



Adapting to a **DISRUPTED** MEDIA LANDSCAPE

30 October, 2020

Ipsos Audience Measurement

GAME CHANGERS





POV on
Media
Disruption

*There is one thing stronger
than all the armies in the
world, and that is **an idea
whose time has come***

→
Victor Hugo

ADAPTING TO A DISRUPTED MEDIA LANDSCAPE



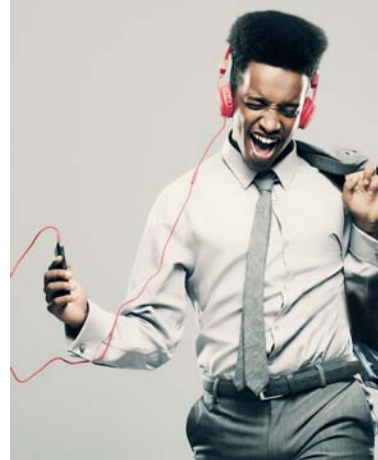
1

Audience scene
today



2

Content and
packaging



3

Audience -
shifting
touchpoints

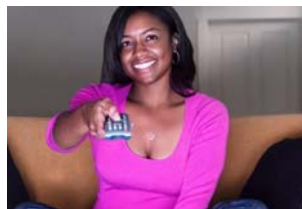
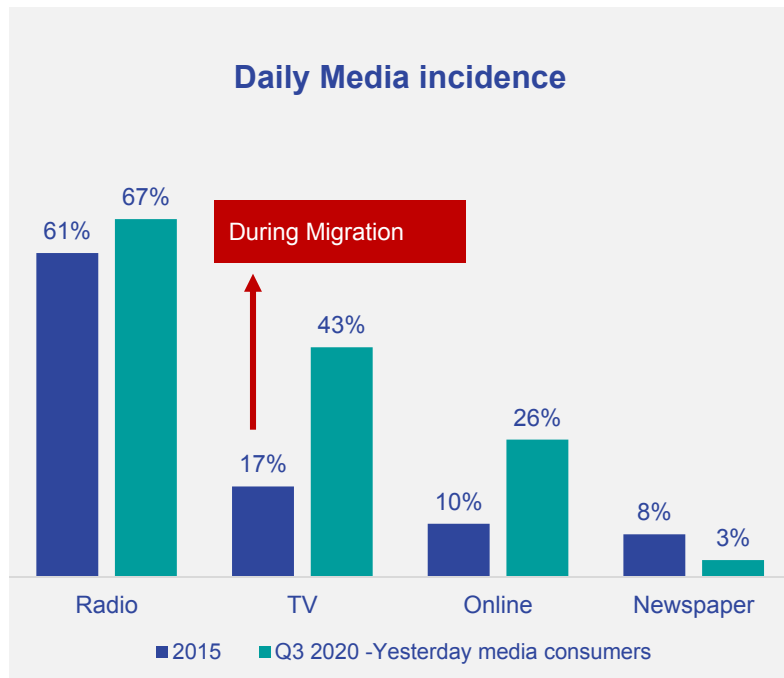
AUDIENCE SCENE TODAY

1

Fragmented media and discerning audiences

TV VIEWERSHIP WAS LOW IN 2015 AFTER DIGITAL MIGRATION DISRUPTED THE STATUS QUO. TV VIEWERSHIP AS A CATEGORY HAS GREATLY STABILIZED BUT ONLINE PLATFORM IS THE NEW THREAT

Print readership disrupted; available, real-time online content is a big threat



TV

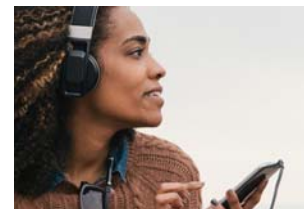
TV consumption has bounced back after initial hitches occasioned by the migration 5 years ago

Local TV dominating the TV space, but we see some international Media expanding their audience base as people seek out for global News, Drama, Entertainment, Sports, Documentary and investigative series



PRINT

Social distancing due to Covid-19 could be having an impact on print readership as the usual public glances on Newspaper stands is reduced



ONLINE

Online media engagement is our greatest disruptor

FRAGMENTATION IS A NIGHTMARE FOR MEDIA PLANNERS AND SMALL STRUGGLING CHANNELS. THE AUDIENCE IS NOT GROWING AS FAST AS THE STATIONS AND COMPETITION FOR THE FEW IS BIG.

