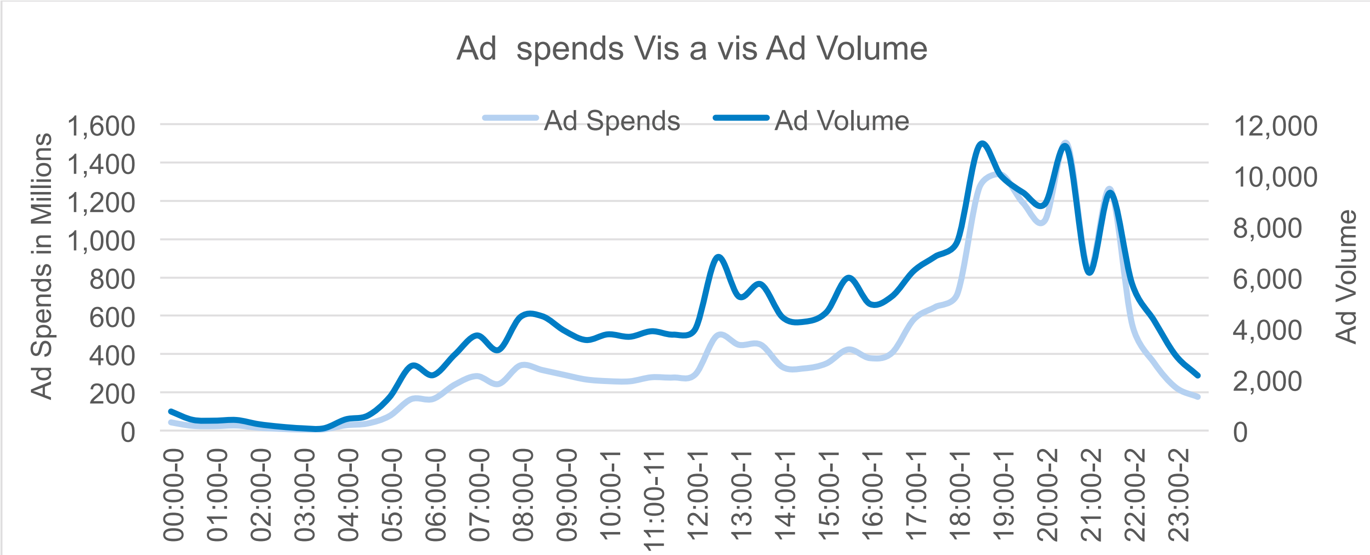


	Citizen TV	KTN	Inooro TV	NTV	Kameme TV	K24	KTN News	Kass TV	Switch TV	Gikuyu TV	KBC Channel 1	Others
July	1,589,873,690	1,000,181,920	801,932,300	812,177,050	441,875,990	453,869,530	336,374,970	172,284,070	164,411,990	219,700,110	192,504,680	324,989,520
August	1,630,467,030	773,699,940	661,813,430	696,352,580	402,651,690	406,764,850	322,257,570	301,364,670	308,726,960	143,204,170	22,214,770	495,501,090
September	1,487,437,410	799,222,500	815,546,610	670,103,070	479,053,470	441,641,040	402,254,200	370,636,550	345,902,410	125,788,030	40,418,040	670,208,740

ADVERTISING ACTIVITIES ACROSS THE DAY

On Figure 6, it is identifiable that ad spends allocation has unidirectional correlation with audience behaviors, where the prime hours (1800 – 2200hrs) are the most potent as a lot of activities are witnessed at this hours highly influenced by the News bulletins and the nature of programming whereby most channels air Soap operas pre the 7 O'clock and the 9 O'clock bulletins.

