
Period MARCH - MAY'19

KARF AUDIENCE TRACKER 2019

SNAPSHOT FINDINGS

Royal Media Services Report

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What to Expect

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TV Viewership

By KARF For RMS Internal Use

KARF Tracker Survey Methodology

1. **Fixed panel Target:** 3000 daily sample nationally aged 15+ years
2. **Average Daily Achieved Sample:** March n=2,222 ,April n=2070 and May n=2039.
3. **Single Data Sourcing** for TV, Radio, Print and Online data
4. **Sampling frame** is based on KARF Establishment Survey 2015(Using KNBS, NASSEP V)
5. **Face to Face recruitment** of panelists to verify LSM's and training on the process
6. **CATI-** (Computer Aided Telephonic Interviews)
7. **Key Analysis Variables** - Age, gender, LSM, topography, rural/urban
8. **Survey Period:** March – May 2019
9. **Time Segment:** 30 minutes blocks for Television & Radio, daily readership for print and daily Internet usage habits.
10. The Research Covers **Quantitative** research and NOT **Qualitative**.

Definitions

- ▶ **Media Topography** : The purpose of the topographies is to divide the country geographically in such a way as to define areas which are internally homogeneous and externally heterogeneous with respect to radio station audiences.
- ▶ **Reach** : The proportion of the population/respondents that tuned in to a particular station for at least 5 minutes in a 30 minutes block
- ▶ **Trend** : Audience estimate expressed as a percentage of the population within a specific time segment. To know which time of the day delivers significant audience sizes
- ▶ **Source of 19.0M base** : Past 7 Days Media Consumers in Kenya (Television/Radio Print And Internet) as per the KARF Establishment Survey (Feb/Mar 2015).
- ▶ **Share** : The percentage of the total viewing or listening audience watching over a given period of time. Share is the % of a station's total time spent over the total time spent across all stations/channels.
- ▶ **Affinity** : Is the target reach over the total reach. It is the number of Audience a brand is likely to reach through a Station/Channel, the higher the number the higher the affinity, the higher the likelihood of the brand to reach the target audience through the station.
- ▶ **Urban** : Is an area with an increased density of human-created structures in comparison to the areas surrounding it and has a population of 2,000 and above. In this definition, urban areas include the following: Cities, Municipalities, Town Councils and Urban councils.
- ▶ **Rural** : Is a large and isolated areas of an open country (in reference to open fields and not forests, etc.), often with low population density

What has been Tracked so far



363+ radiostations
and growing



481+ TV Stations
and growing on digital
Platform. 66 TV
Channels are local



44 Newspapers and growing

62+ Magazines

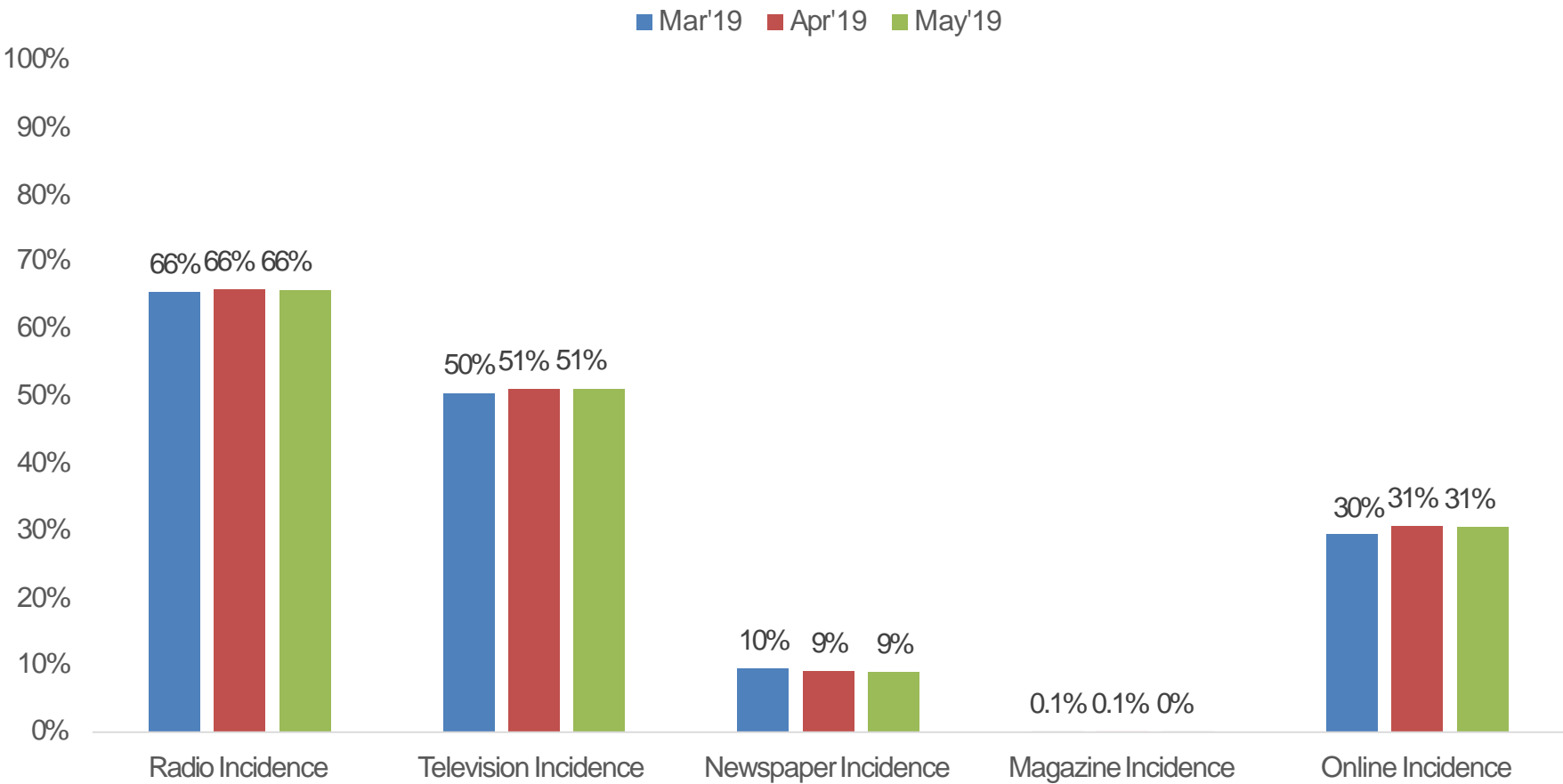
Radio continues to be king as it has high penetration or levels of access; and there has also been a significant growth of community radio stations which has increased the geographical footprint compared to other media platforms

Media ownership (mostly in the hands of political actors) controlling multiple media channels.



314 Online sites/applications

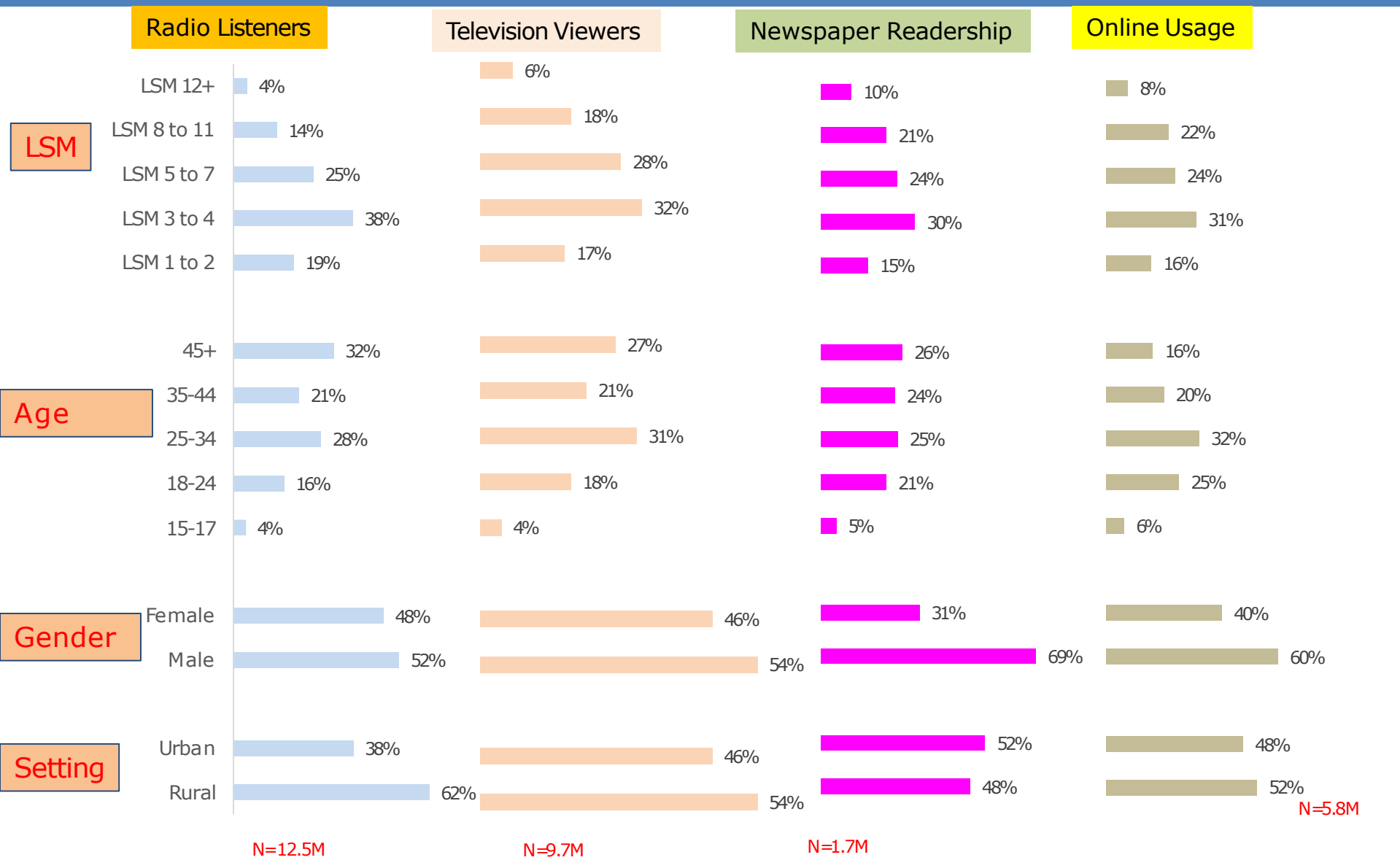
Average Daily Media Incidence by Channel Type



Base=19.0M Past 7 Day Media Consumers
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

Demographics by Media Channels



Base=19.0M Past 7 Day Media Consumers
Source: KARF Tracker May 2019

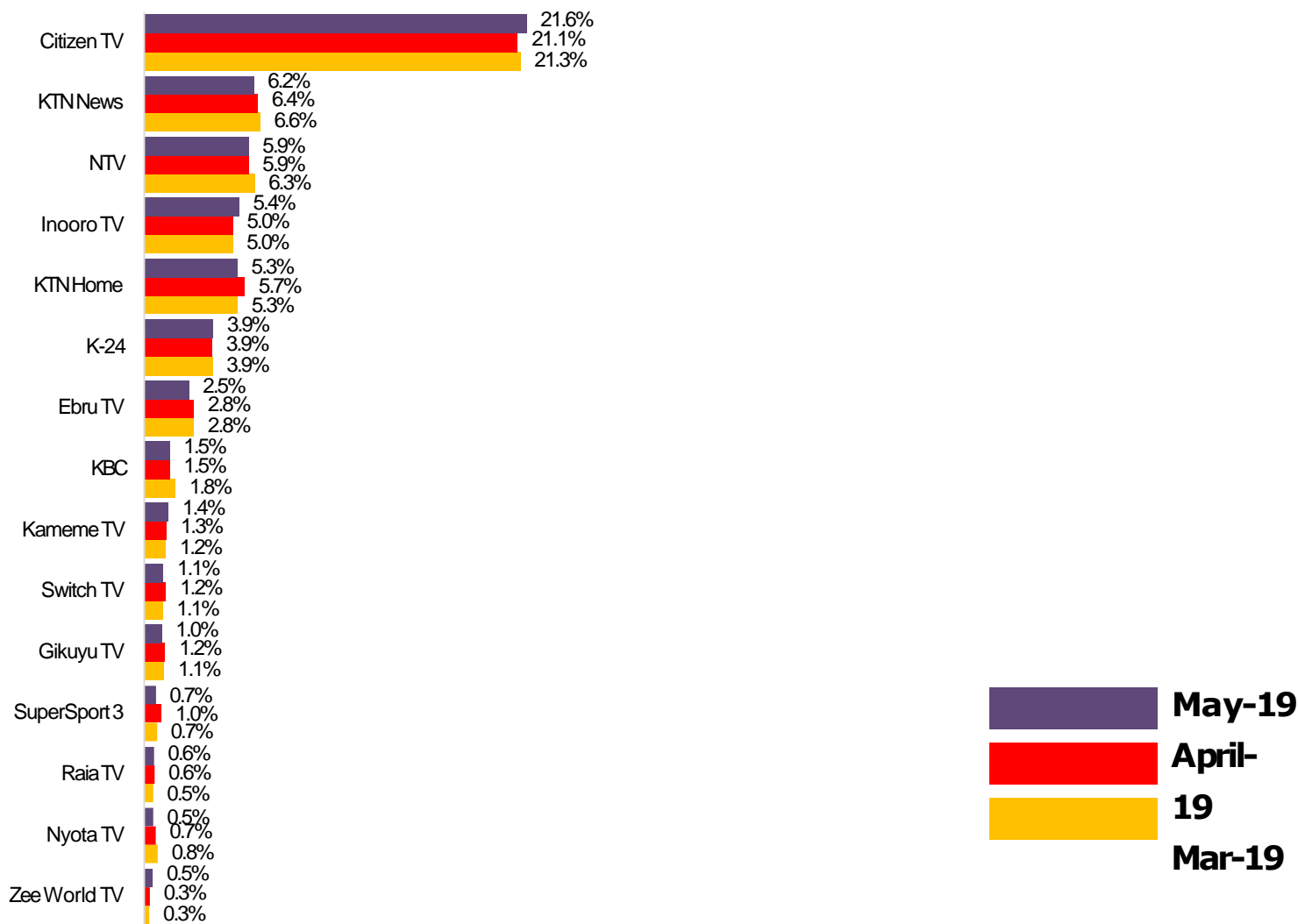
By KARF For RMS Internal Use



AVERAGE DAILY TV REACH

- **Reach** : The proportion of the population/respondents that tuned in to a particular station for at least 5 minutes in a 30 minutes block, it shows the station/channel with highest/lowest incidence of viewership

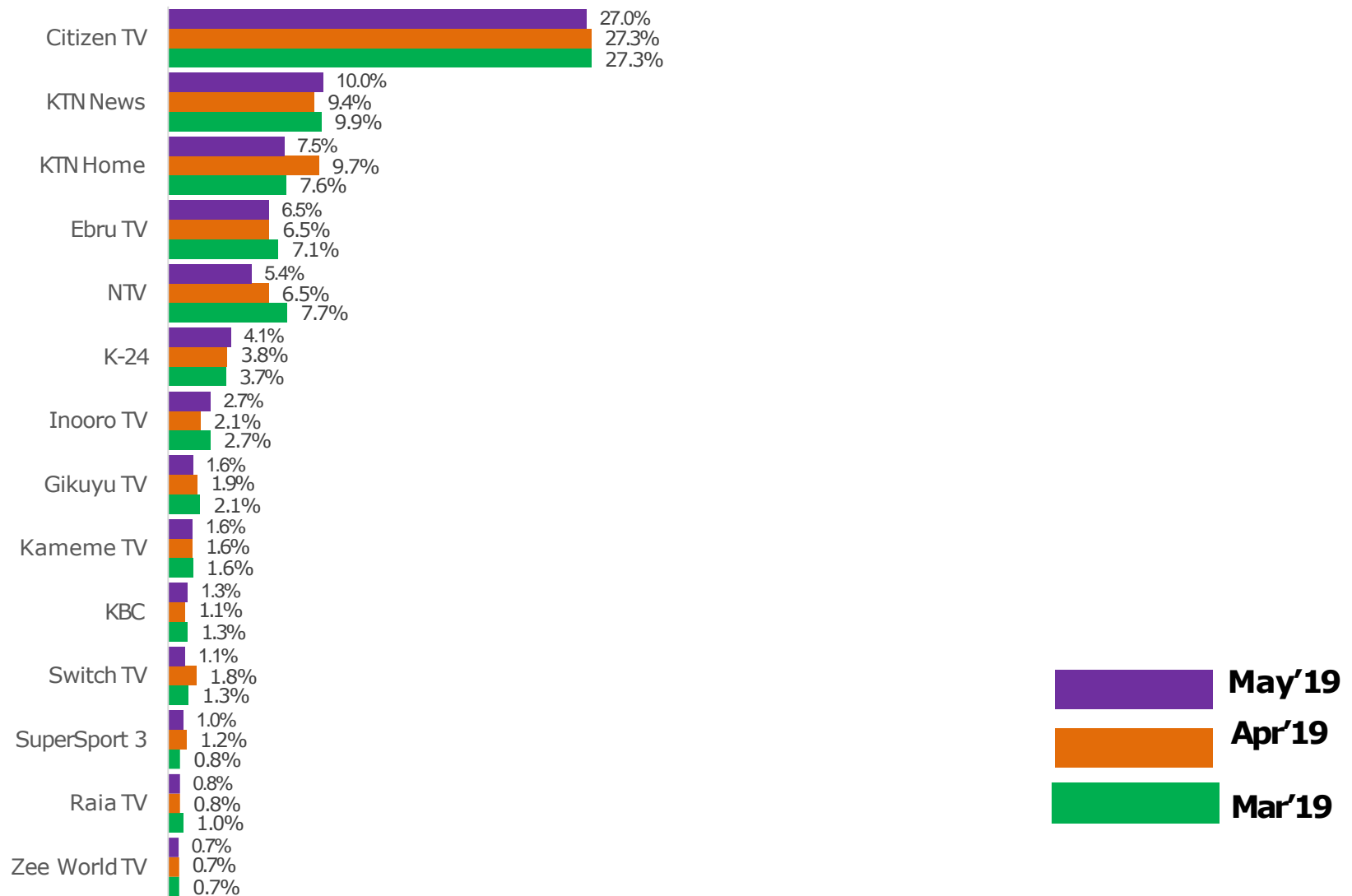
Average Daily TV Reach –Top Channels - National