From 14 local FTA channels before migration to over 80 in 2020; Radio from 100 to 140+ stations

5yrs

Since Kenya shifted TV transmission from analogue to digital



Kenyans have now adapted to the digital normal.

86%

of the country is DTT (Digital Terrestrial Television) covered according to the regulator - CA

90%

DTT providers are leading the TV decoder market share by over 90%

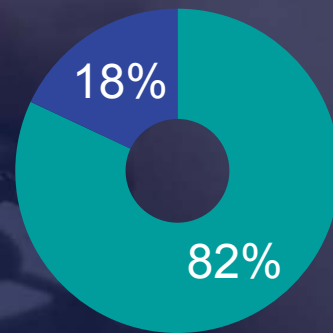
18%

of the DTT Set-Top Boxes are FTA (approx.), meaning they do not pay monthly for their content - Ipsos



There is a small market for Direct-To-Home (DTH) e.g. DSTV due to Entry and premium packaging costs despite coming into this market first

STB Ownership



■ Pay TV Set-Top Box ■ Free-To-Air Set-Top Box

Source: Ipsos Jul, 2019

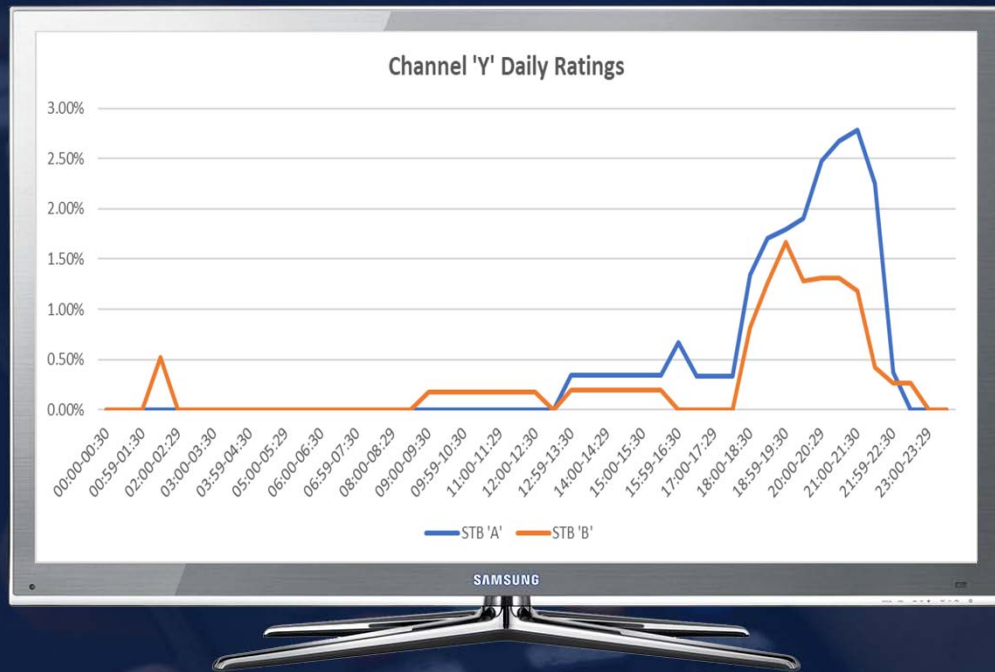
DOES STB PROVIDER MATTER? RECEPTION AND DISTRIBUTION PATTERNS ARE NOT UNIFORM

Same channel delivers different results

Channels register different results from different STB providers;

This is due to the different geographical and socio-economic zoning of their decoders

The scenario is worse for the smaller (niche) channels that do not appear in every pay platform as they lose their potential audiences due to this digital 'discrimination'



DISRUPTION IN RADIO // MAIN ETHNIC LANGUAGES HAVE MULTIPLE VERNACULAR STATIONS BROADCASTING IN THEIR RESPECTIVE LANGUAGE, SLOWLY SPELLING DOOM TO NATIONALLY INCLINED STATIONS

Vernacular radio has taken over the radio airspace

Vernacular content, historically activated to address the information needs of the less educated (Swahili-illiterate) has changed form