Figure 6: Trends of Ad Spends in relation to Ad Volume

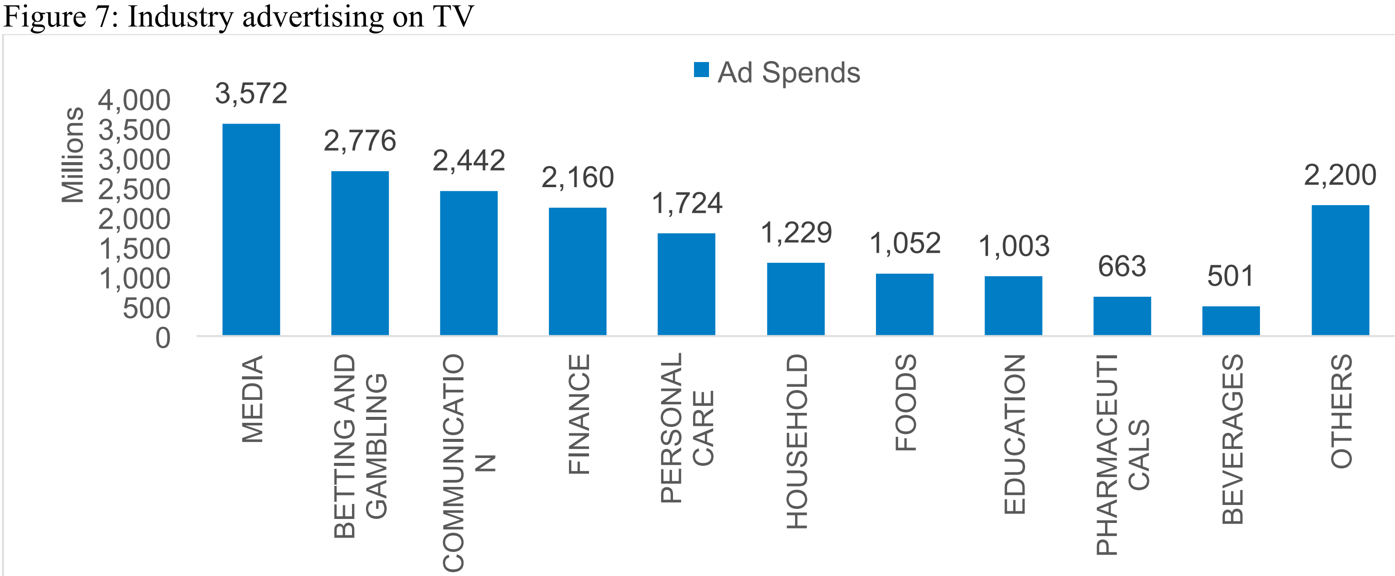


TOP INDUSTRIES ON TV

Broadcast media emerged as the most advanced sub industry on media Industry during the quarter fueled by the high advertising of the Channels whereas Viusasa was the most advanced brand on the industry attributed to the rigorous advertising on Royal media Platforms.

In spite of the crackdown on the sports betting firms which influenced a decline in Betting and Gambling industry advertising scene during the quarter, the high allocations are influenced by Lotto's and Tatau's (both Lottery and gambling firms) rigorous advertising.