Base=19.0M Past 7 Day Media Consumers
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

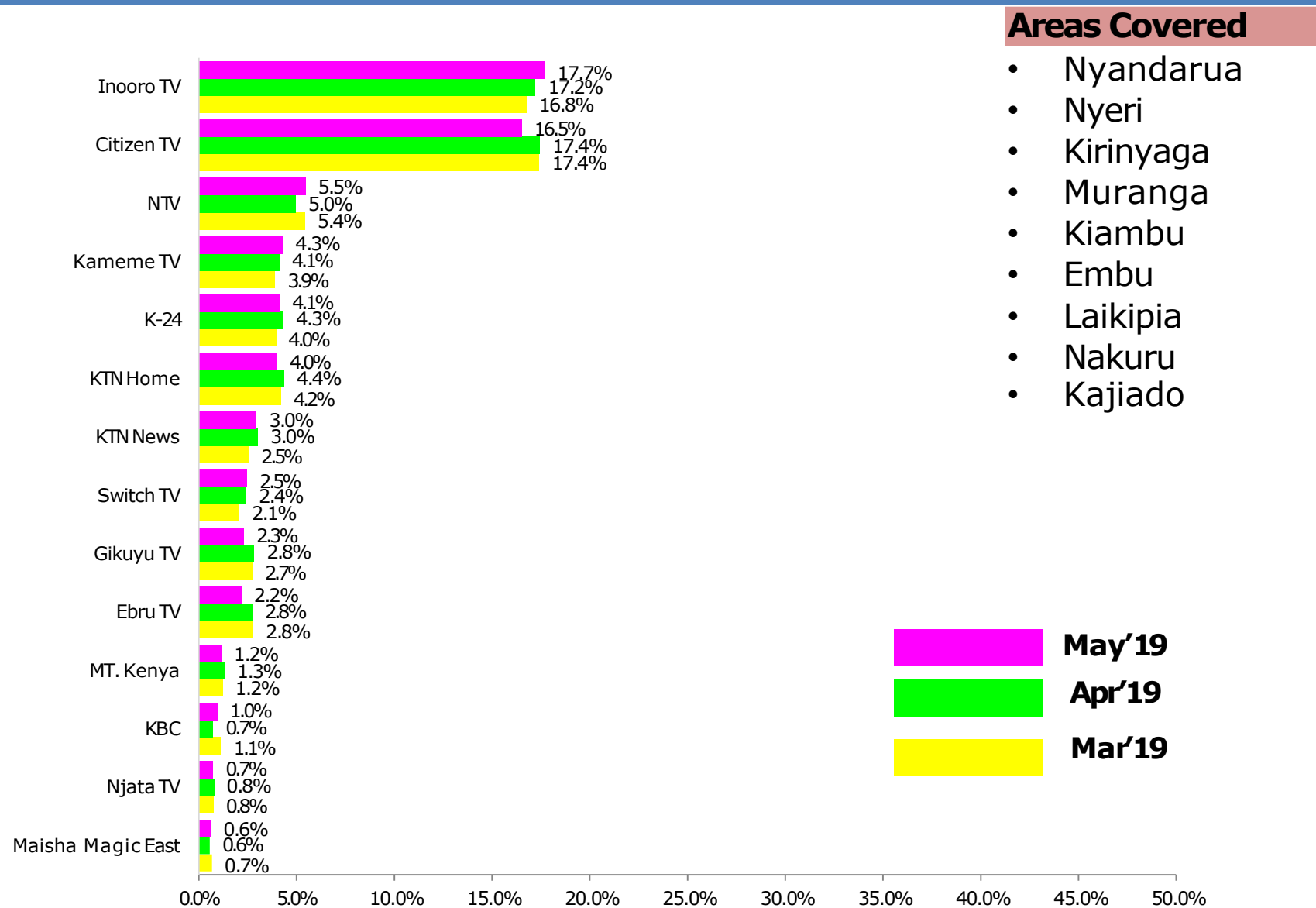
Average Daily TV Reach - Nairobi



Base=2.1M Past 7 Day Media Consumers in Nairobi
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

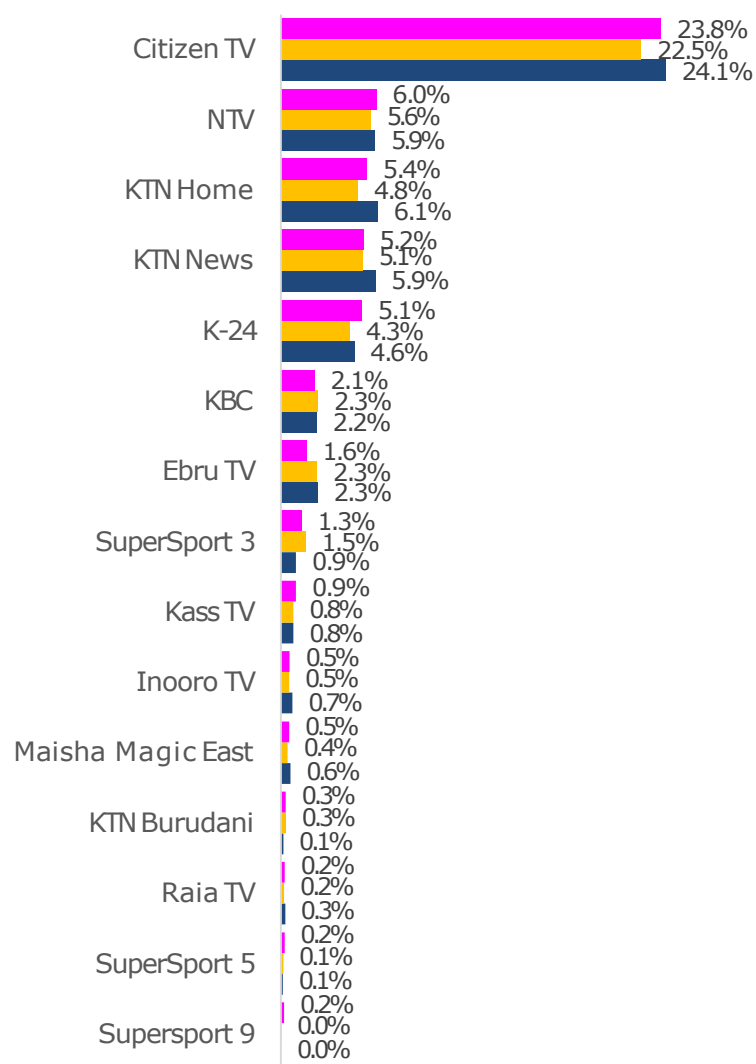
Average Daily TV Reach –Central



Base=4.6M Past 7 Day Media Consumers in Central
Source: KARF Tracker March –May'19

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Average Daily TV Reach – Rift



Areas Covered

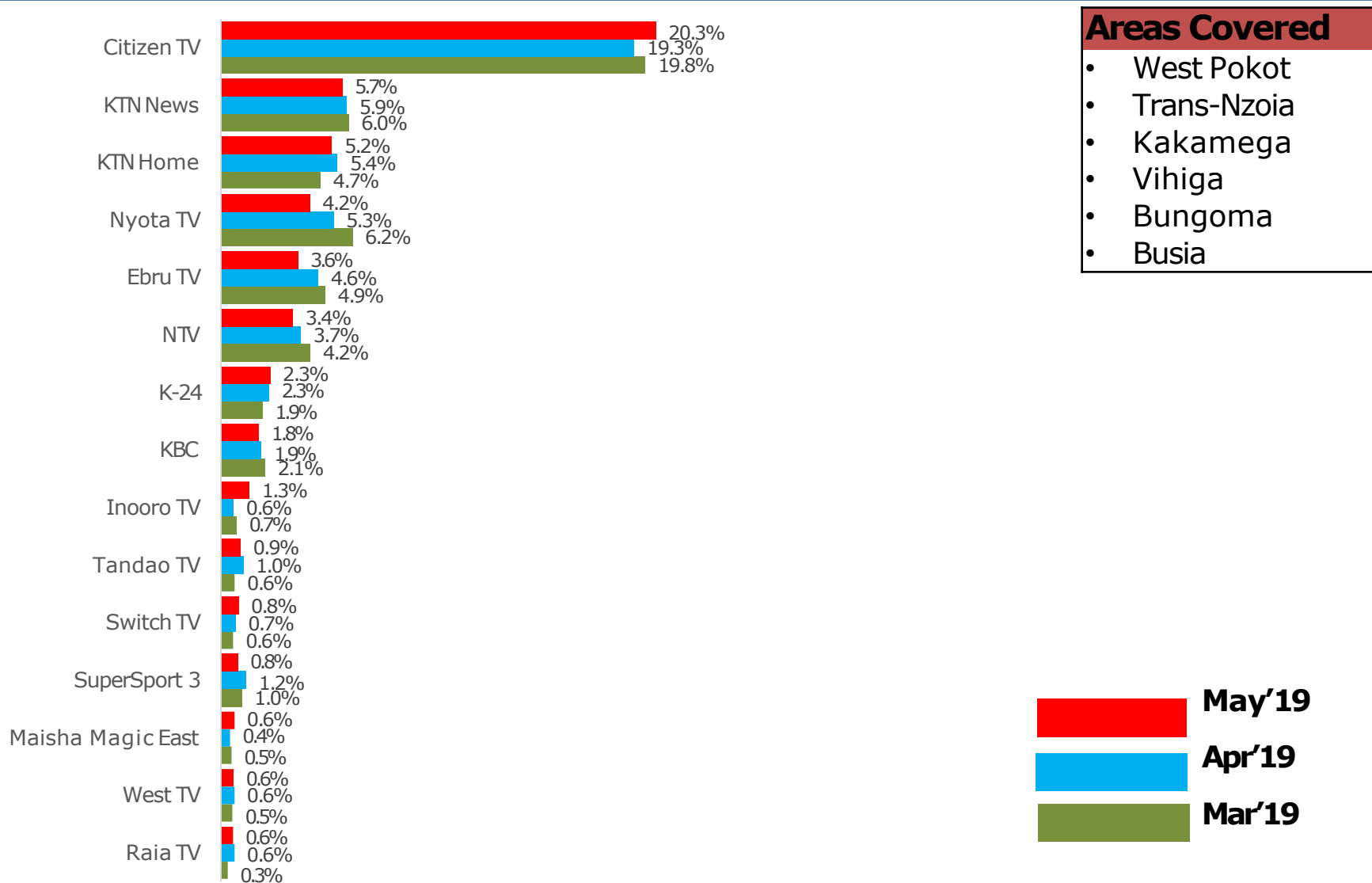
- Baringo
- Uasin Gishu
- Elgeyo Marakwet
- Nandi
- Narok
- Kericho
- Bomet



Base=2.4M Past 7 Day Media Consumers in Rift
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

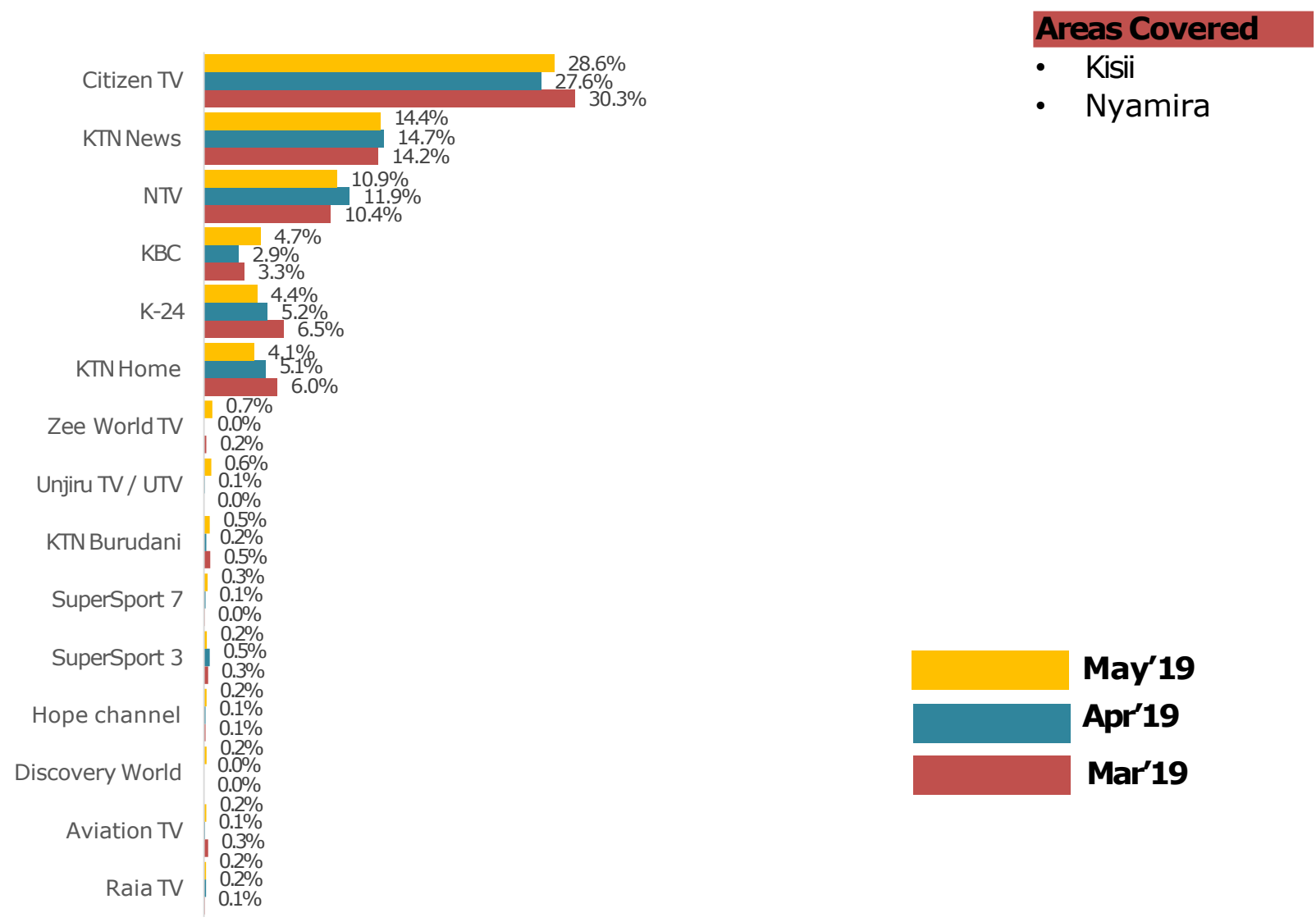
Average Daily TV Reach – Western



Base=2.3M Past 7 Day Media Consumers in Western
Source: KARF Tracker March –May'19

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Average Daily TV Reach - South Nyanza