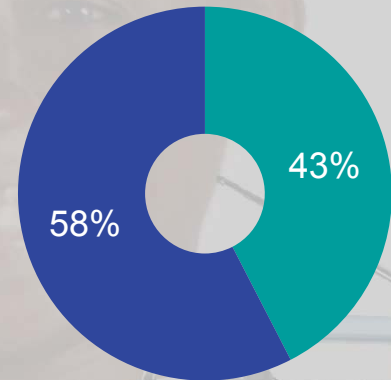
In the early days of independence, KBC used to give vernacular tongues a few hours of broadcast each as several ethnic languages used to share the same frequency

Today, the face of vernacular radio does not address any form of ignorance but seeks to grow profit by tapping into the cultural connectivity.

- This has been replicated successfully with Television

English radio has shrunk considerably

- Their discussion point content is being adapted by other Swahili/sheng stations e.g. relationships
- Online 'early adaptors' community has taken the profile of the English radio consumer, hence slowly reducing their time scope on radio



■ National ■ Vernacular & Others

CONTENT & PACKAGING

Robust and innovative

2



TECHNOLOGY HAS CAUSED ITS FAIR SHARE OF DISRUPTION // INTERNET OF THINGS



THE MOBILE PHONE

Popularity of the Second Screen



Now smart phones are more affordable and available as a ready touchpoint on the go



they offer an unrivalled access to cross-media opportunity – Radio, TV, Social media, print etc



Smart TVs are a growing phenomena as well

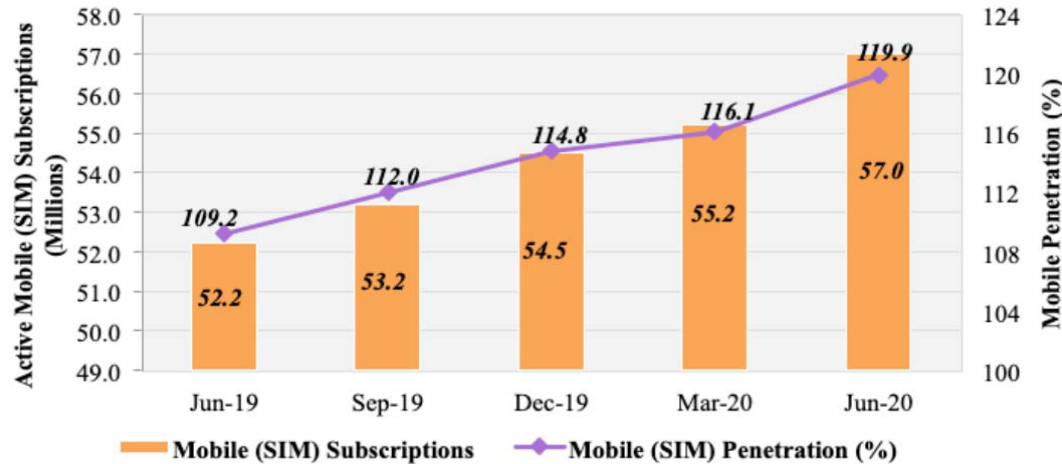


The mobile screen is the greatest piece of technology causing the greatest disruption in this market (and beyond) so far



COVID-19 PANDEMIC HAS PUSHED INSTITUTIONS INCLUDING THE GOVERNMENT TO ADAPT TO E-SERVICES, MOBILE MONEY AND WORK FROM HOME APPROACHES AS A WAY OF REDUCING THE SPREAD OF THIS VIRUS. ALL THESE, ACCORDING TO CA INDICATORS HAS LED TO MORE UPTAKE OF THE RELEVANT MOBILES PHONES (SIMS) TO MEET COMPLIANCE. THE NEW ORDER OF DOING THINGS MAY NEVER BE REVERSED COMPLETELY