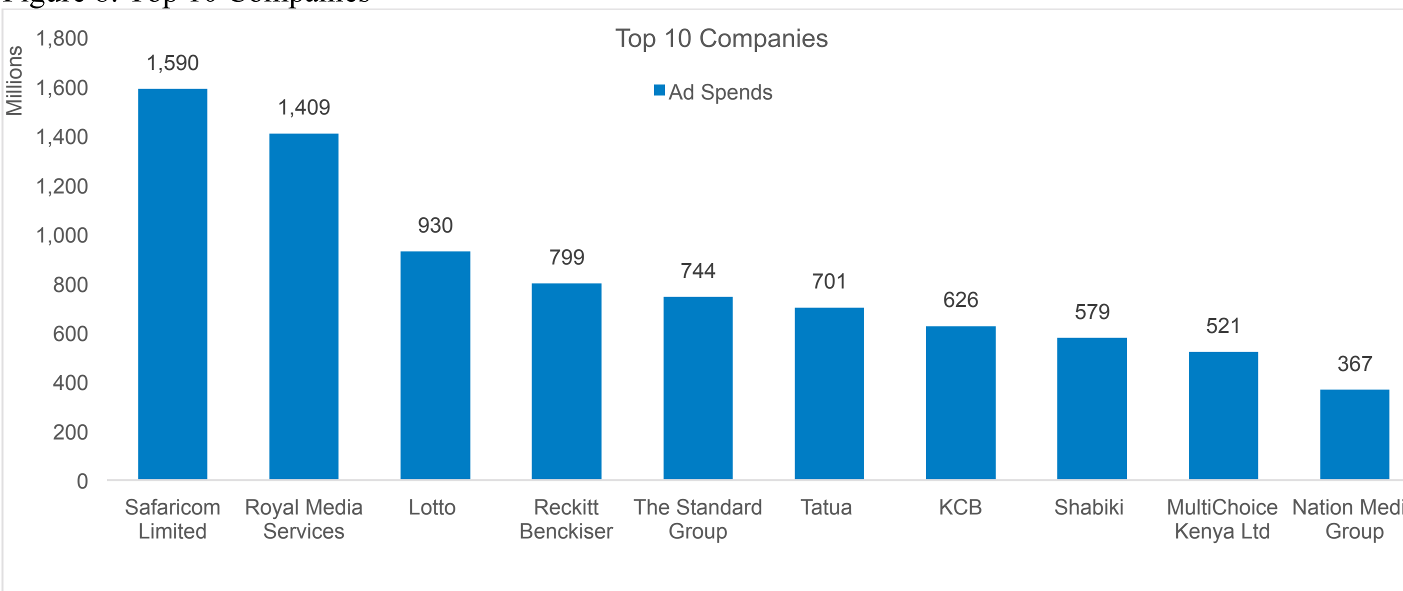
Figure 7: Industry advertising on TV



TOP COMPANIES ON TV

Safaricom Limited, the top advertiser on the platform during the quarter, advanced an array of campaigns with “Safaricom Skiza Tunes” being the most consistent campaign across the three months in terms of Ad allocations.

Figure 8: Top 10 Companies



AD TYPES ON TV

In a bid to create brand awareness different campaigns are advanced utilizing different Ad types or a fusion of different Ad types thus during the quarter Spot ad, which is basically a public notice describing or praising a product and at times where to find them, was highly utilized for brand visibility through the quarter.

