

# Kenya Audience Research Foundation:

## **Media Establishment Survey - 2015**

(Refreshed Audience Measurement System & Living Standards Measurement)

# 2015 Media Establishment Survey

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What is KARF Establishment Survey

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Design & Implementation – (Methodology)

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Refreshing LSMs

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LSMs: Technical Considerations

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Establishment Survey Rate Card

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# What it is .....

A robust, technically accurate, nationally representative survey to provide current data on the **size** and **structure** of the **media universe** for:

- ✓ Over-time trend analysis
- ✓ Inform Government, Advertisers, Media Owners and Agencies on Kenya's media access and media usage
- ✓ Refresh the LSMs
- ✓ Refresh media topographies
- ✓ Basis for estimating media reach and profile

# Why you need it.....

- To know what the **media landscape** looks like in 2015 for strategic decision-making
- The **last such survey** was conducted was in 2007 and much has changed.
- As the basis for **estimating audiences** to television, radio, print, internet and mobile.
- As the basis for designing and **determining the parameters for the on-going tracking** media consumption for trading and scheduling

# What you will get from it includes.....

- How many households in Kenya have a television set, a set top box and other audio-visual devices?
- How many people in Kenya watch television and listen to the radio on a daily and weekly basis?
- Which television channels/ radio stations do they watch/ listen to?
- How do Kenyans watch television – on the big screen? On mobile devices?
- Where do Kenyans watch television?
- How many people read newspapers and magazines on a daily, weekly, monthly basis?
- Which titles do they read?
- Who uses the internet?
- How often and what for?
- How is the adult population segmented by socio-economic status (LSMs)?

# The Survey Methodology - Design

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- Achieved **4316 individuals aged 12+** at household level Nationally
- Face to face interviewing conducted in **February/March 2015**
- **National sample** covering urban and rural areas
- **KNBS** sampling frame used to identify sampled clusters (NASSEP V)
  - Random stratified sample proportion to population size
- Three stage selection methodology to be used:
  - Selection of clusters
  - Selection of households from the clusters picked
  - Random selection of individuals from each selected household using the Kish Grid

# The Survey Methodology - Weighting

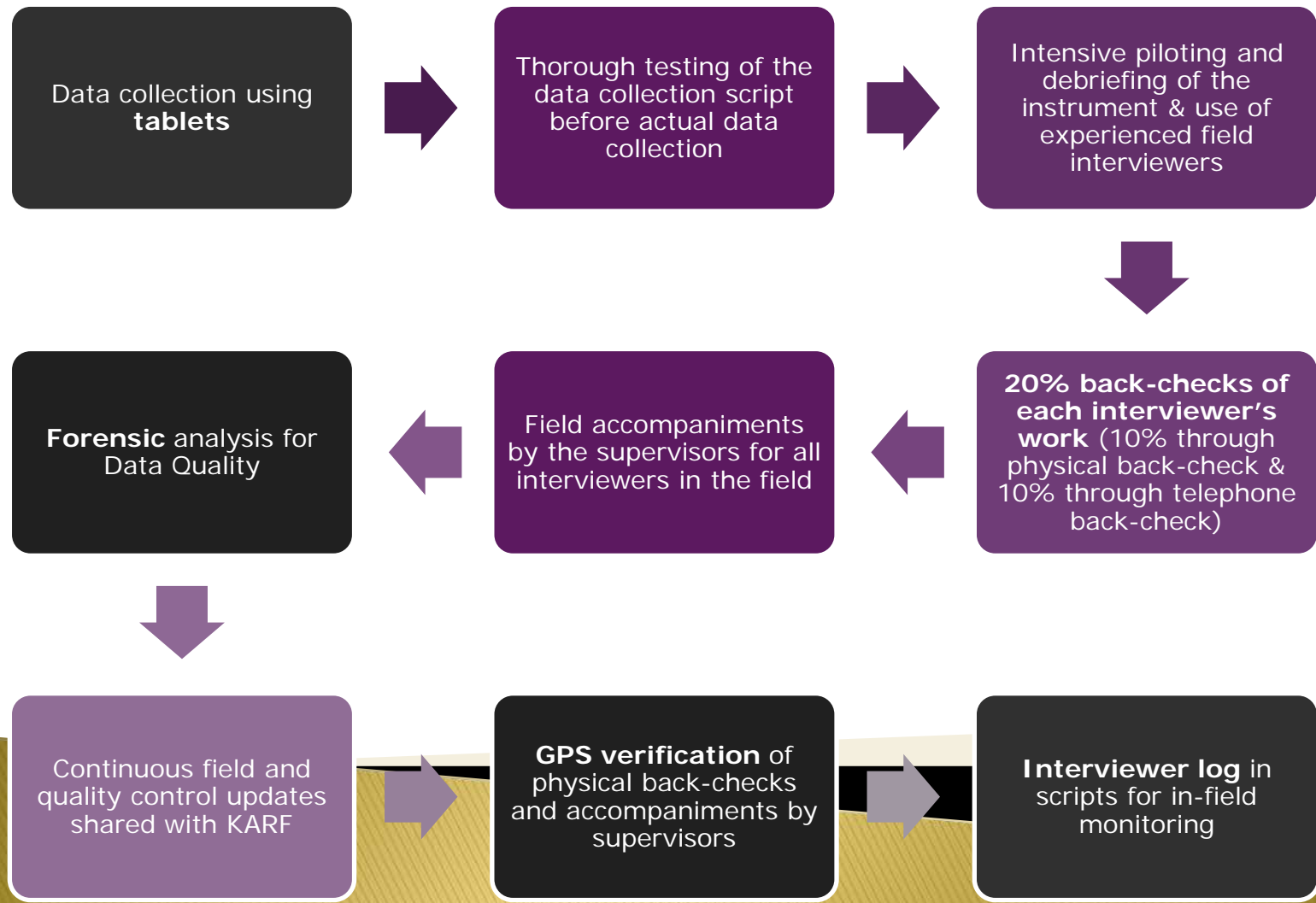
Two main reasons for weighting:

