Kenya Audience Research Foundation:

Media Establishment Survey - 2015

(Refreshed Audience Measurement System & Living Standards Measurement)
# 2015 Media Establishment Survey

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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

- 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**

1. **Data collection using tablets**
2. **Thorough testing of the data collection script before actual data collection**
3. **Intensive piloting and debriefing of the instrument & use of experienced field interviewers**
   - **Forensic analysis for Data Quality**
   - **Field accompaniments by the supervisors for all interviewers in the field**
     - **20% back-checks of each interviewer’s work** (10% through physical back-check & 10% through telephone back-check)
   - **Continuous field and quality control updates shared with KARF**
   - **GPS verification of physical back-checks and accompaniments by supervisors**
   - **Interviewer log in scripts for in-field monitoring**
Refreshing Living Standard Measurement (LSM)

Old LSM structure in Kenya

- LSM 1-3: 30%
- LSM 4-7: 11%
- LSM 8-10: 4%
- LSM 11-13: 3%
- LSM 14-17: 54%
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 !!!**

<table>
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<tr>
<th>Different TV types may be a differentiator</th>
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<tbody>
<tr>
<td>Pay TV has evolved from traditional DSTV which traditionally was a sign of affluence</td>
</tr>
<tr>
<td>Mobile phones are now the norm but smartphones may be more differentiating</td>
</tr>
<tr>
<td>While computers are still not a household norm, tablets have can potentially reclassify digital users</td>
</tr>
<tr>
<td>Fixed land line not relevant anymore</td>
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**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

<table>
<thead>
<tr>
<th>SUBSCRIBER CATEGORY</th>
<th>PRODUCT</th>
<th>COST Kshs</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertisers</td>
<td>Full Data Set (TV, Radio, Print and Internet)</td>
<td>450,000.00</td>
<td>National Coverage</td>
</tr>
<tr>
<td></td>
<td>Full Data Set (TV, Radio, Print and Internet)</td>
<td>200,000.00</td>
<td>Cost for each Topography (If buying for specific topographies)</td>
</tr>
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**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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