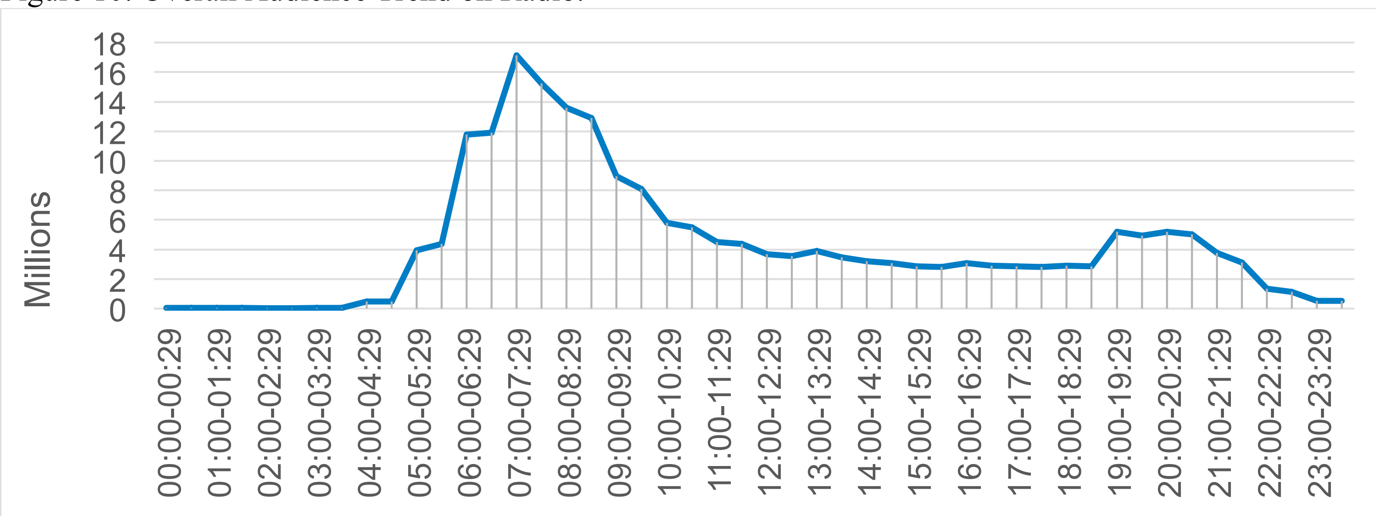
Figure 9: Ad Types on TV

Ad Type	July			August			September		
	Ad Volume	Airplay (Sec's)	Ad Spends	Ad Volume	Airplay (Sec's)	Ad Spends	Ad Volume	Airplay (Sec's)	Ad Spends
Spot Ad	39,845	1,589,019	4,415,788,030	42,369	1,693,110	4,441,107,570	44,306	1,796,790	4,547,155,440
Caption	8,239	111,447	383,218,780	7,602	106,216	378,796,260	8,934	134,014	444,824,160
Program	5,645	-145,982	0	5,474	-109,132	0	5,642	136,204	0
Promos	2,394	113,310	349,081,010	2,069	97,330	300,611,670	4,001	154,231	446,479,170
Board	3,318	98,766	341,614,690	2,061	55,359	198,259,340	2,698	75,217	250,373,480
Tips	2,135	62,213	211,982,500	1,640	51,270	168,665,860	2,102	61,751	164,244,990
Testimonial				2,727	174,508	492,729,510	2,696	185,945	502,002,550
Informercial	3,203	225,244	563,975,760						
Feature	952	42,143	137,721,570	840	36,634	107,924,830	1,179	54,083	170,426,200
Squeeze back	590	12,662	41,841,770	300	5,253	17,033,840	534	11,978	28,963,410
Clock	458	16,793	65,827,670	497	18,764	70,828,860	460	17,941	69,434,320
Flash Card	460	11,680	33,238,360	191	4,016	10,344,550	327	8,929	23,401,500
Pop up	534	5,723	17,774,120	213	5,082	15,357,570	111	2,631	7,765,730
Presenter Mention	226	14,152	38,829,140	231	15,033	33,490,880	219	13,761	32,905,630
Product Placement	306	6,645	19,368,010	4	569	2,206,800	44	798	1,012,050
Scroll Bar	191	5,796	17,306,850	4	43	150,000	20	645	2,013,820
Time Check	20	522	1,321,080	19	797	2,509,310	31	1,364	6,116,760
Icon	42	1,182	3,590,700				1	261	829,810
Interview	2	3	0	8	764	0	4	1,074	0
Activation	2	6,111	0	1	20	0	9	22,694	0
Live-Links	7	3,294	9,153,740	3	1,025	3,458,270			
Hour Starter				7	200	1,157,250	2	104	264,320
Frequency Check	1	96	29,700	1	19	51,790	7	112	88,840
Drop	4	26	95,350	2	34	102,550	1	14	57,490
Vox Pop	1	71	205,900	2	86	387,390			
Promo Mention	1	10	27,260	1	27	75,170			
Location Check	2	81	199,220						
Skit	1	116	476,340						
Animated Banner				1	18	41,760			
Total	**68,579**	**2,181,123**	**6,652,667,550**	**66,267**	**2,157,045**	**6,245,291,030**	**73,328**	**2,680,541**	**6,698,359,670**

ADVERTISING ON RADIO

Breakfast shows enjoy massive listenership highly influenced by the high number of points of listening as most people are on the move.

Figure 10: Overall Audience Trend on Radio.

