



# Passive Audience Measurement

Prepared by: TIFA Research Limited  
June 2019



# Back to the Basics



# Media Audience Research

□ A study of media consumers of **radio, television, print media and internet** for the purpose of reaching the **optimal consumer audience**.



□ Media audience provide critical information for:

- **Advertisers** needing to target their messages
- **Media owners pricing** their advertising inventory
- **Ad agencies** that plan and buy media on behalf of advertisers.



# Audience Research in Africa



	Kenya	Uganda	Tanzania	Nigeria	South-Africa
Methodology	DAR	DAR	DAR	Diaries	Diaries/People Meters
Frequency	Monthly	Quarterly	Quarterly	Monthly	Radio- Quarterly TV – Daily
Coverage	National	Main cities	Main cities	18 urban areas	National
Last survey release date	May 2019	Quarter 4 2017	May 2018	July 2018	Up-to-date with relevant release

Kenya is ahead of the East Africa in terms of frequency of surveys and geographical coverage

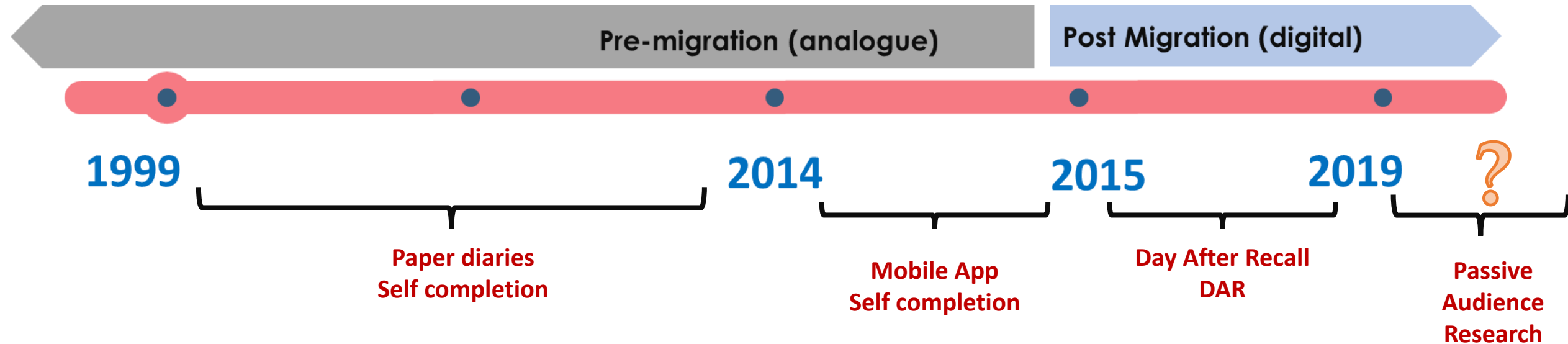
**Notes:**

- ❑ DAR: Day After Recall
- ❑ Dairies: 7 days paper dairies



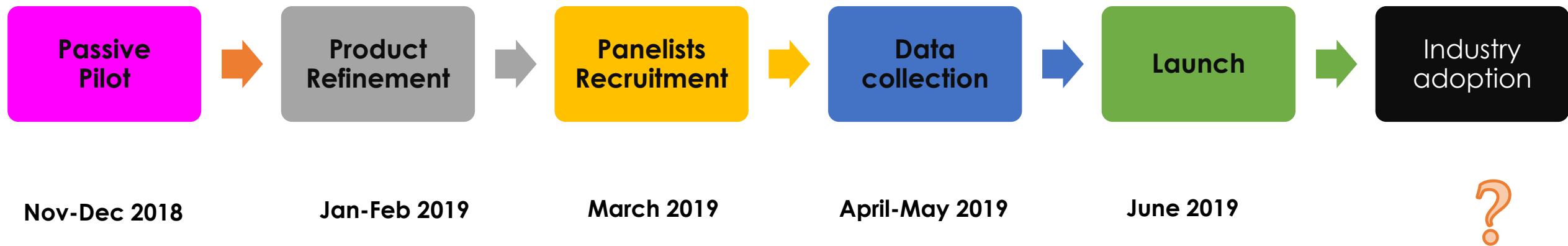
# Historical Perspective: Audience Research Methodology

- ❑ Audience research in Kenya has undergone a transformation from self-completion paper diaries to the day after recall.
- ❑ Future of audience research is the PASSIVE