Mobile device penetration

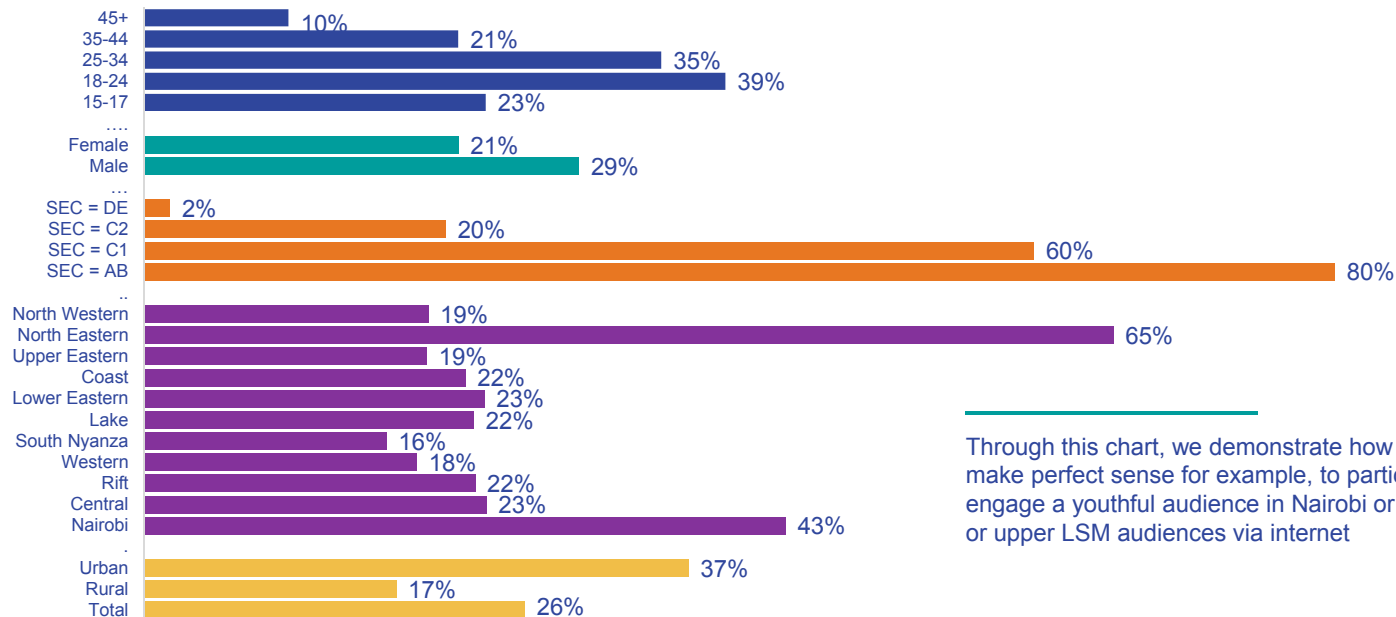


Source: CA, Operators' Returns.

According to CA, mobile SIM subscriptions continue to rise due to factors such as SMS and data promotions & tariffs

ACCORDING TO OUR LATEST AUDIENCE SURVEY, 26% OF AGE 15+ KENYANS (OR 99% OF DAILY ONLINE USERS) ACCESS INTERNET THROUGH THEIR MOBILE PHONES. THIS VARIES BY REGION, SOCIAL CLASS AND AGE. TARGETING THE ONLINE COMMUNITY REQUIRES ONE TO UNDERSTAND THIS DIVERSITY