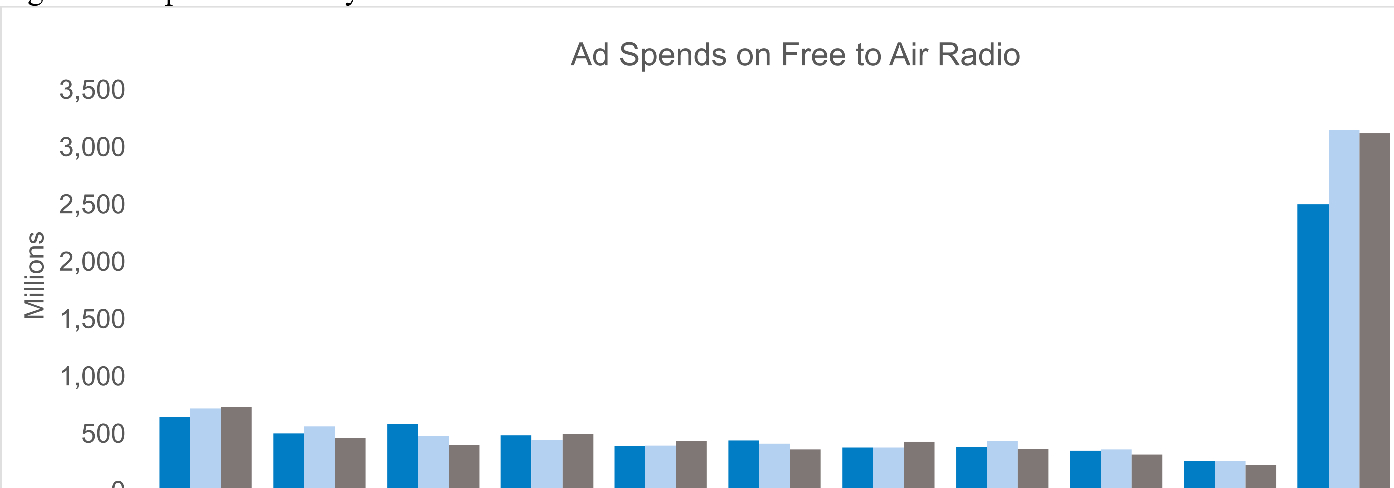


AD SPENDS ON RADIO PLATFORM

Radio remains the best platform for enhancing brand visibility among the virgin niches. The platform is highly penetrative and popular, unhindered by geodemographic factors, besides offering a wide array of advertising options, which sets it up as the most effective platform for advertising.

Vernacular stations were highly preferred for visibility during the quarter largely influenced by their specific target audience and penetration especially in the rural areas. The general perspective of inclusivity influences the emerging presence of Vernacular outlets in the media space.