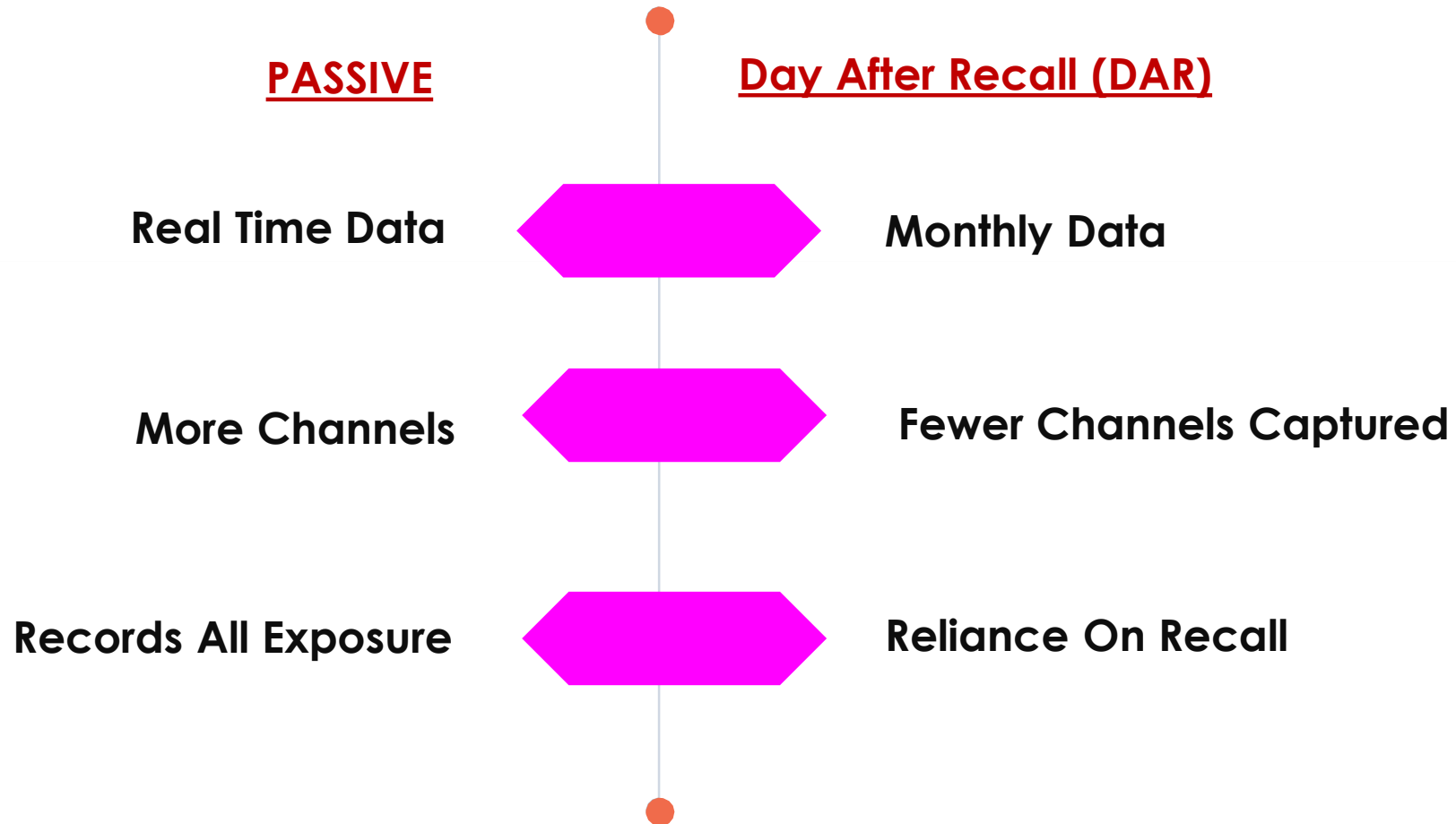


# Our Passive Journey





# Comparison – Passive vs DAR





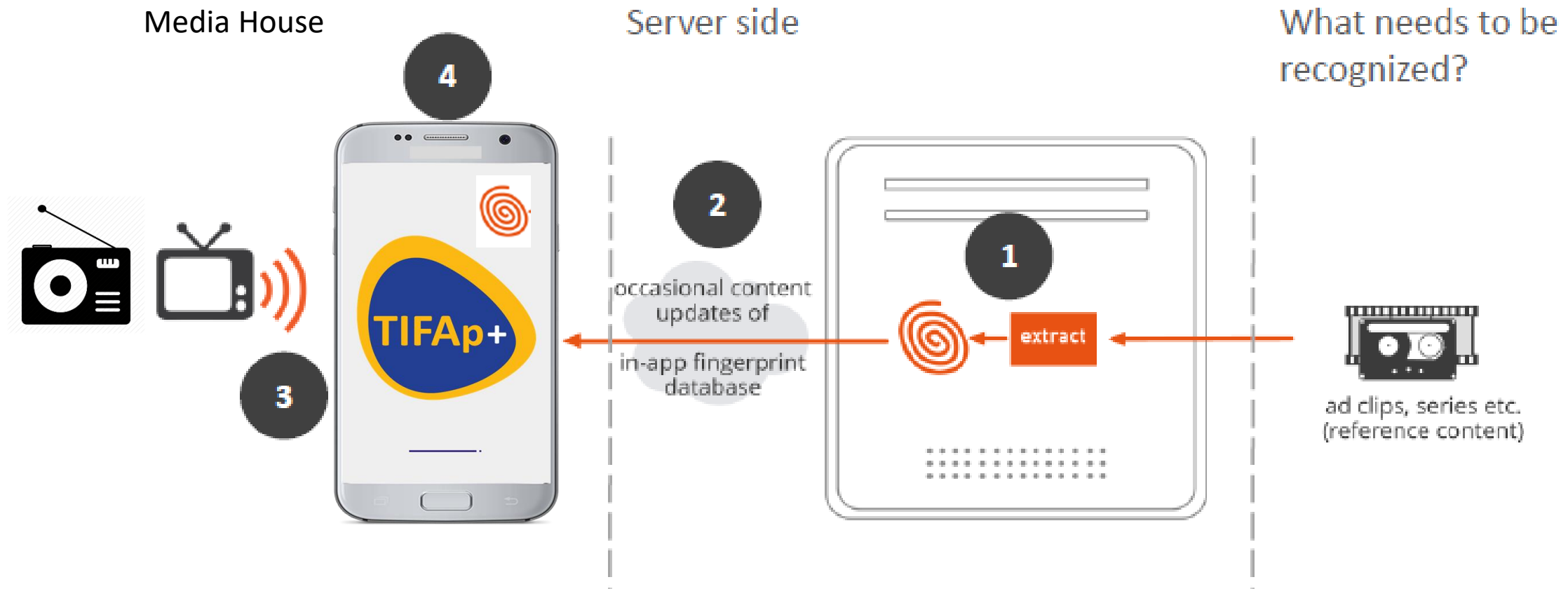