- Non-responses in the survey
- Un-equal selection probabilities of different clusters

Four stages in the weighting process:

1. Designing weights that will be computed using the **selection probabilities** derived during creation of KNBS NASSEP V sampling frame and taking into account the number of clusters sampled from each strata
2. **Adjustment of the design weights** to cater for the non-response at the household level in order to achieve the household weights
3. Further, post-stratification adjustment will be done **based on projected national estimates**. Individual weights will be computed from the household weights and using the eligible population and later adjusted for non-response
4. Final aggregate weights will be normalized and applied to the data.

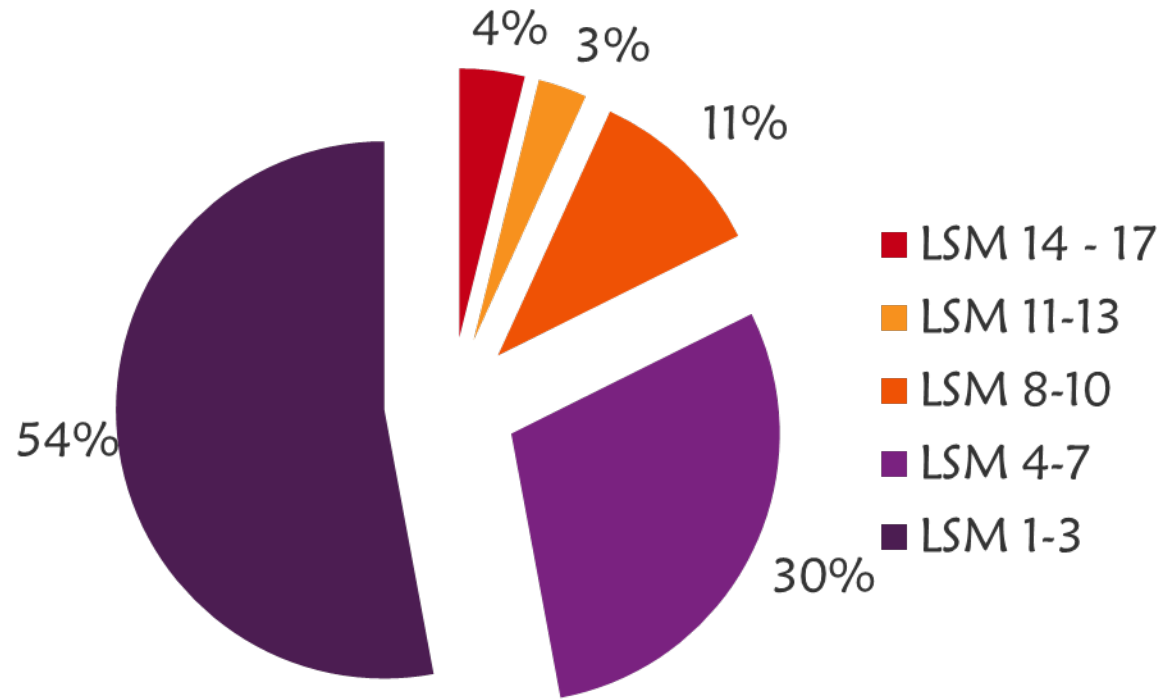
# Quality Data Collection Process





# Refreshing Living Standard Measurement(LSM)

Old LSM structure in Kenya



# Old predictor questions

## Individual predictors

- Access to internet – past 4 weeks
- Read newspaper
- Email access
- Bank account
- Purchase of adult clothing

## Household predictors

- TV
- PAY TV subscription
- Kitchen sink
- Microwave
- Electric iron
- Fixed line
- Watch TV L7D
- Automatic washing machine
- Refrigerator
- Hi-fi/ music centre
- Free standing deep freezer
- Video camera
- Live in a house, cluster or condominium
- Vehicles owned

# Diversified Household Durables

Examples !!!

Different TV types may be a differentiator

Pay TV has evolved from traditional DSTV which traditionally was a sign of affluence

Mobile phones are now the norm but smartphones may be more differentiating

While computers are still not a household norm, tablets have can potentially reclassify digital users

Fixed land line not relevant anymore

Examples of other discriminating variables

- Home ownership vs. rental
- Roofing material
- Type of infrastructure available in the dwelling area
- Frequency of using technology devices
- Level of income
- Level of spending

# Establishment Survey - Rate Card for Advertisers

SUBSCRIBER CATEGORY	PRODUCT	COST Kshs	NOTES
Advertisers	Full Data Set (TV, Radio, Print and Internet)	450,000.00	National Coverage
	Full Data Set (TV, Radio, Print and Internet)	200,000.00	Cost for each Topography (If buying for specific topographies)

**Note:**

- 1.The Establishment Survey rate charge is a “One Off” and should be paid immediately
- 2.All quoted prices are VAT exclusive
- 3.The data should be used under the strict “terms of use” listed below

**What to expect (Administrative):**

- a)Snapshot report in Power Point format through a secured link
- b)Telmar Data, SPSS data, Quanvert data, Z Plan data. Software for the data formats mentioned should be purchased from the supplier directly.
- c)Mining and Analysing the data to specific requirements will be charged at a separate rate card

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