Fig 11: Ad Spends Share by Stations

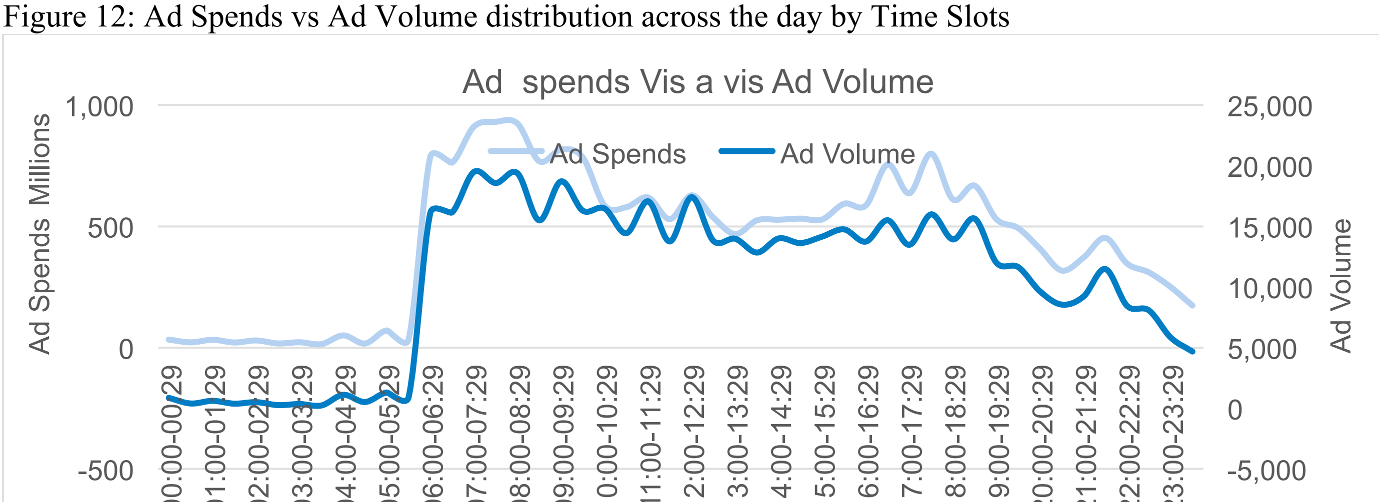


	Kass FM	Ramogi FM	Inooro FM	Citizen Radio	Kameme FM	Chamgei FM	Radio Maisha	Hot 96	Muuga FM	BAHARI FM	Others
July	631,827,600	486,169,500	572,971,710	470,509,620	374,981,740	424,828,340	366,854,690	368,635,560	335,926,950	246,664,880	2,486,012,440
August	707,571,670	548,670,560	466,035,470	431,190,580	383,564,160	397,966,930	362,713,310	419,271,570	348,846,160	246,440,610	3,130,668,640
September	713,762,030	450,393,370	384,081,170	483,149,080	419,696,040	348,519,780	413,625,520	352,053,130	301,342,130	216,066,050	3,107,194,030

ADVERTISING ACTIVITIES ACROSS THE DAY

Breakfast shows and Evening Drive shows remain to be the most potent time blocks on radio influenced by the high contact, as a large portion of the populace is the communizing working class.