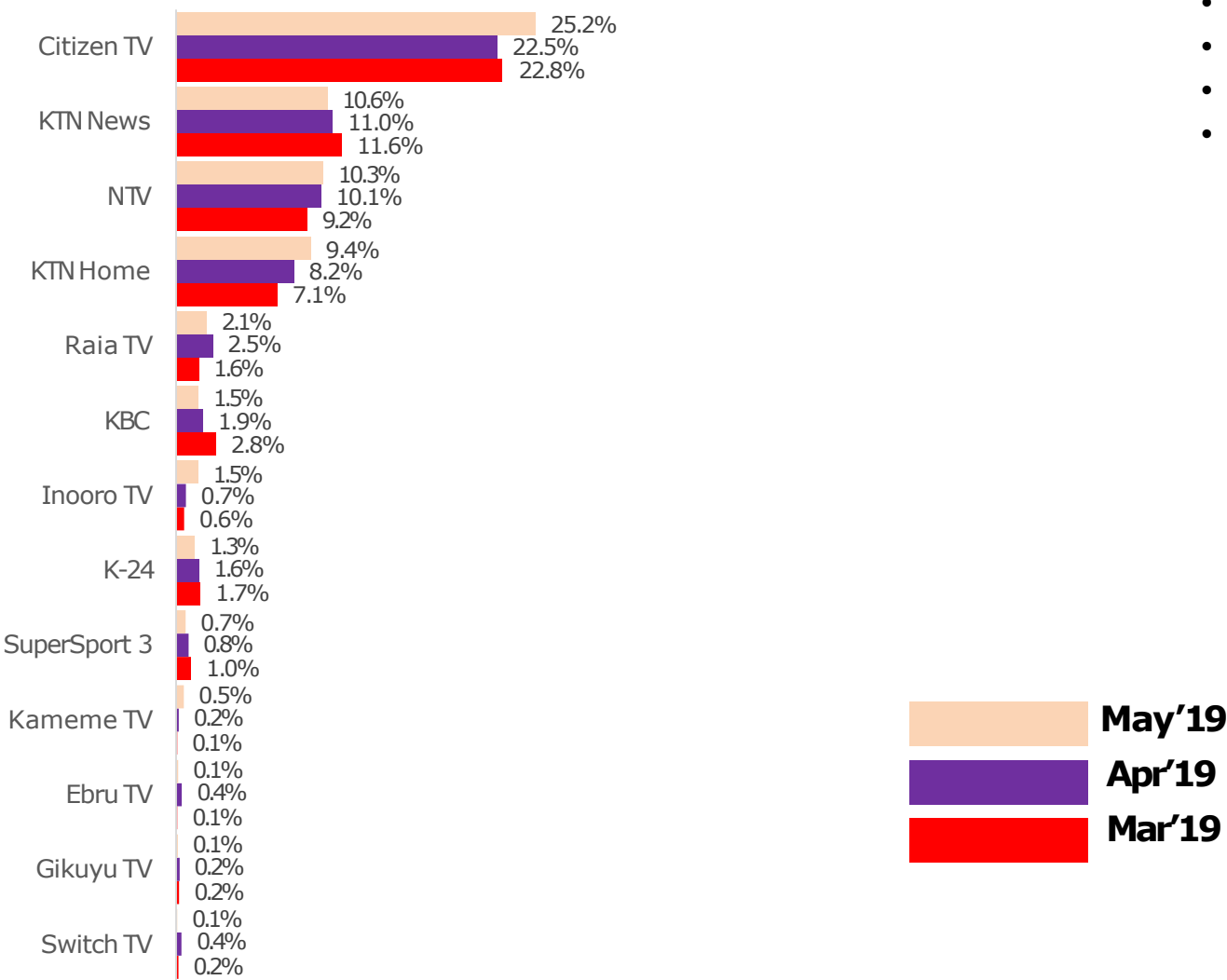
Base=749,605 Past 7 Day Media Consumers in South Nyanza
Source: KARF Tracker March –May'19

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Average Daily TV Reach –Lake

Areas Covered

- Siaya
- Kisumu
- Migori
- Homa Bay



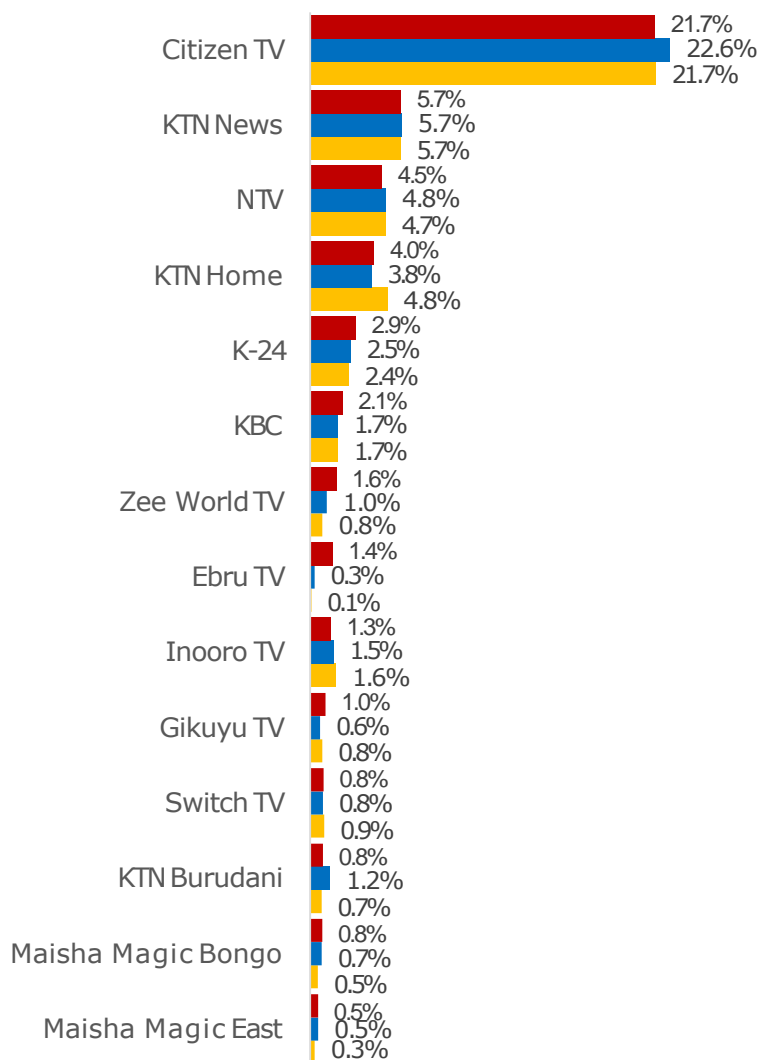
Base=2.3M Past 7 Day Media Consumers inLake
Source: KARFTracker March –May'19

By KARF For RMS Internal Use

Average Daily TV Reach - Lower Eastern

Areas Covered

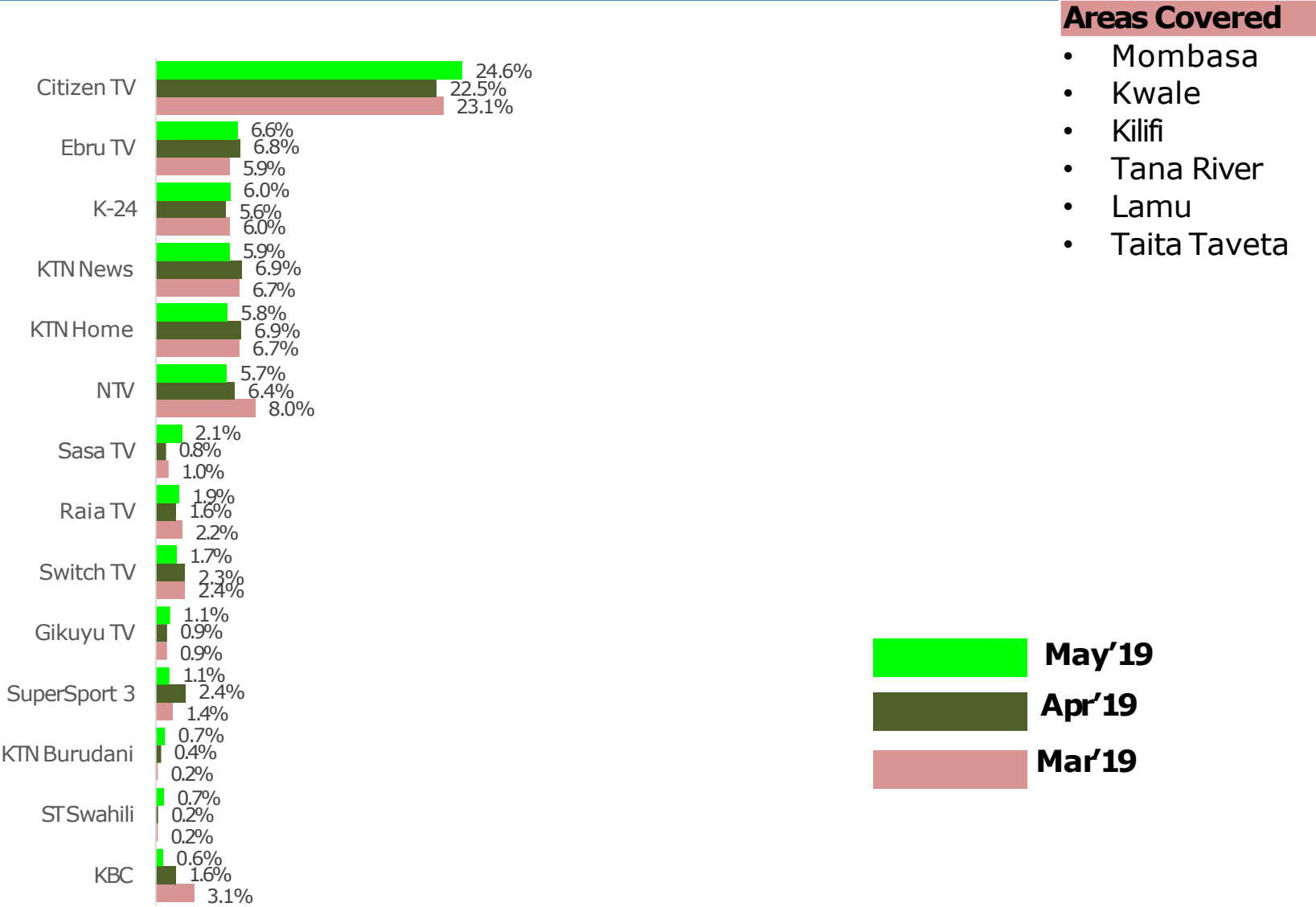
- Kitui
- Machakos
- Makueni



Base=1.6M Past 7 Day Media Consumers in Lower Eastern
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

Average Daily TV Reach –Coast



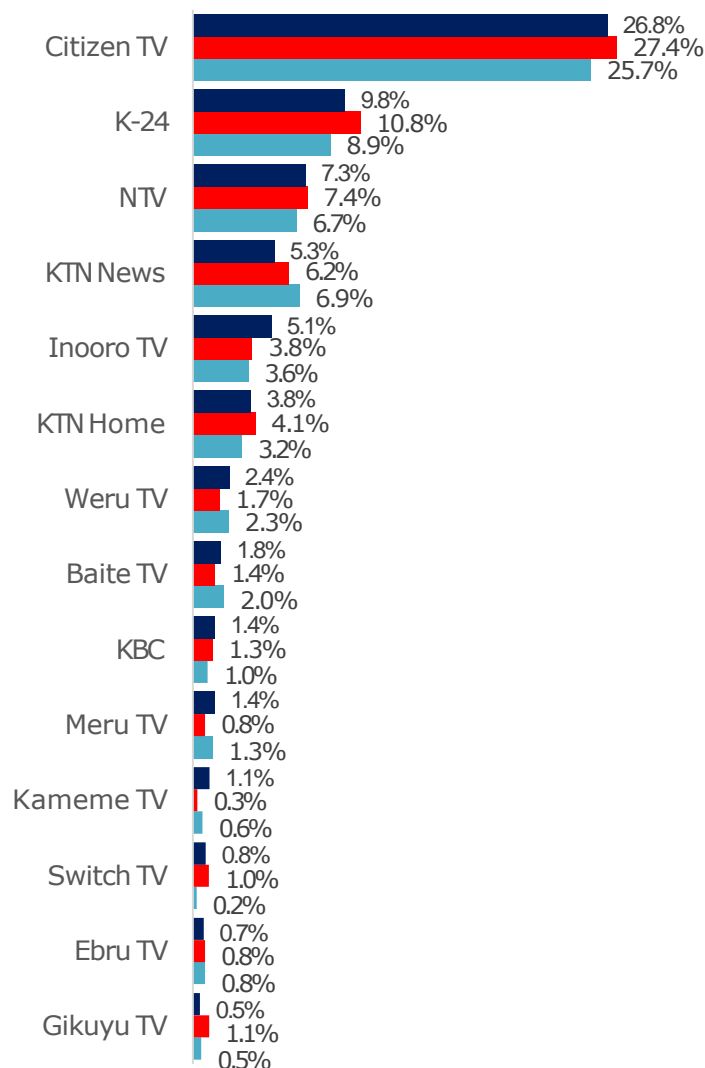
Base=1.4M Past 7 Day Media Consumers in Coast
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

Average Daily TV Reach –Upper Eastern

Areas Covered

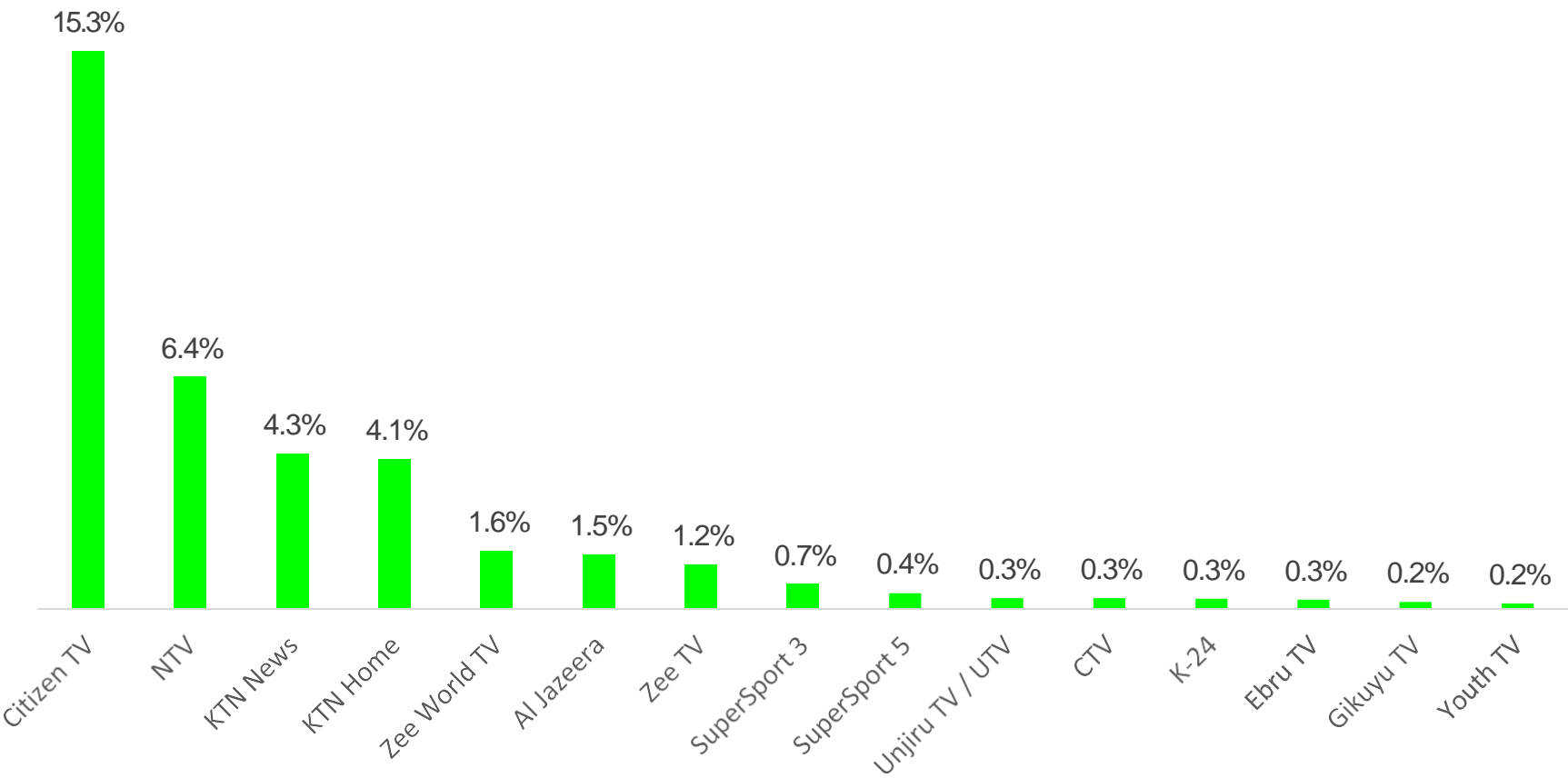
- Isiolo
- Meru
- Tharaka



Base=901,009 Past 7 Day Media Consumers in Upper Eastern
 Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