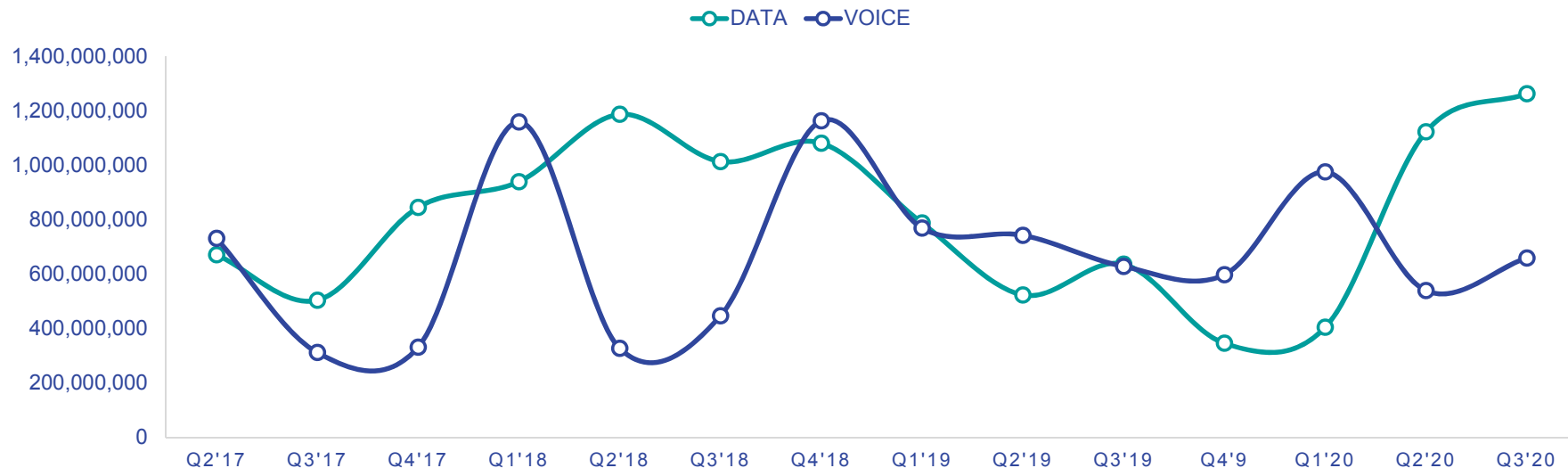
Internet access via mobile phone



Through this chart, we demonstrate how it would make perfect sense for example, to particularly engage a youthful audience in Nairobi or Garissa, or upper LSM audiences via internet

AN ATTEMPT BY THE TELCO INDUSTRY TO PUSH VOICE UP EARLY IN THE YEAR WAS SHELVED AS COVID-19 PANDEMIC HIT THE NATION AND DATA CAMPAIGNS TOOK OVER FROM Q2 2020. DISCOUNTED DATA IS RAMPANT AND PARTLY EXPLAIN WHY TIME ON THE INTERNET IS ON THE RISE. NOWADAYS WE MEET ONLINE!

Data Vs Voice Exposure (KES)



Ipsos AUM Monitoring data - 2020

THE DISRUPTED PRINT SCENE IS CALLING FOR RADICAL SHIFTS

Print re-inventing its offering

- Digital and online print publications is a growing phenomena as readership numbers decrease
- The traditional columnist could well be today's celebrity blogger or entertainer
- Recent collaboration between publishers and a leading telco seek to promote uptake of digital print
- Communication gaps exist because these print digital offerings are only promoted by the sister outlets from the same media houses, thus leaving out those who do not patronize such outlets

New tech at Kemri to enable Kenya to mass test for virus

Country's previous battles against HIV and TB have made it possible for experts to develop new testing machine

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Kenya has overcome a major bottleneck in mass testing for coronavirus, thanks to an innovation by the Kenya Medical Research Institute (Kemri).

In a twist of irony, response to diseases that brought Kenya to its knees in the last decade — Aids, tuberculosis and a brush with the deadly avian flu in 2009 — is what has enabled this breakthrough.

From the current 600 tests per day, the innovation at Kemri will see Kenya process and get results for at least 15,000 samples in 24 hours.

Kemri will now use the Cobas 6800 or the 8800 HIV viral load machines and the GeneXpert used for point of care testing for tuberculosis. Prof Matilu Mwau, Kemri Busia director, told the Nation that the Cobas machine is able to run as many as 5,000 tests in a day.

"In the unlikely event that we get to that point, we will be ready," he said in a recent interview.

Health Cabinet Secretary Mutahi Nguni in his daily updates

labs in the country also own them.

In a previous interview, GeneXpert coordinator Jeremiah Okari told the Nation that the machines are especially efficient at detecting pulmonary TB, a respiratory illness like Covid-19.

For the machines to switch from HIV and TB tests to Covid-19, the government through the Kenya Medical Supplies Authority (Kemsu) will order 100,000 special kits from Switzerland, with support from the World Health Organisation (WHO) Emergency Response Centre and the World Bank.

Kemri Director Jonah Manjari told the Nation that the agency has ordered for the Cobas Sars-CoV-2 machines manufactured by Swiss multinational Roche, a kit that is able to test up to 4,128 patients in a day.

"Roche said they would be here in two weeks from their warehouses, and could be here faster if the clearing is done quickly," he said.