Figure 12: Ad Spends vs Ad Volume distribution across the day by Time Slots

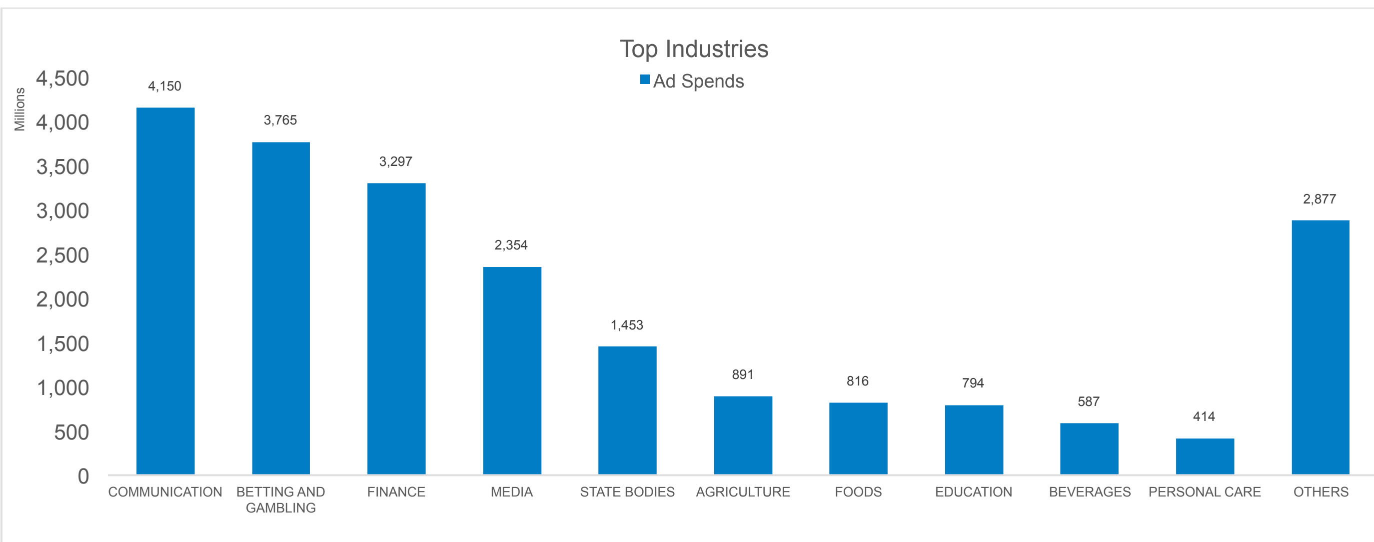


TOP INDUSTRIES ON RADIO

Similar to TV platform "Safaricom Skiza Tunes and Viusasa" were the most advanced campaigns on Radio, influencing the high allocations on Communication and Media Industries respectively during the month under review.

Rigorous sensitization of the public on "New Generation Bank Notes" catapulted Finance industry's Ad allocations during the months of August and September.

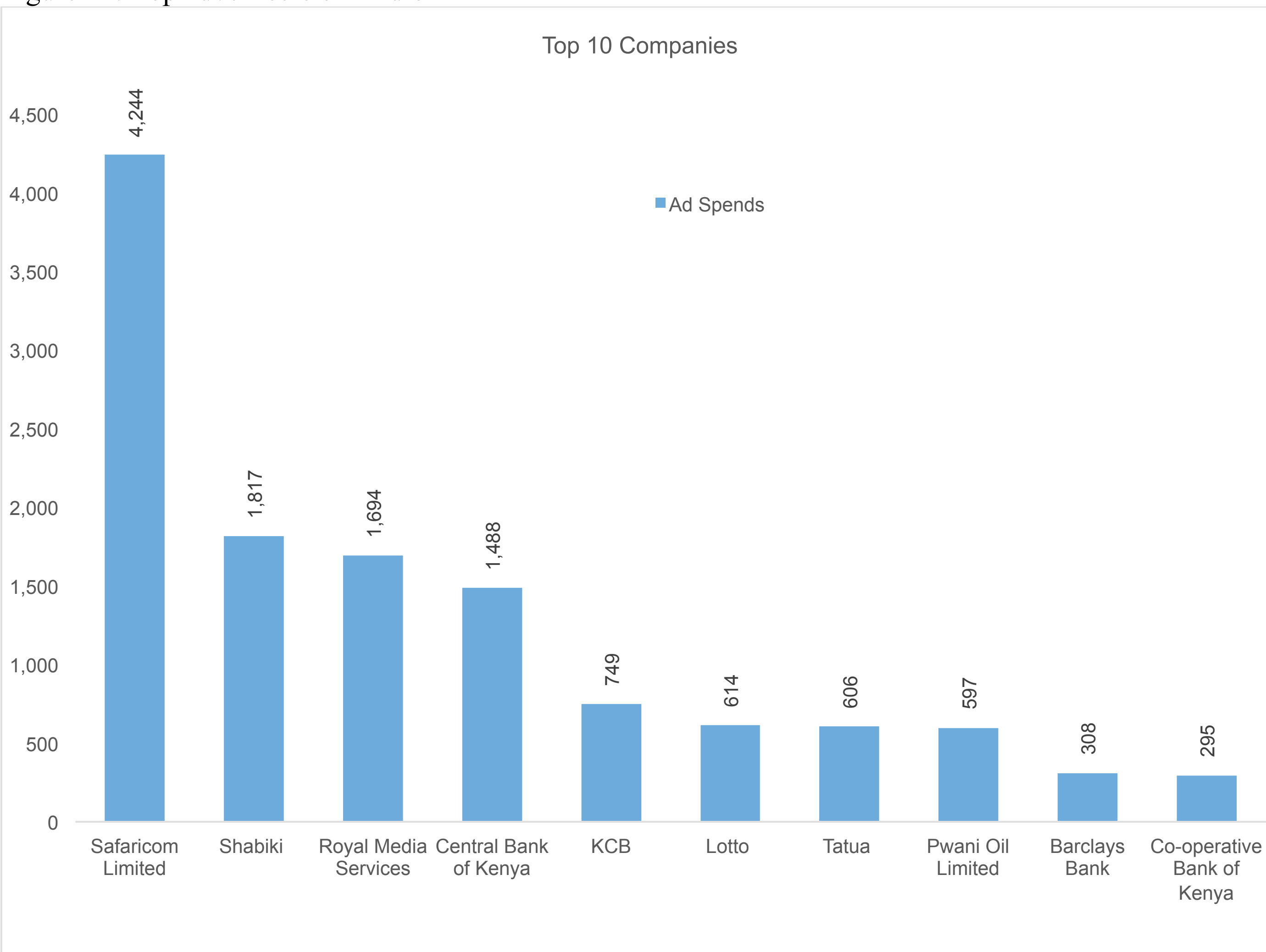
Figure 13: Industries ad spends allocation on Radio.