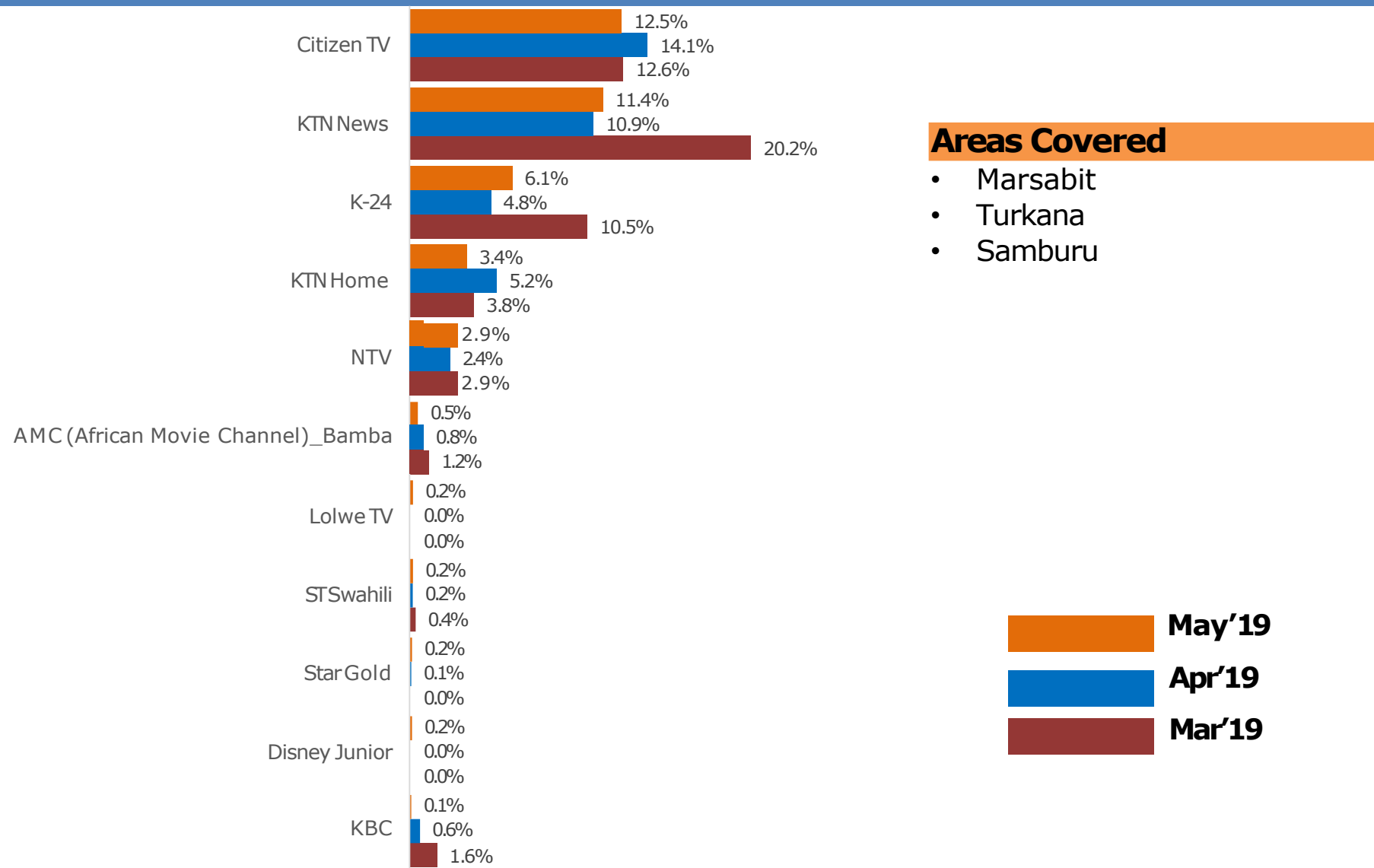
Average Daily TV Reach –North Eastern



Base=1.0M Past 7 Day Media Consumers in North Eastern
Source: KARF Tracker May'19

By KARF For RMS Internal Use

Average Daily TV Reach –North Western



Base=317,455 Past 7 Day Media Consumers in North Western
Source: KARF Tracker March –May'19