The GeneXpert uses the Cepheid's Covid-19 test and is able



Kenya Medical Research Institute Deputy Director Matilu Mwau explains how the Cobas 8800 automated testing machine works in Nairobi yesterday. It is capable of testing 5,000 Covid-19 samples in a day.

to provide accurate results in 45 minutes. So how will these work?

Using the juice-making analogy, Lancet Laboratories Director Ahmed Kalebi said the Cobas 6800/8800 and the GeneXpert are 'blenders' which need 'sieves' to make different types of juice.

However, these two 'blenders' have 'sieves' for making mango juices (testing HIV and TB) but also have the capability to take other sieves for orange juice (test for Covid-19). It is these 'sieves' that

Kemri has ordered for the Sars-CoV-2 and Cepheid's Covid-19 test.

According to Omu Amala, a member of the national Covid-19 task force and a professor of viro-

logy and all of the three have to be positive for a diagnosis to be confirmed.

While there are several challenges that Kenya is experiencing with controlling Covid-19, the government has received praise from the regional health governing bodies for their laboratory capacity.

The Africa Centres for Disease Control and Prevention (Africa CDC) and its American doppelganger raised the alarm that the figures in Kenya, and Africa in general, could be an under-representation due to limited testing capacity.

In a virtual meeting, Africa CDC Director Dr John Nkomo said

this infectivity R₀, or the R-naught,

are positive from those who are healthy is targeted to reduce the R-naught to less than one. Studies that have been carried out in Wuhan and other places show that, when unchecked, the R₀ of Covid-19 is between 2 and 3, meaning that every infected person infects two to three others.

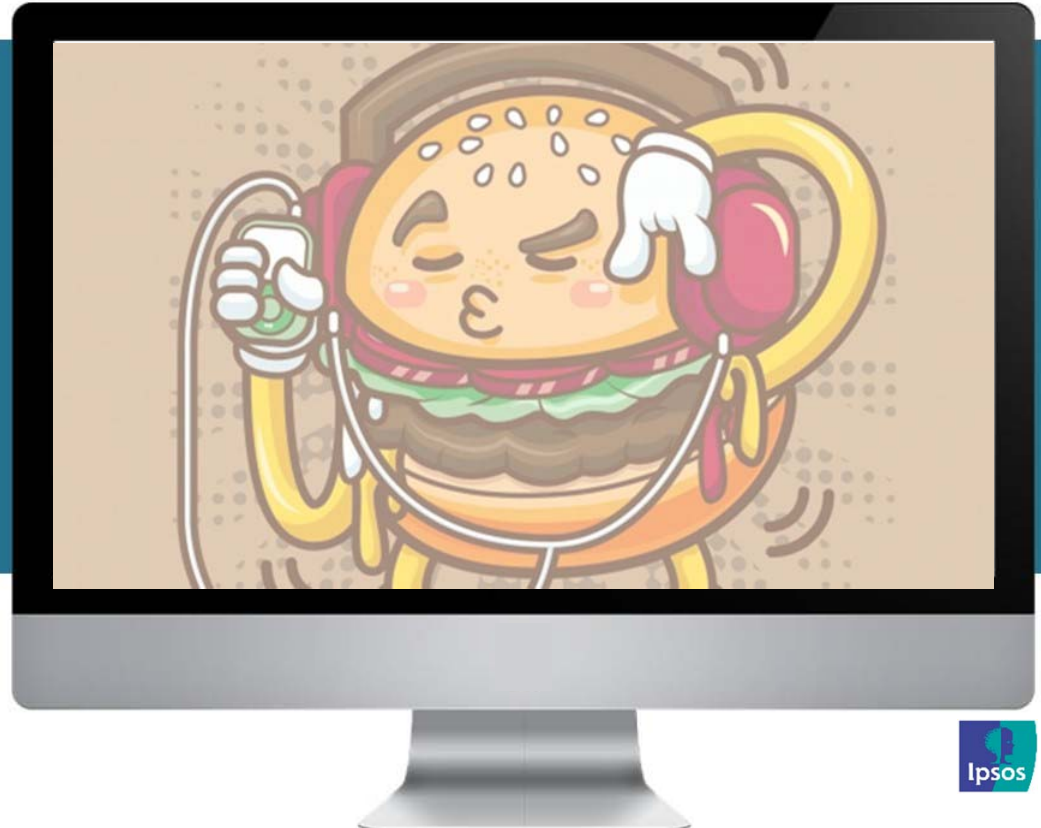
An R₀ of less than 1 indicates that each infected person results in less than one new infection. When this happens, the outbreak will slowly grind to a halt.