TOP COMPANIES ON RADIO

Shabiki emerges among the top companies during the quarter having been exclusively advanced on Royal media stations.

Figure 14: Top advertisers on Radio



AD TYPES ON RADIO

Radio boasts of Ad types such as presenter mentions that encourage engagement with the listeners hence the high utilization of such means to reach the consumers.

Figure 15: Radio Ad Types

Ad Type	July			August			September		
	Ad Volume	Airplay (Sec's)	Ad Spends	Ad Volume	Airplay (Sec's)	Ad Spends	Ad Volume	Airplay (Sec's)	Ad Spends
Spot Ad	81,280	3,602,685	3,484,441,590	96,897	4,587,055	4,148,777,210	98,908	4,470,452	4,004,676,830
Presenter Mention	28,447	1,905,988	1,876,272,200	27,745	2,160,885	2,087,798,410	27,349	2,055,909	1,991,800,240
Promos	13,137	483,688	442,325,350	18,468	640,854	614,815,950	18,743	693,846	693,609,680
Caption	19,776	291,722	309,857,280	12,262	191,267	210,694,680	10,649	186,222	200,573,060
Program	8,578	17,189,825,367	0	5,812	3,135,481,780	0	5,270	494,349	0
Vox Pop	6,635	380,495	459,261,200	3,791	230,297	250,056,530	1,408	96,252	84,959,060
Time Check	2,307	68,139	86,925,980	2,218	73,765	82,437,480	3,230	103,976	122,382,960
Activation	485	1,512,736	0	790	3,027,273	0	1,896	8,571,460	0
Frequency Check	782	20,070	20,556,780	244	6,908	7,318,640	492	16,325	18,446,440
Drop	762	12,951	14,884,560	436	4,839	6,338,790	295	8,025	11,865,190
Feature	146	18,865	14,715,740	436	20,446	15,413,980	499	29,672	25,218,200
Promo Mention	141	5,930	4,328,500	101	4,095	4,098,520	261	10,903	10,144,460
Tips	228	9,150	12,705,280	3	186	191,780	1	62	71,920
Live-Links	66	21,450	31,376,220	67	15,101	13,253,980	59	13,561	18,944,470
Interview	49	10,503	0	57	13,639	0	57	14,983	0
Testimonial	151	7,235	7,338,710						
Clock	5	83	94,010	4	47	72,710	79	3,437	2,553,140
Location Check				20	1,057	1,063,860	64	3,792	3,837,060
Product Placement	3	186	114,590	10	692	477,600	7	473	283,350
Board	7	160	90,060						
Pop up	1	46	22,230	2	118	78,310	4	413	416,410
Web Check	1	22	21,440				2	23	6,510
Hour Starter				1	29	28,030			
Flash Card							1	28	6,510
Scroll Bar	1	47	51,310						
Icon							1	37	71,530
Total	**162,988**	**17,198,177,518**	**6,765,383,030**	**169,364**	**3,146,460,333**	**7,442,916,460**	**169,275**	**16,774,200**	**7,189,867,020**

PROGRAM CATEGORISATION

Among the select TV stations, Local content dominates the air space as more stations embrace more local dramas and engage in current affairs debates.

Figure 16: Content Split