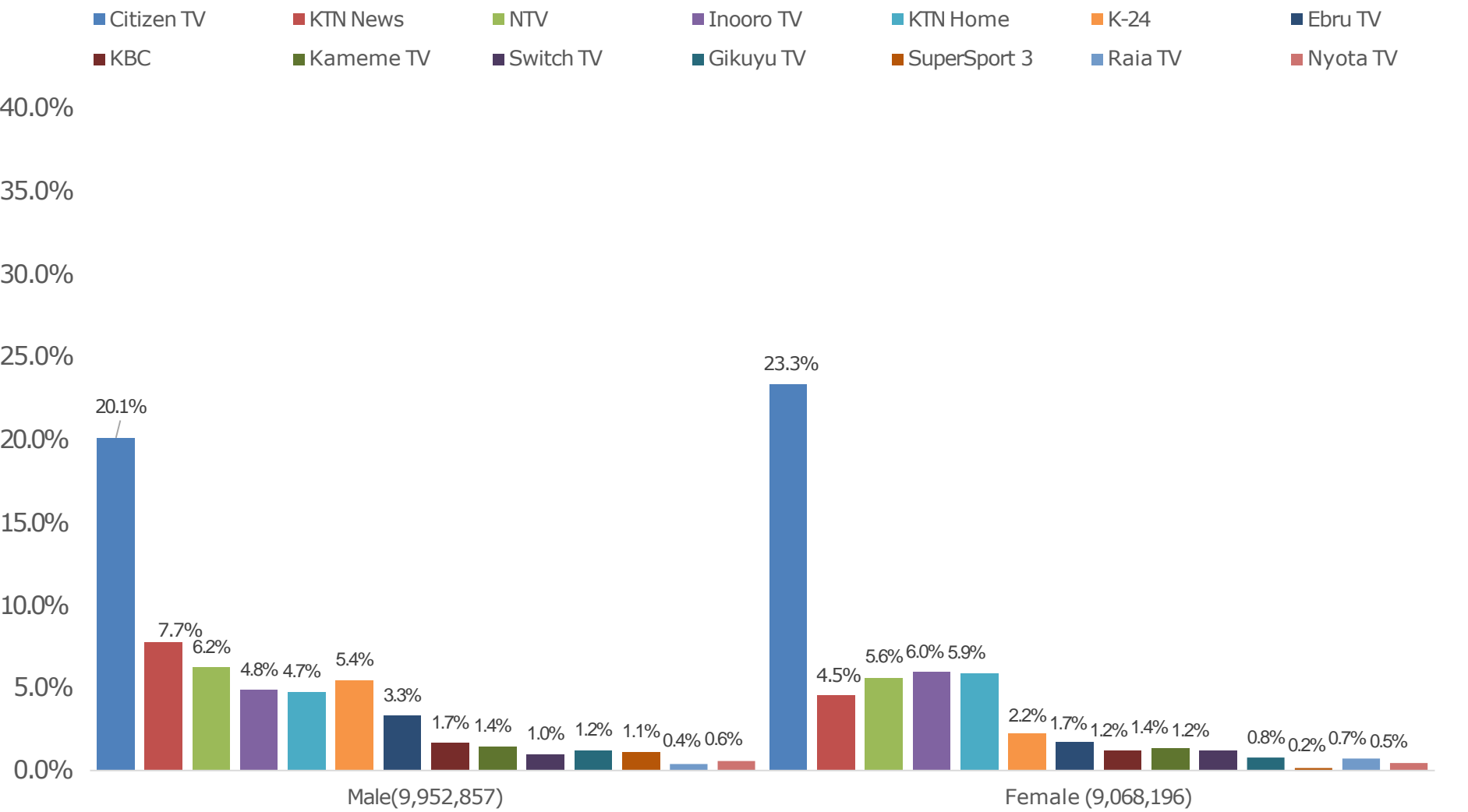
By KARF For RMS Internal Use

AVERAGE DAILY TV REACH BY DEMOGRAPHIC

By KARF For RMS Internal Use

KARF
The Kenya Audience Research Foundation

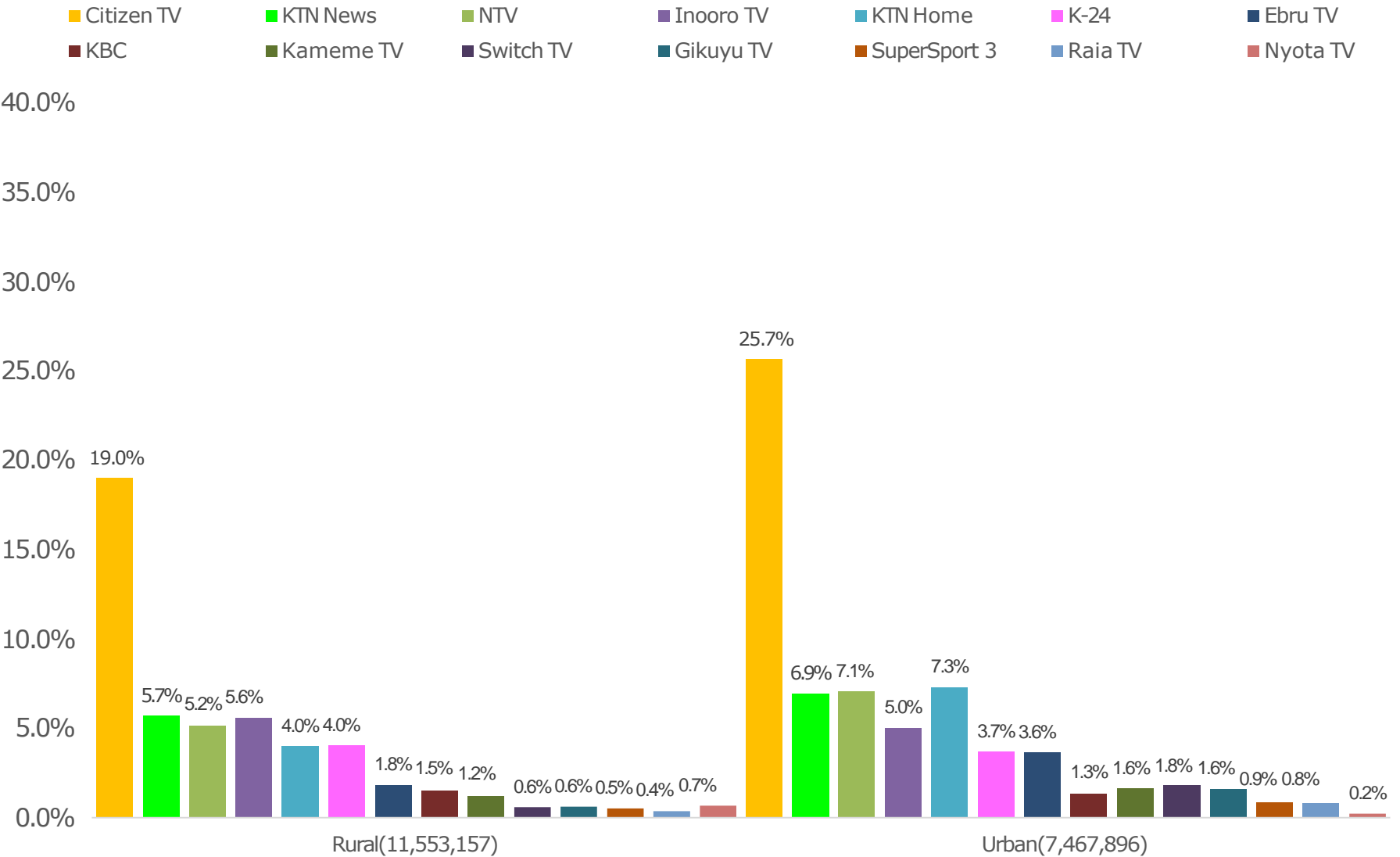
Average Daily TV Reach – by Gender



Base=19.0M Past 7 Day Media Consumers
Source: KARF Tracker May 2019

By KARF For RMS Internal Use

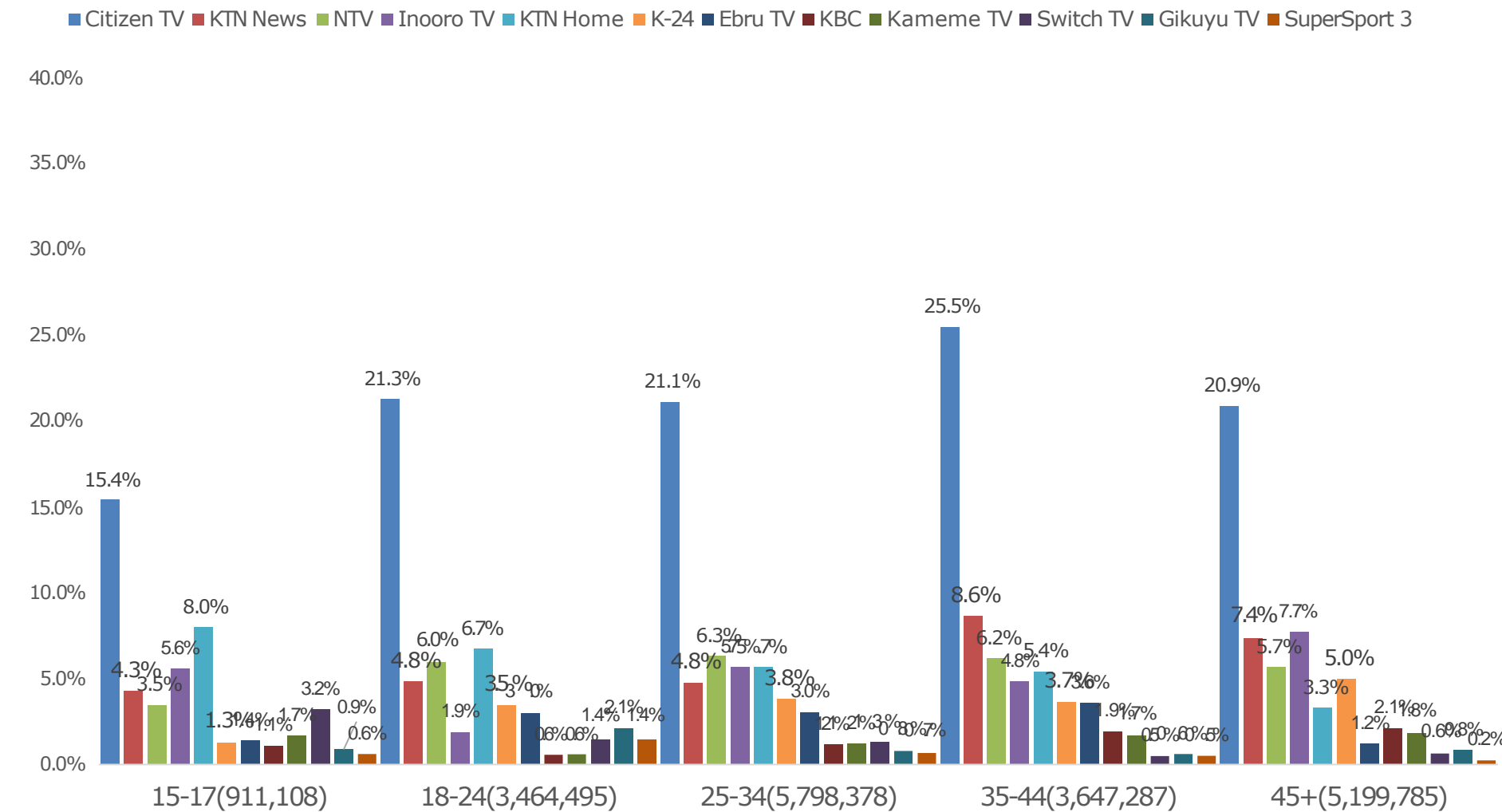
Average Daily TV Reach – by Setting



Base=19.0M Past 7 Day Media Consumers
Source: KARF Tracker May 2019

By KARF For RMS Internal Use

Average Daily TV Reach – by Age Segment

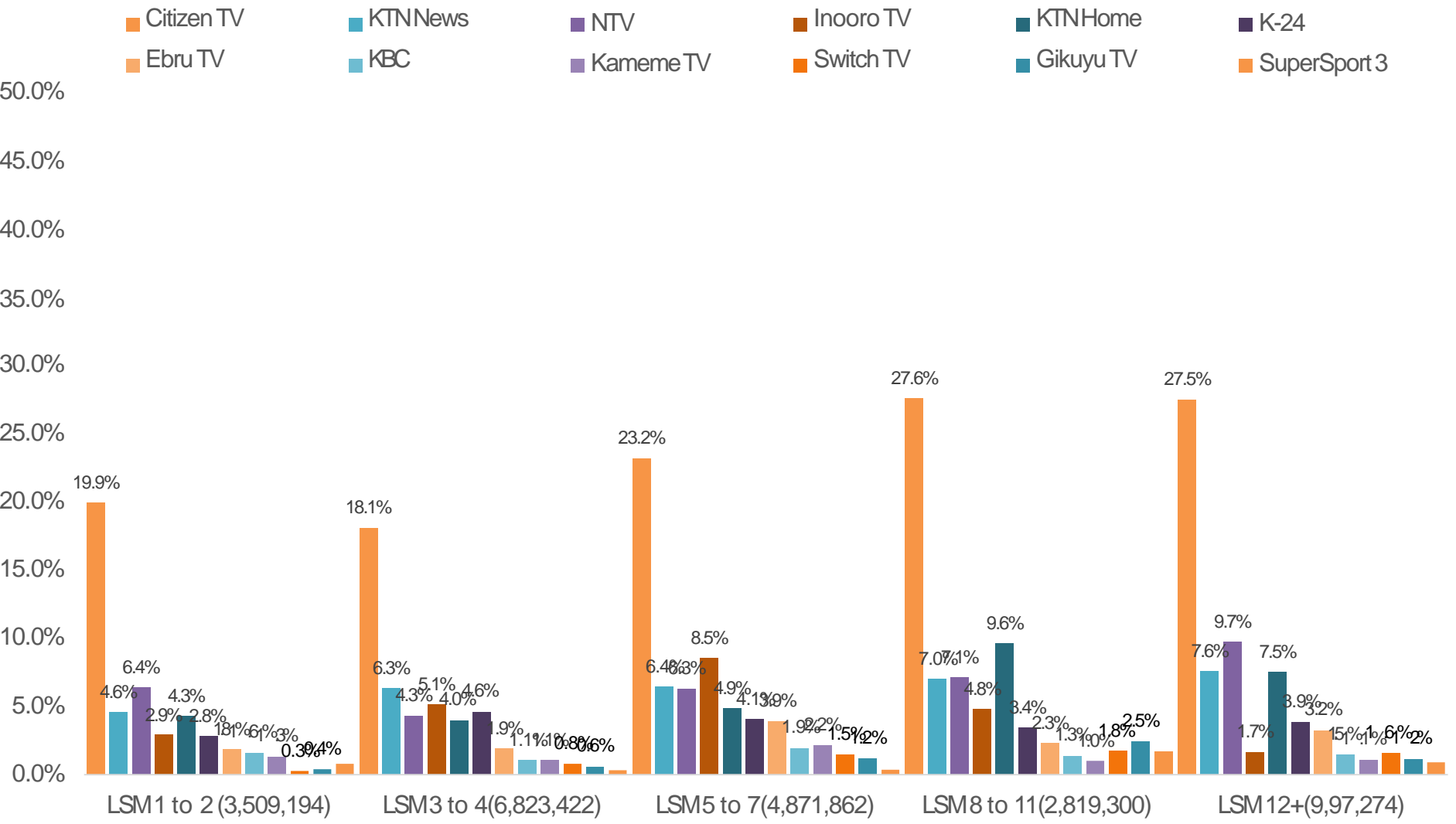


Base=19.0M Past 7 Day Media Consumers
Source: KARF Tracker April 2019

By KARF For RMS Internal Use



Average Daily TV Reach – by LSM



Base=19.0M Past 7 Day Media Consumers
Source: KARF Tracker April 2019

By KARF For RMS Internal Use

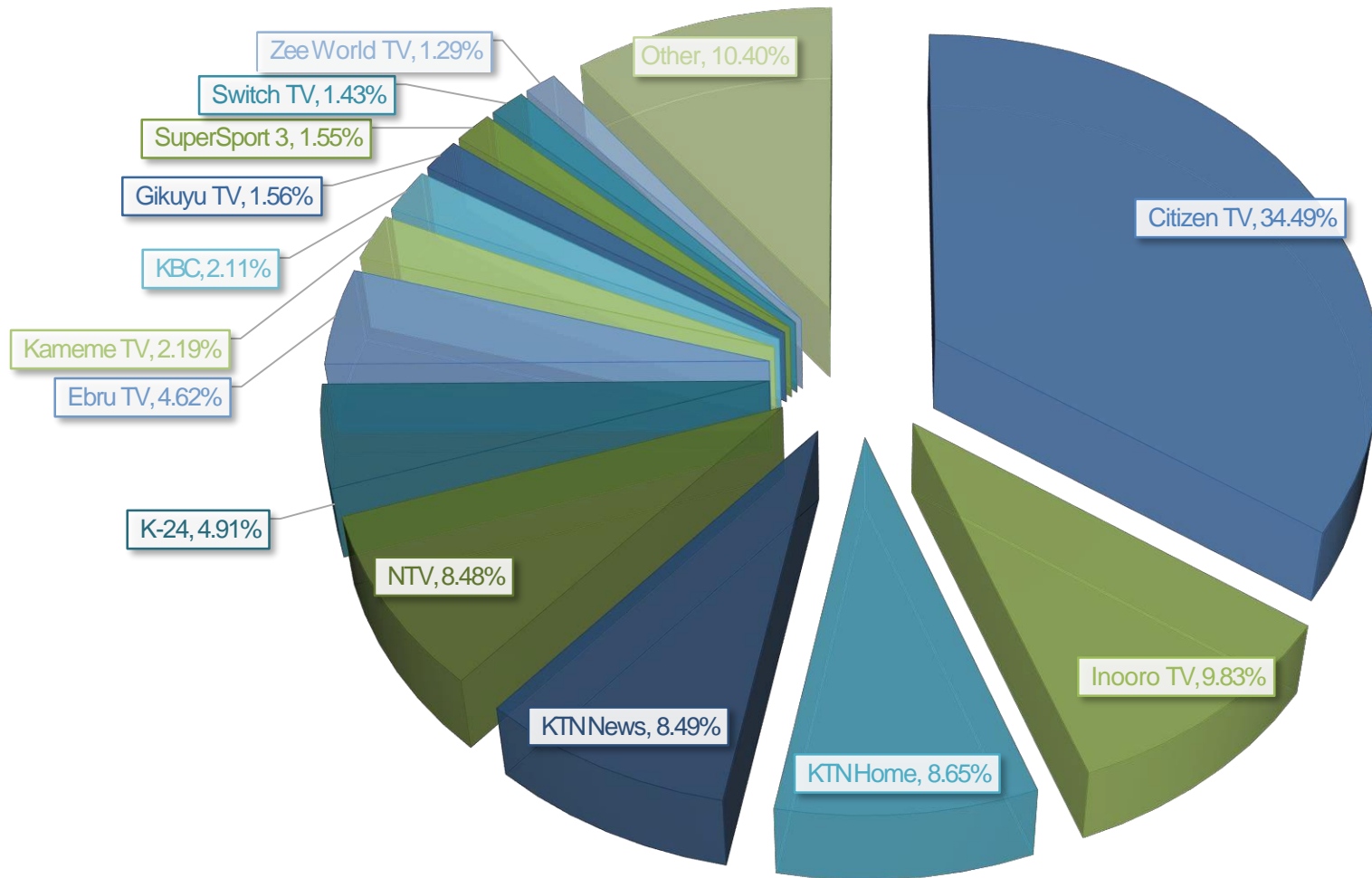
TV CHANNEL AUDIENCE

SHARE

- ❑ **Share** : The percentage/proportion of the total viewing or listening audience watching over a given period of time. It is computed by taking the total time spent on all stations and then determining the % share of a station. It is a important indicator in determining the station which engages the viewers or listeners longer.

Television National Media Market Share – May'19

*Share based on time spent(1,331,114,869) Minutes in May,2019



Base=9.7M Average Daily TVViewers
Source: KARF Tracker May,2019

RADIO AUDIENC

E SIZE BY STATION

TV Channel	March'2019	April'2019	May'2019
Citizen TV	4,046,936	4,016,826	4,114,062
KTN News	1,248,790	1,222,320	1,179,596
NTV	1,189,500	1,124,921	1,123,893
Inooro TV	953,381	955,703	1,021,404
KTN Home	1,005,514	1,084,608	1,004,754
K-24	735,809	734,756	744,415
Ebru TV	537,046	535,859	483,652
KBC	335,267	275,593	275,340
Kameme TV	234,282	240,922	262,304
Switch TV	201,058	235,007	204,515
Gikuyu TV	214,013	226,134	191,919
SuperSport 3	134,755	186,712	124,695
Raia TV	97,021	109,937	104,175
Nyota TV	144,496	122,812	97,004
Zee World TV	56,021	60,019	91,166
Maisha Magic East	69,001	66,775	75,162
Sasa TV	29,297	20,385	43,467
Kwese Free Sports/KFS	31,118	28,010	21,236

Base=19.0M Past 7 Day Media Consumers
Source: KARF Tracker March –May'19

By KARF for RMS Internal Use



RADIO SECTION

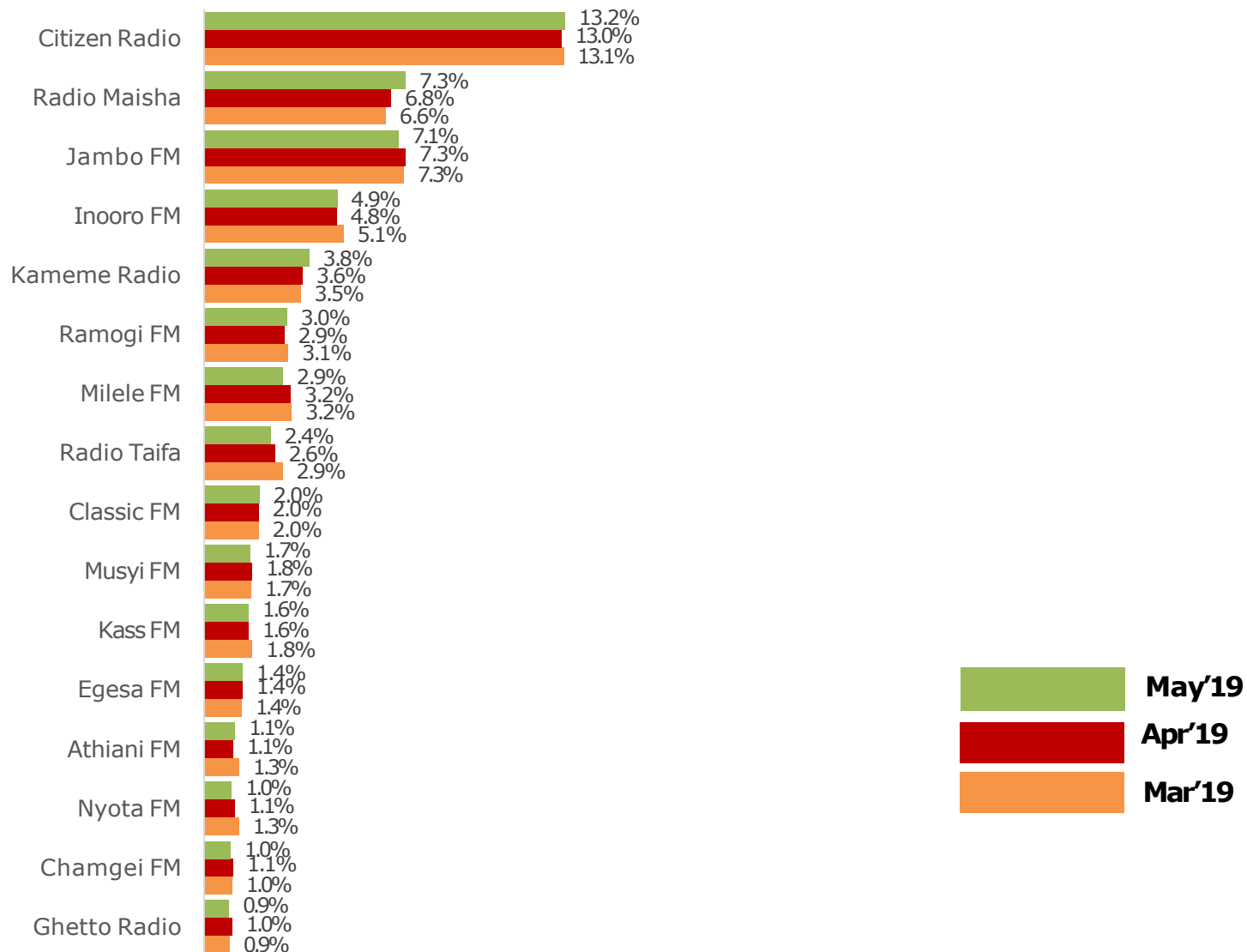
By KARF for RMS Internal Use

AVERAGE DAILY RADIO REACH

Reach : The proportion of the population/respondents that tuned in to a particular station for at least 5 minutes in a 30 minutes block, it shows the station/channel with highest/lowest incidence of viewership

By KARF For RMS Internal Use

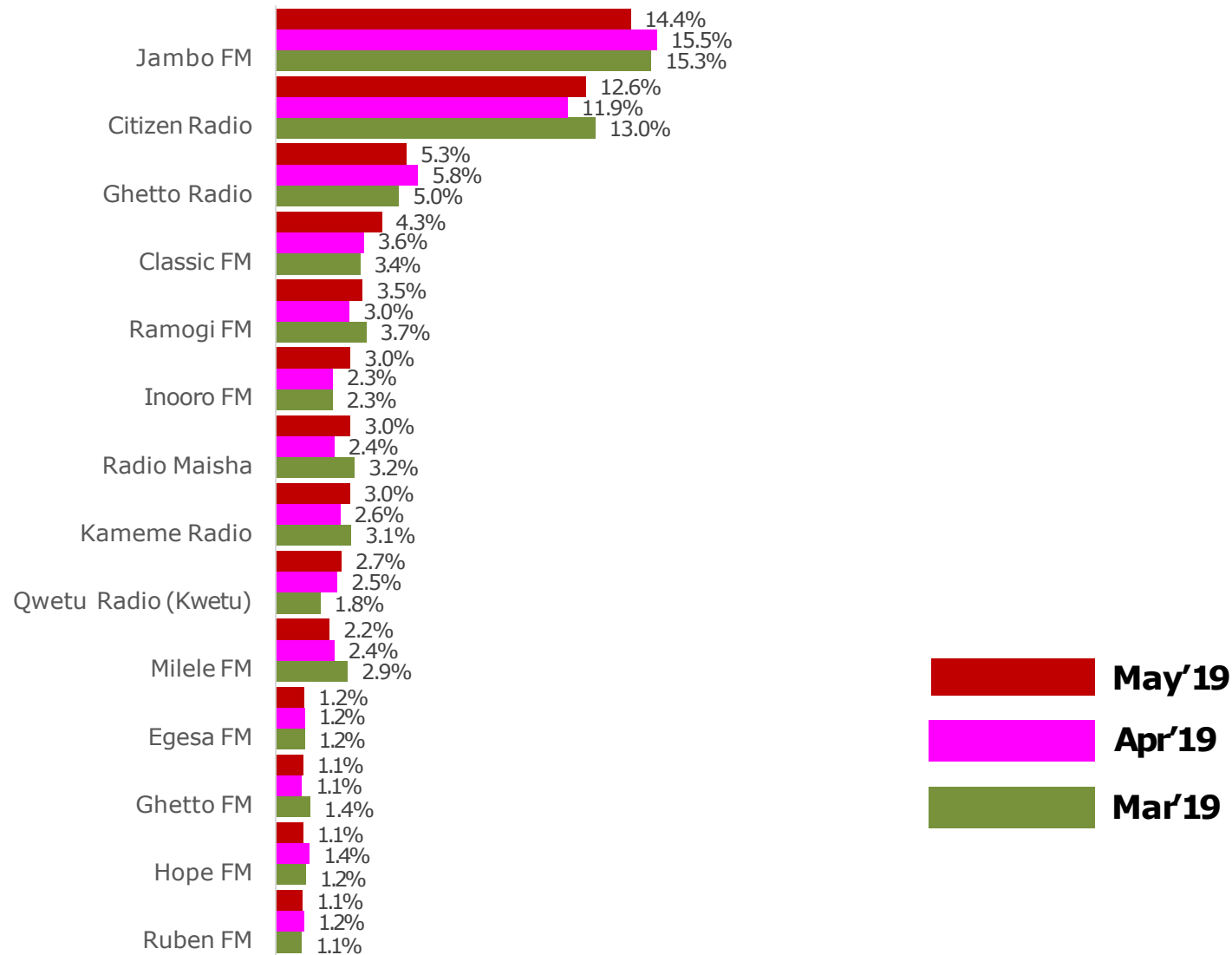
Average Daily Radio Reach - National



Base=19M Past 7 Day Media Consumers
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

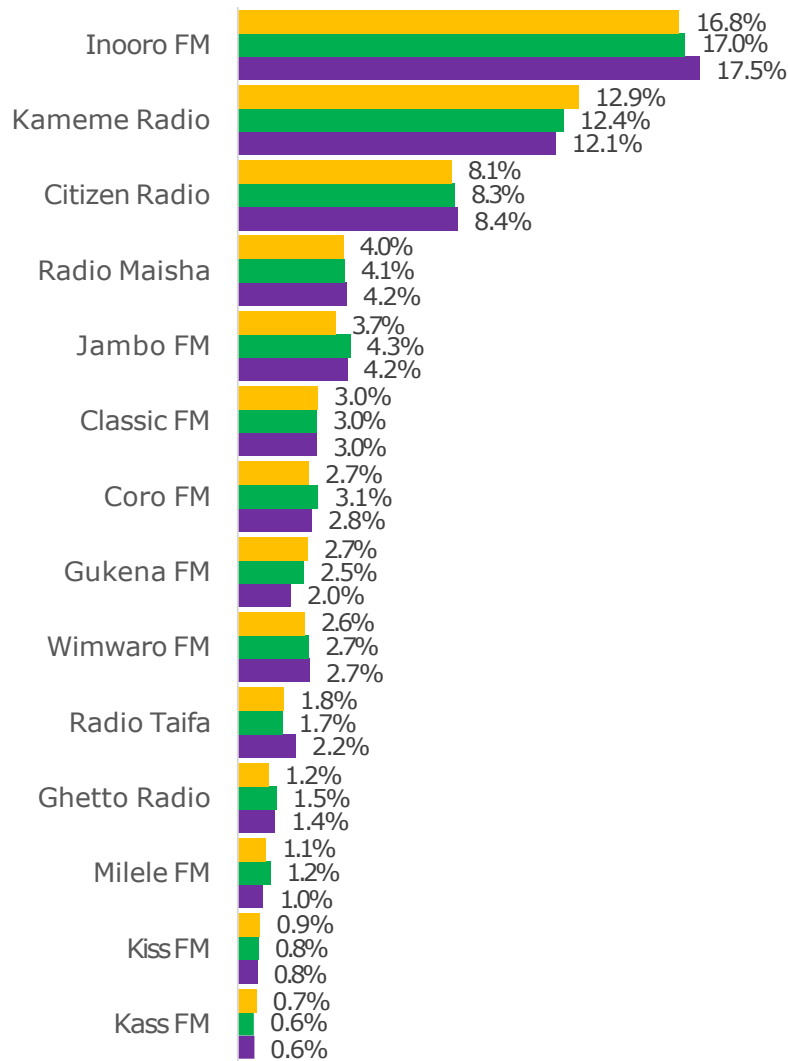
Average Daily Radio Reach - Nairobi



Base=2.1M Past 7 Days Media Consumers in Nairobi
Source: KARF Tracker March -May'19