The mass testing in Kenya has been hampered by lack of coronavirus test supplies ending in a

WILL CONTENT DISRUPTION LEAD YOU TO ‘THINK OR SINK!’?

Content packaging

- The way some of the content was being delivered has been altered a great deal during the Covid-19 season
- In our audience survey conducted in April this year, we found out that Comedy (Funny clips), Video and News are the most preferred Video content in this market
- Those who have repackaged their content e.g. comedy, to fit with their online audience requirements are growing their base.
- Personalities are becoming household names using this approach and are today admired celebrities
- Leveraging on the new content and creativity through collaborations may be the best options for the legacy media industry to survive and thrive



SHIFTING TOUCHPOINTS

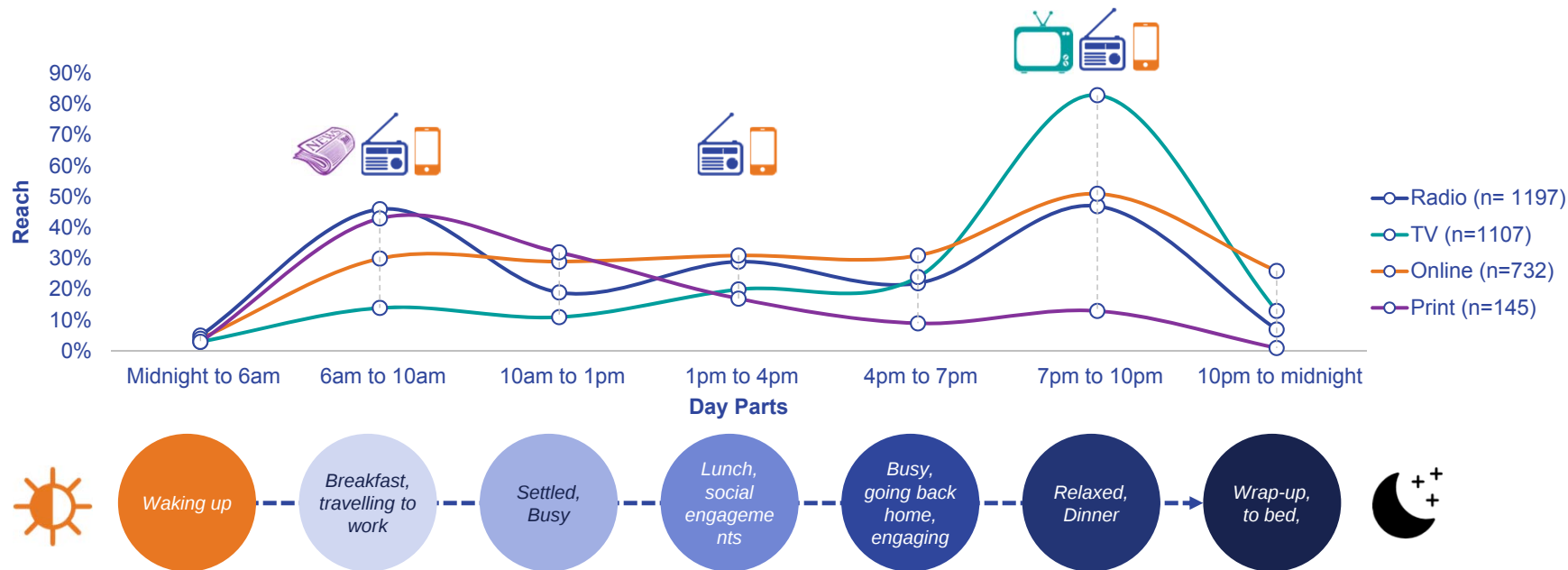
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Wider choices now available

CONSUMER IS NOW KING; MY MEDIA, WHEN I NEED IT, HOW I WANT IT

Cross media opportunities accompany the media consumer throughout the day. We walk you through this consumer using our audience surveys, as follows;-