By KARF For RMS Internal Use

Average Daily Radio Reach - Central



Areas Covered

- Nyandarua
- Nyeri
- Kirinyaga
- Muranga
- Kiambu
- Embu
- Laikipia
- Nakuru
- Kajiado

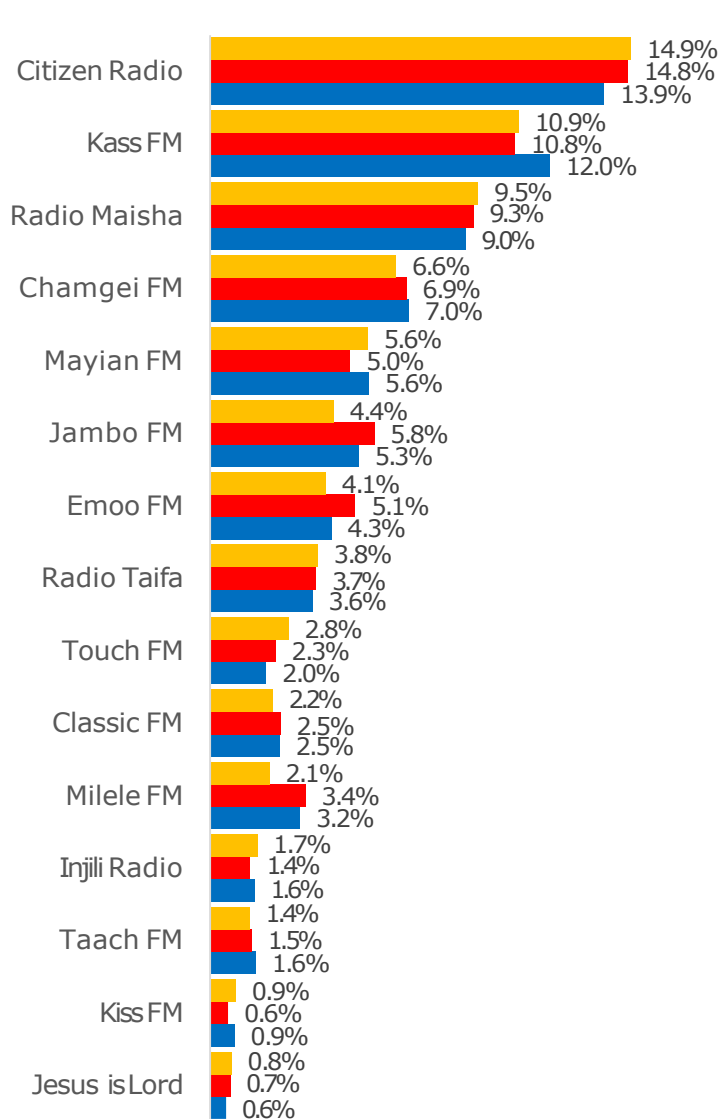


Base=4.6M Past 7 Day Media Consumers in Central

Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

Average Daily Radio Reach - Rift



- Areas Covered**
- Baringo
 - Uasin Gishu
 - Elgeyo Marakwet
 - Nandi
 - Narok
 - Kericho
 - Bomet

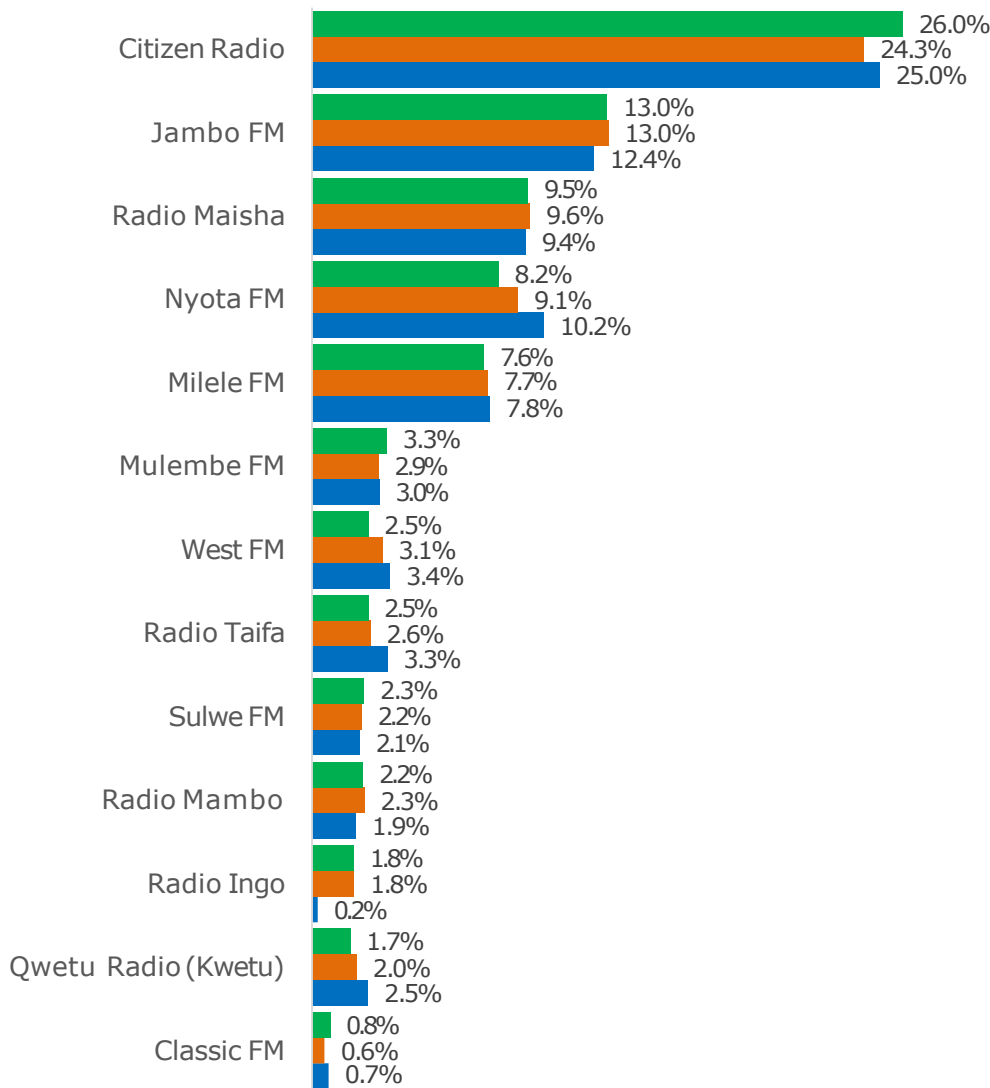


Base=2.4M Past 7 Day Media Consumers in Rift
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

Average Daily Radio Reach - Western

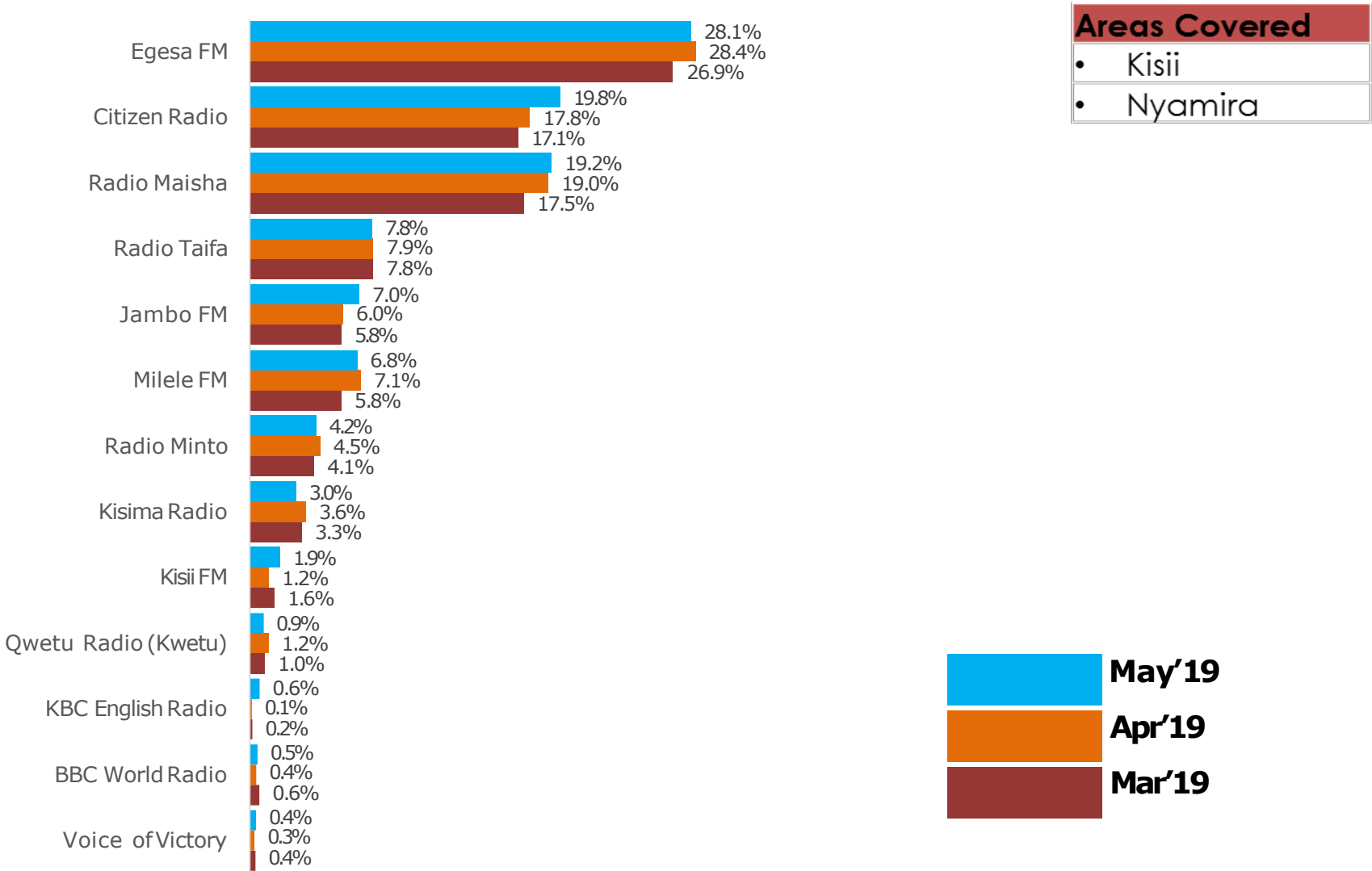
- Areas Covered
- West Pokot
 - Trans-Nzoia
 - Kakamega
 - Vihiga
 - Bungoma
 - Busia



Base=2.3M Past 7 Day Media Consumers in Western
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

Average Daily Radio Reach - South Nyanza



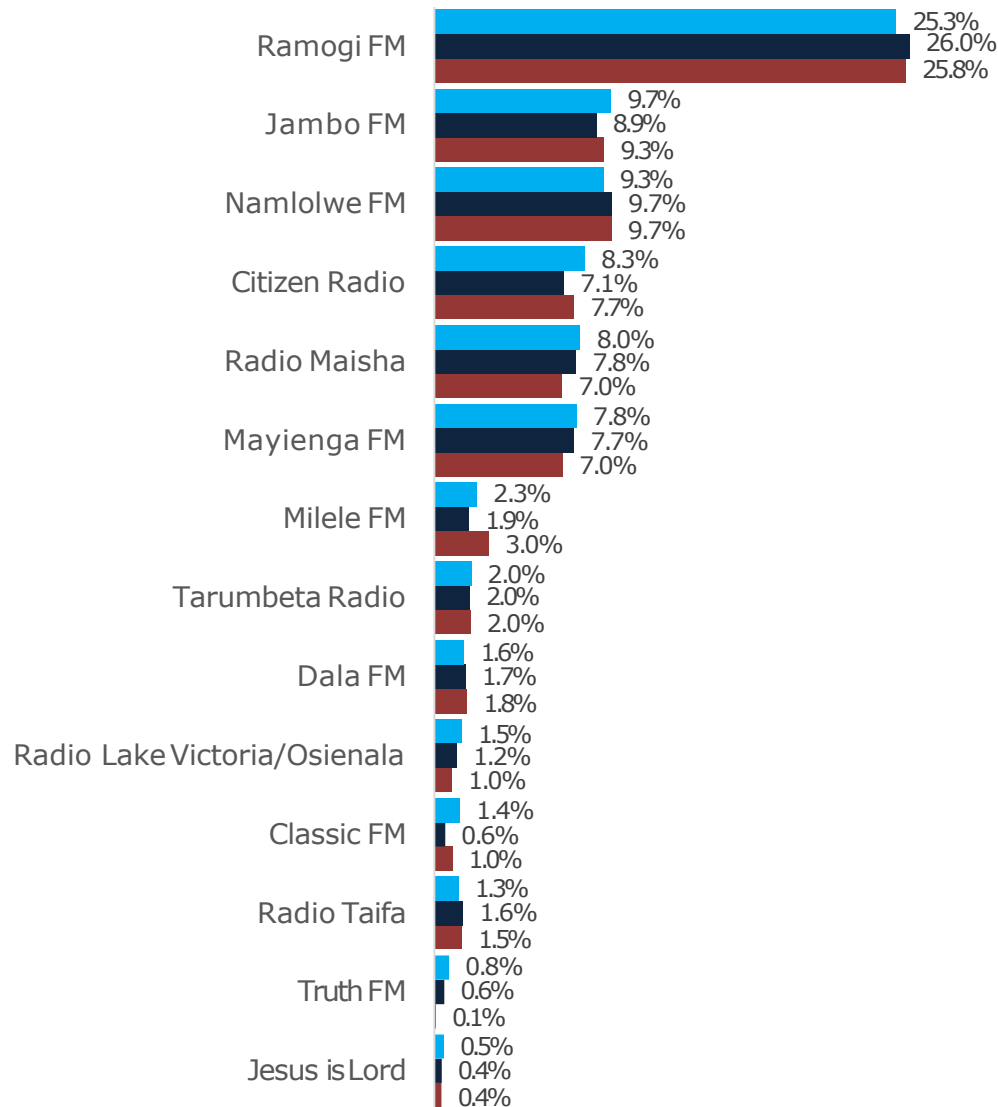
Base=749,604 Past 7 Day Media Consumers in South Nyanza
Source: KARF Tracker March – May'19

By KARF For RMS Internal Use

Average Daily Radio Reach - Lake

Areas Covered

- Siaya
- Kisumu
- Migori
- Homa Bay



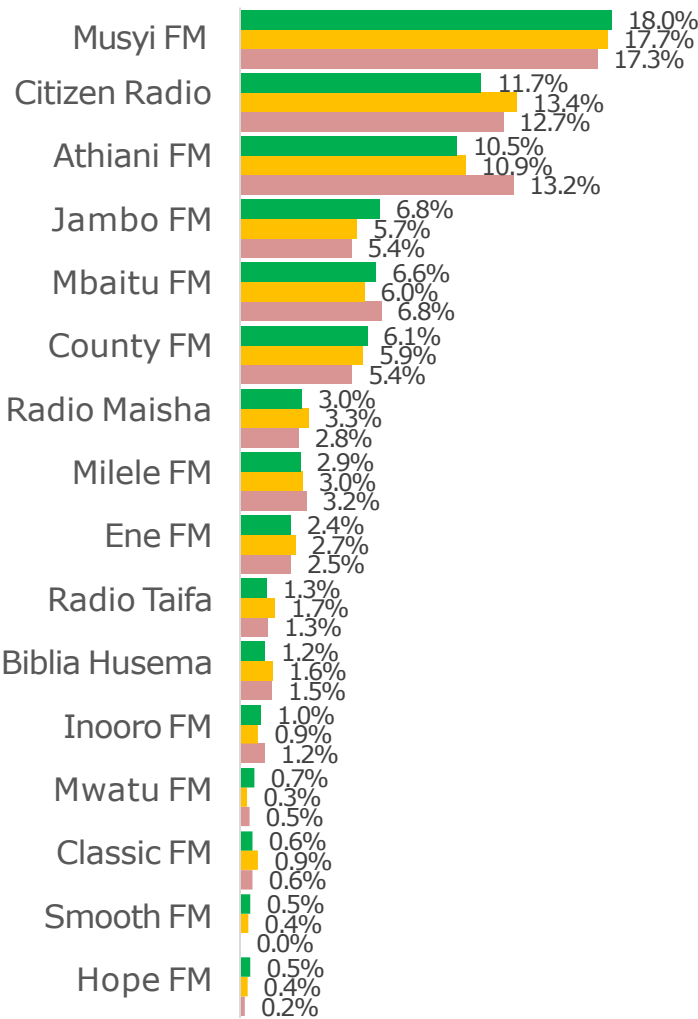
Base=1.6M Past 7 Day Media Consumers in Lake
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

Average Daily Radio Reach - Lower Eastern

Areas Covered

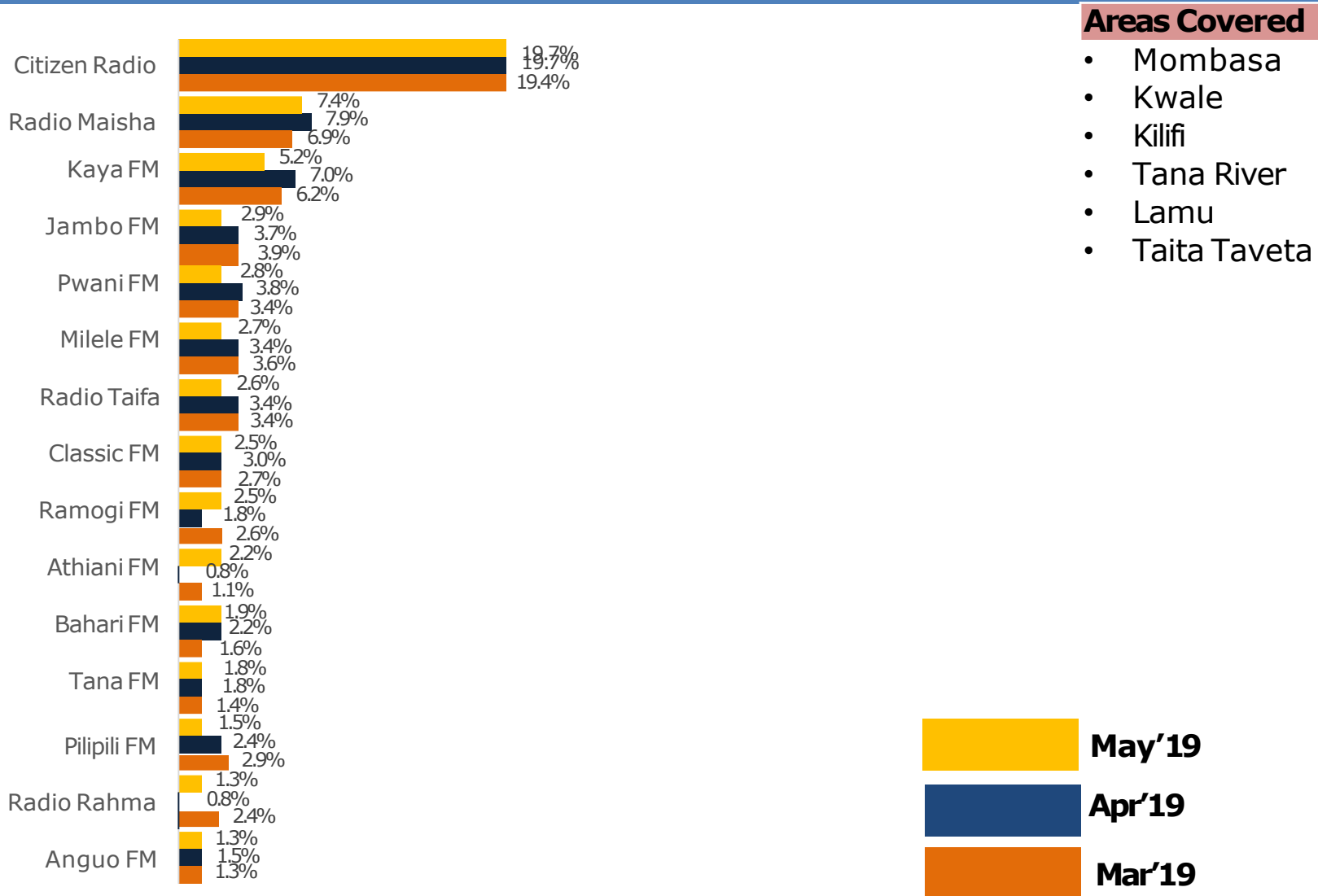
- Kitui
- Machakos
- Makueni



Base=1.6M Past 7 Day Media Consumers in Lower Eastern
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

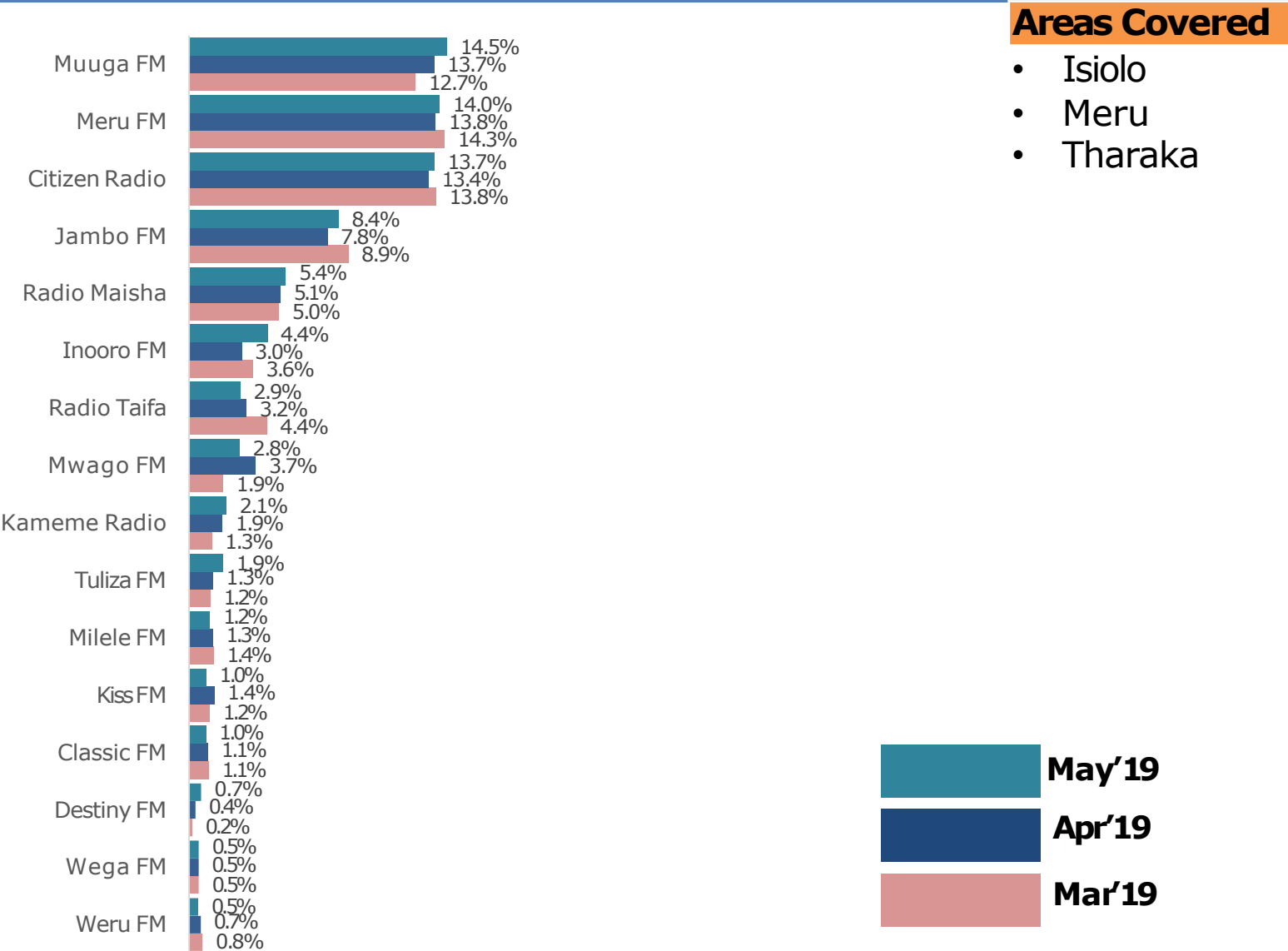
Average Daily Radio Reach - Coast



Base=1.4M Past 7 Day Media Consumers in Coast
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

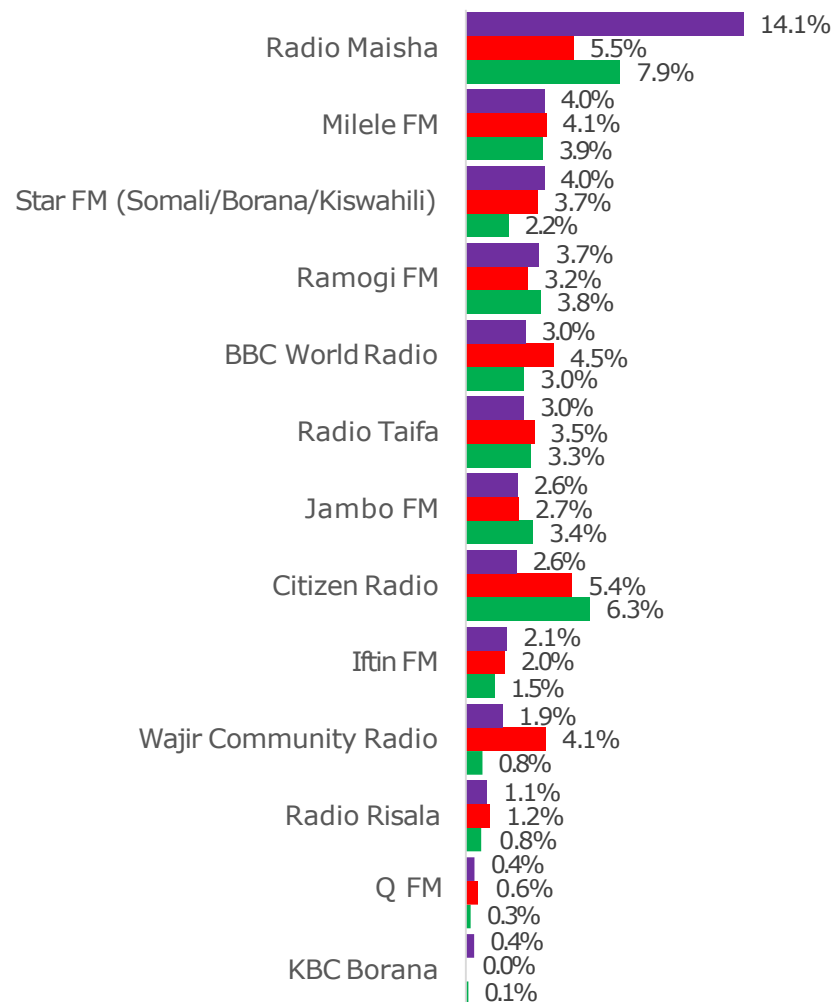
Average Daily Radio Reach - Upper Eastern



Base=901,009 Past 7 Day Media Consumers in Upper Eastern
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

Average Daily Radio Reach - North Eastern



Areas Covered

- Garissa
- Wajir
- Mandera



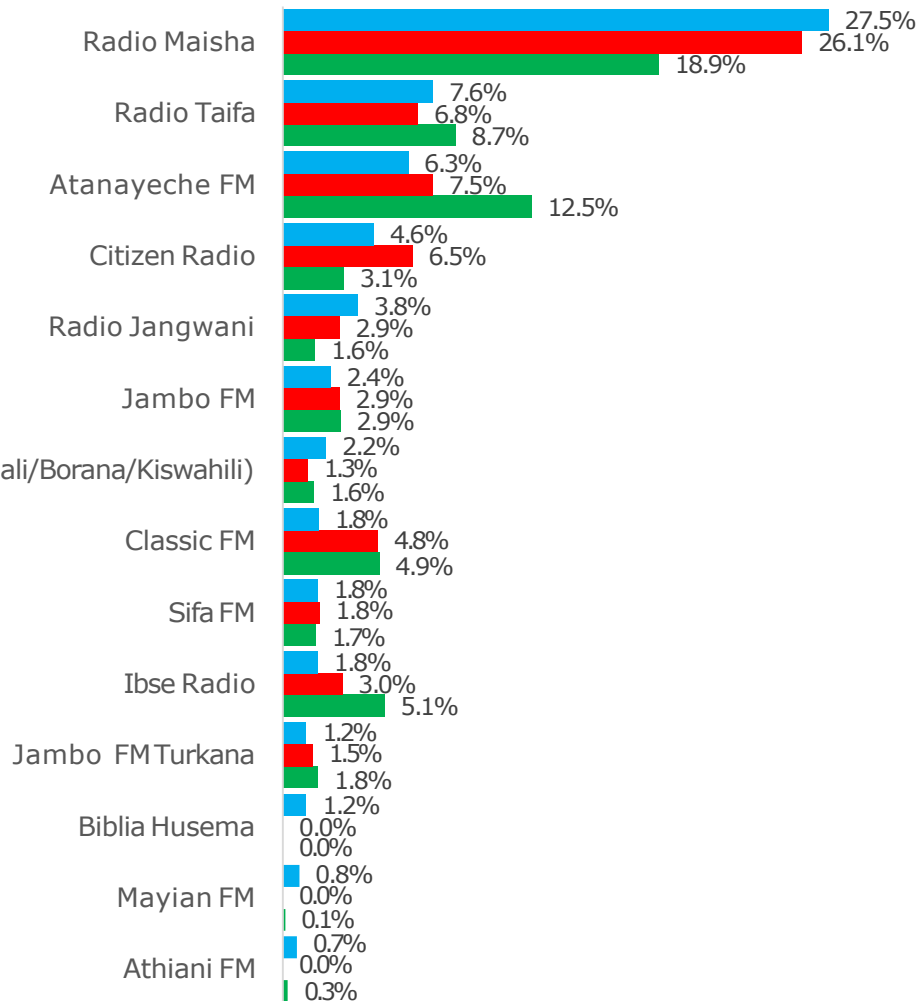
Base=1.0M Past 7 Day Media Consumers in North Eastern
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

Average Daily Radio Reach - North Western

Areas Covered

- Marsabit
- Turkana
- Samburu



Base=317,455 Past 7 Day Media Consumers in North Western
Source: KARF Tracker March – May'19

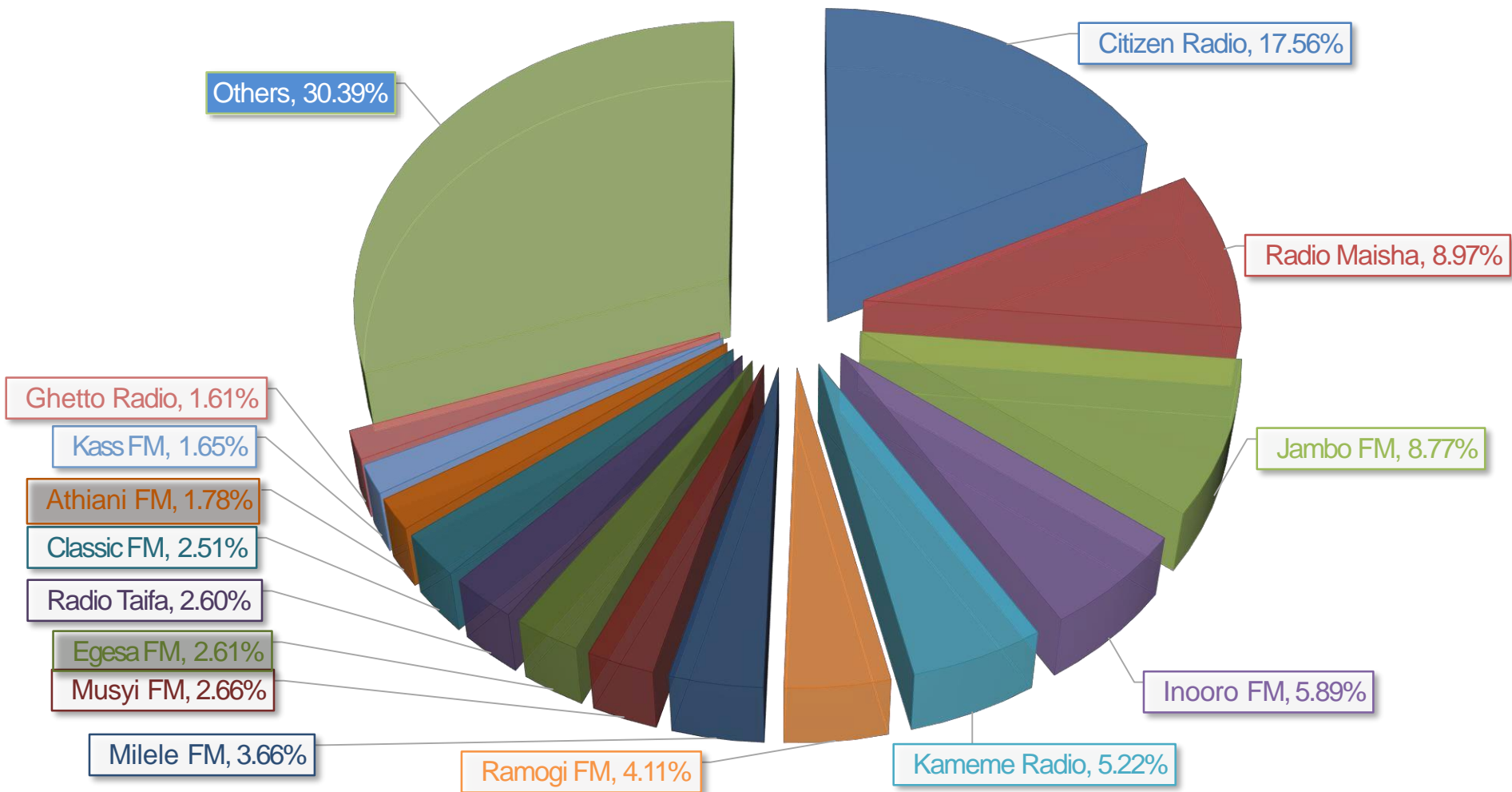
By KARF For RMS Internal Use

RADIO STATION AUDIENCE SHARE

- ❑ **Share** : The percentage/proportion of the total viewing or listening audience watching over a given period of time. It is computed by taking the total time spent on all stations and then determining the % share of a station. It is a important indicator in determining the station which engages the viewers or listeners longer.