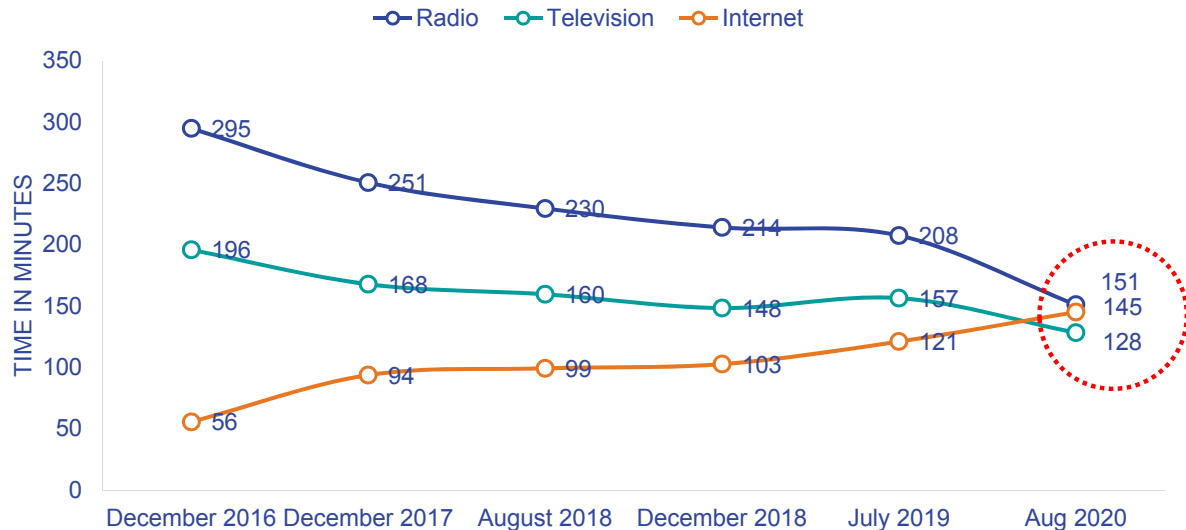
Daily Audience interaction with touchpoints



Ipsos

MEDIA TIME MANAGEMENT IS MORE CRITICAL NOW FOLLOWING THE CONSUMERS DAILY HABITS AND TIME SPENT ON THE DIFFERENT TOUCHPOINTS

More time on online platforms affecting legacy media time



Media touchpoints are at a point of convergence and possibility of swapping places is real where time spent on legacy platforms will continue to shrink as online platforms rise

With regular monitoring of these patterns, stakeholders can allocate the right resources to specific areas and build impact through creative communication approaches

IN CONCLUSION...



NOW THAT
DISRUPTION IS
UPON US,
**WHAT
NEXT?**

01.

CONTENT



What next?

Media Owners

- Collaborate more with private content developers and use their appeal to increase footprint
- Collaborate with others to shield the category from external pressures and threats

Advertisers

- Good to note that vernacular audiences and content today are well informed and language is simply a vehicle
- Nothing goes to waste. Content that could not see light of day in legacy media now creating celebrities and influencers

Agencies

- Open yourselves more to cross media opportunities
- Invest more on research and expanded media platform formations

02.

PACKAGING



What next?

Media Owners

- Embrace and invest in new technologies
- Package and record content with cross media adaptability
- Adapt early to emerging technologies in order to avoid vacuums; before someone else step in

Advertisers

- Take note of expanding online channels in the form of private bloggers and influencers
- Seek to understand the consumer beyond the general demographics

Agencies

- Seek to deeply understand the consumer journey, touchpoints
- Working closer with creative teams in unpacking the lifestyles of the new discerning consumer

03.

AUDIENCE



What next?

Audiences are shifting in terms of platforms

At Ipsos, we have and continue working on solutions to capture both offline and online audiences

Audiences are also shifting in terms of content-Genres

Through integration of audience and monitoring data, we advise media and brand managers on the programs ranking to help them in placements

Eventually, the future will definitely be more digital

Ipsos can now, by the help of a profiler tool advise on the whereabouts of the online audiences and their affiliations

**BE
SURE.
GO
FURTHER.**

GAME CHANGERS