Radio National Market Share – May'19

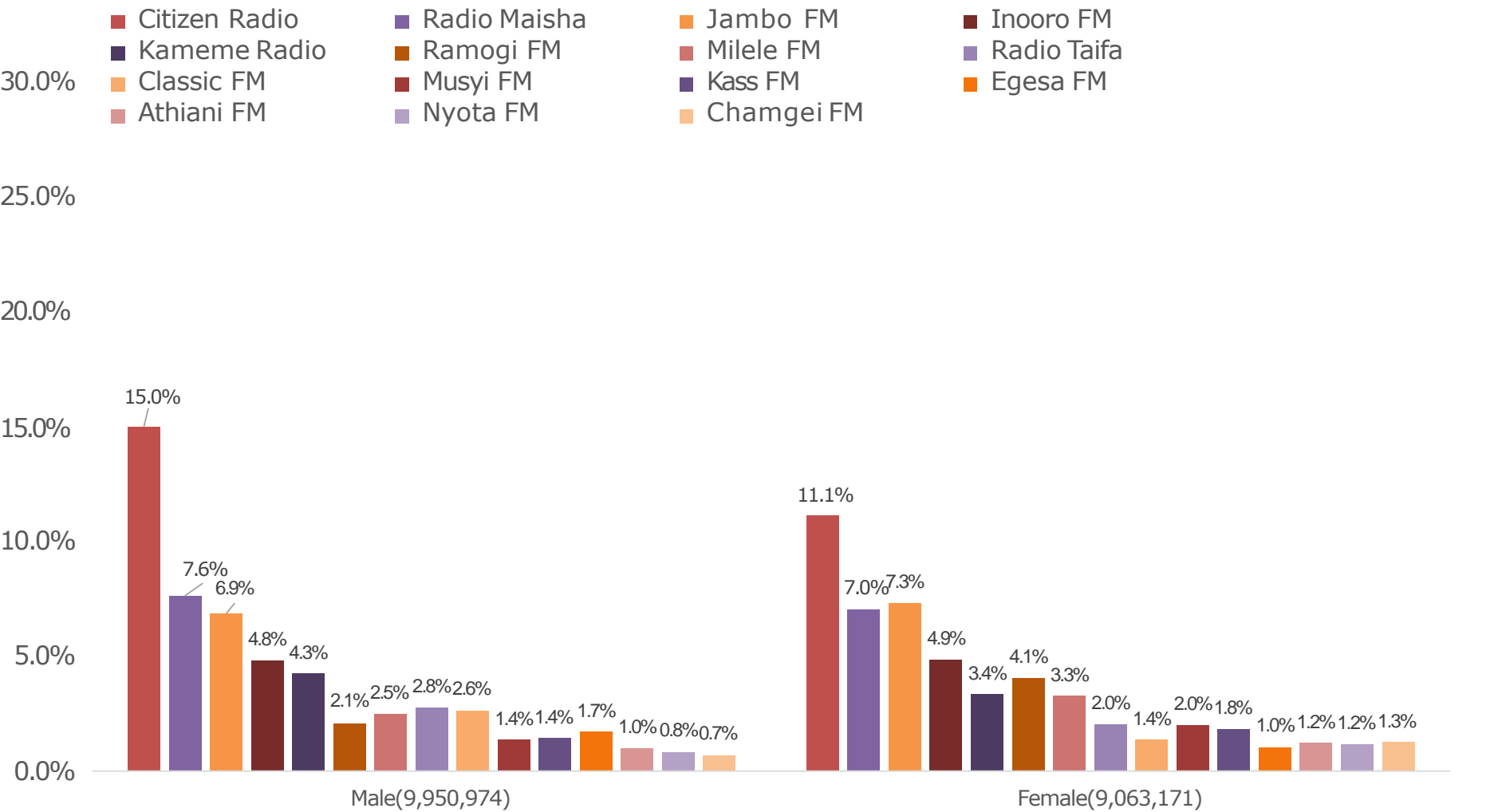
* Share based on time spent **(2,143,026,699)** total Minutes spent on Radio listenership in the month of May, 2019.



Base=12.5M average daily Radio Listeners
Source: KARF Tracker May, 2019

By KARF For RMS Internal Use

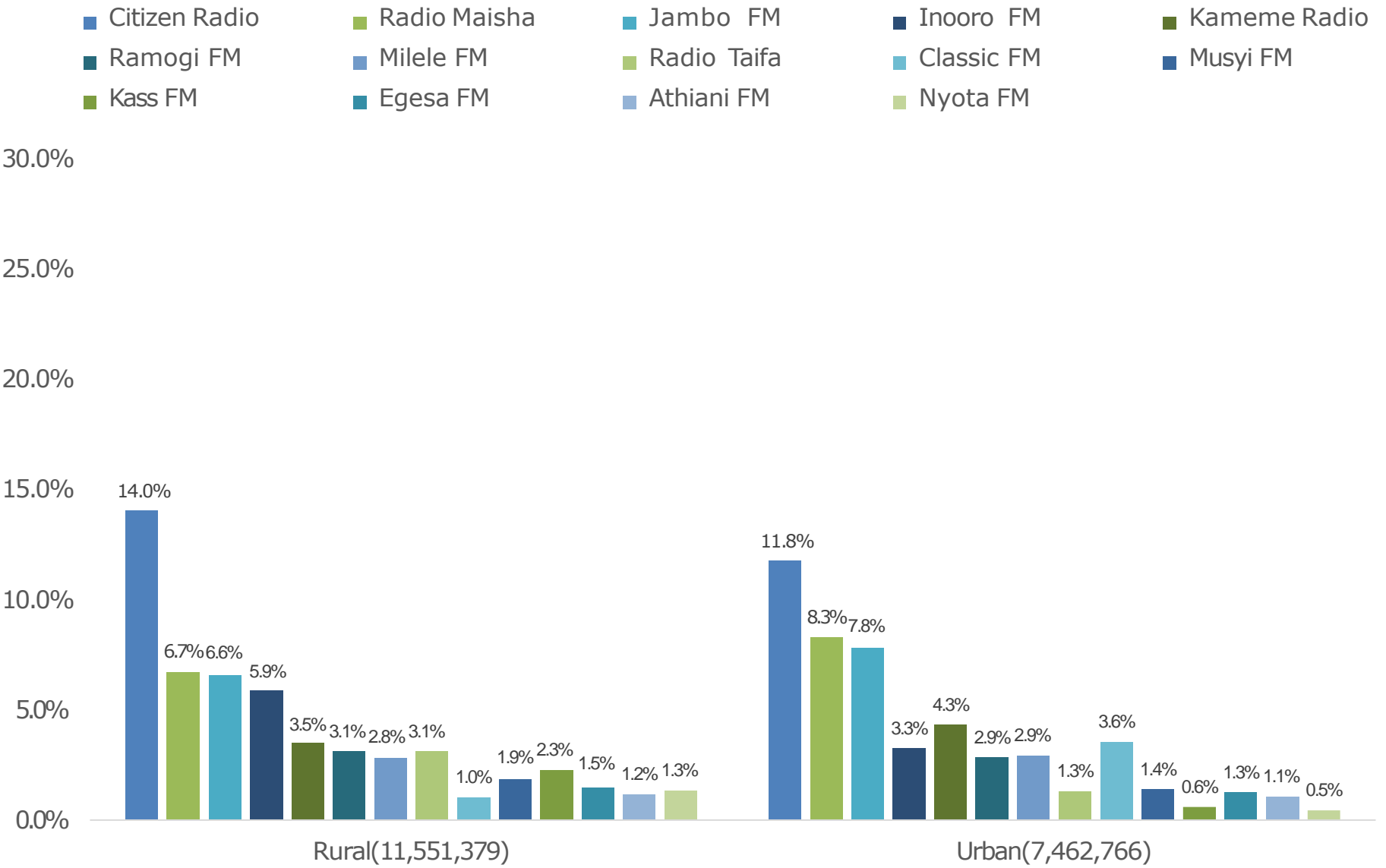
Average Daily Radio Reach – by Gender



Base=19M Past 7 Day Media Consumers
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

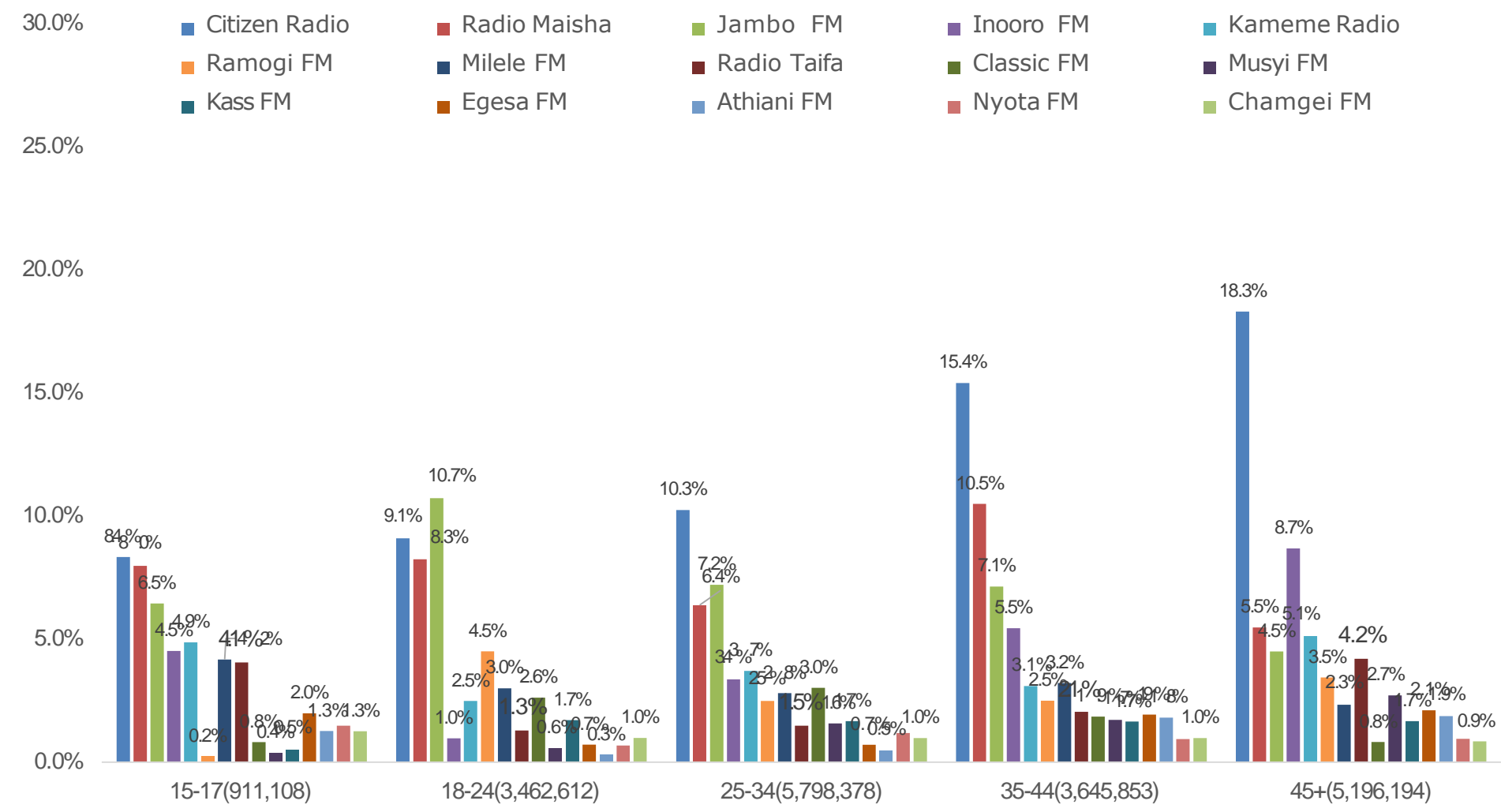
Average Daily Radio Reach – by Setting



Base=19M Past 7 Day Media Consumers
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

Average Daily Radio Reach – by Age Segment

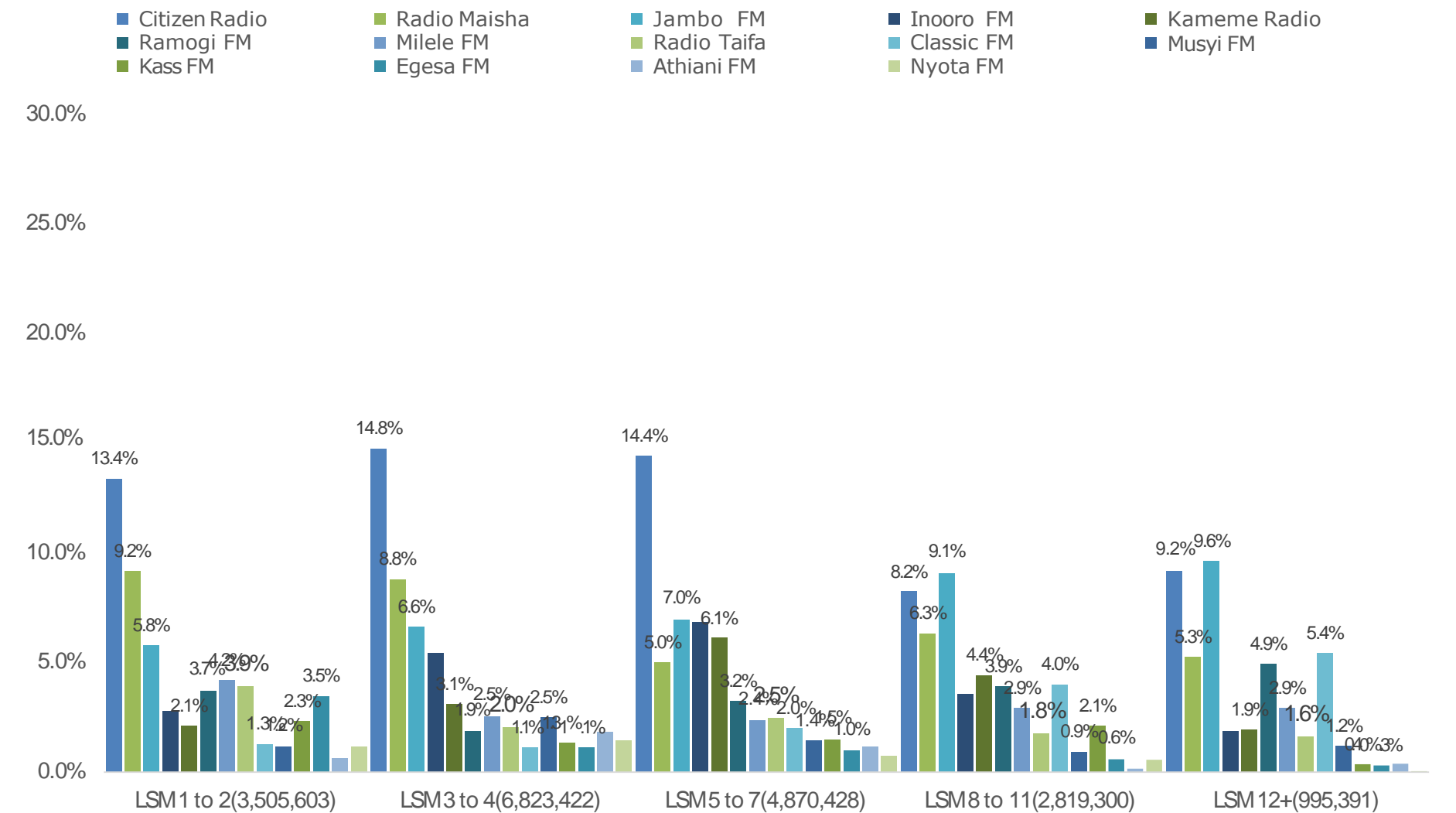


Base=19M Past 7 Day Media Consumers
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use



Average Daily Radio Reach – by LSM



Base=19M Past 7 Day Media Consumers
Source: KARF Tracker March –May'19

By KARF For RMS Internal Use

Radio Audience Size by Station			
Radio Station	March'2019	Apr'2019	May'2019
Citizen Radio	2,492,109	2,477,186	2,501,365
Jambo FM	1,381,912	1,396,397	1,344,797
Radio Maisha	1,260,133	1,296,033	1,396,663
Inooro FM	964,908	918,884	921,922
Kameme Radio	667,049	680,935	726,294
Milele FM	607,217	598,239	544,958
Ramogi FM	581,697	556,058	573,397
Radio Taifa	541,398	489,493	461,160
Classic FM	377,082	376,937	384,809
Musyi FM	325,619	333,235	318,131
Kass FM	332,794	307,889	307,875
Egesa FM	259,465	264,293	264,929
Nyota FM	239,487	210,461	189,472
Chamgei FM	193,971	202,366	183,220
Athiani FM	242,500	198,962	213,008
Ghetto Radio	175,526	194,334	171,243
Coro FM	145,994	166,729	146,032
Namlolwe FM	167,336	163,813	157,218
Meru FM	160,088	149,145	154,087
Qwetu Radio (Kwetu)	135,779	142,311	124,806
County FM	122,276	129,155	117,168
Base=19.0M Past 7 Day Media Consumers Source: KARF Tracker March –May 2019			
By KARF for RMS Internal Use			

OUR CONTACTS

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