# Leveraging on Technology for Passive Audience Measurement



# Passive Audience Methodology

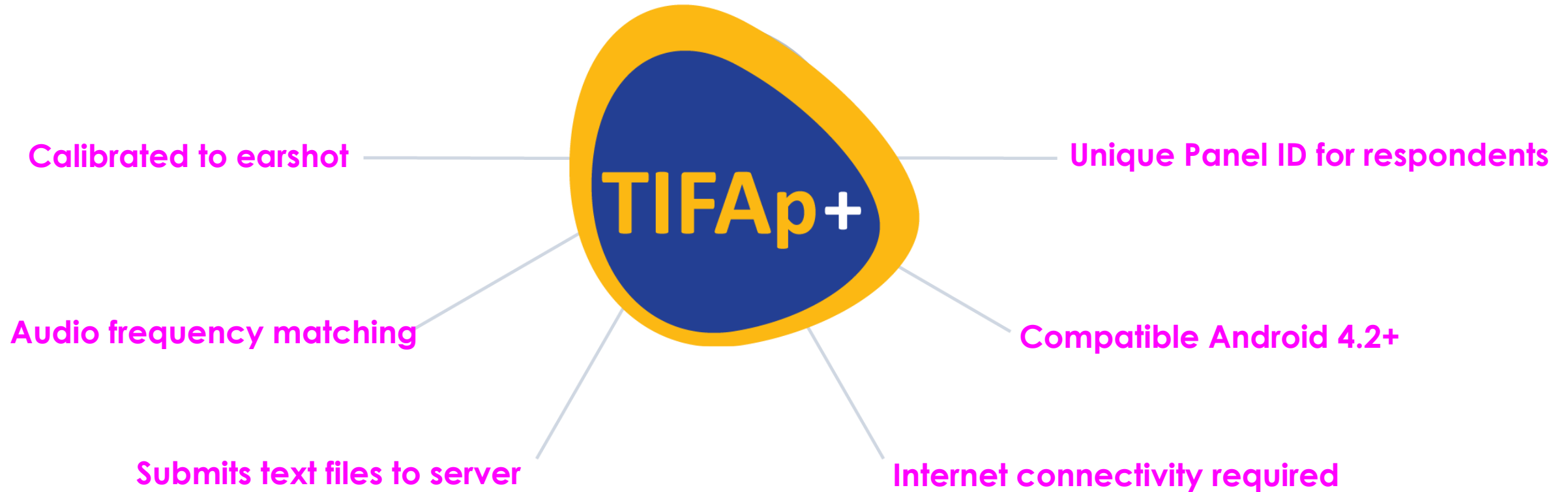


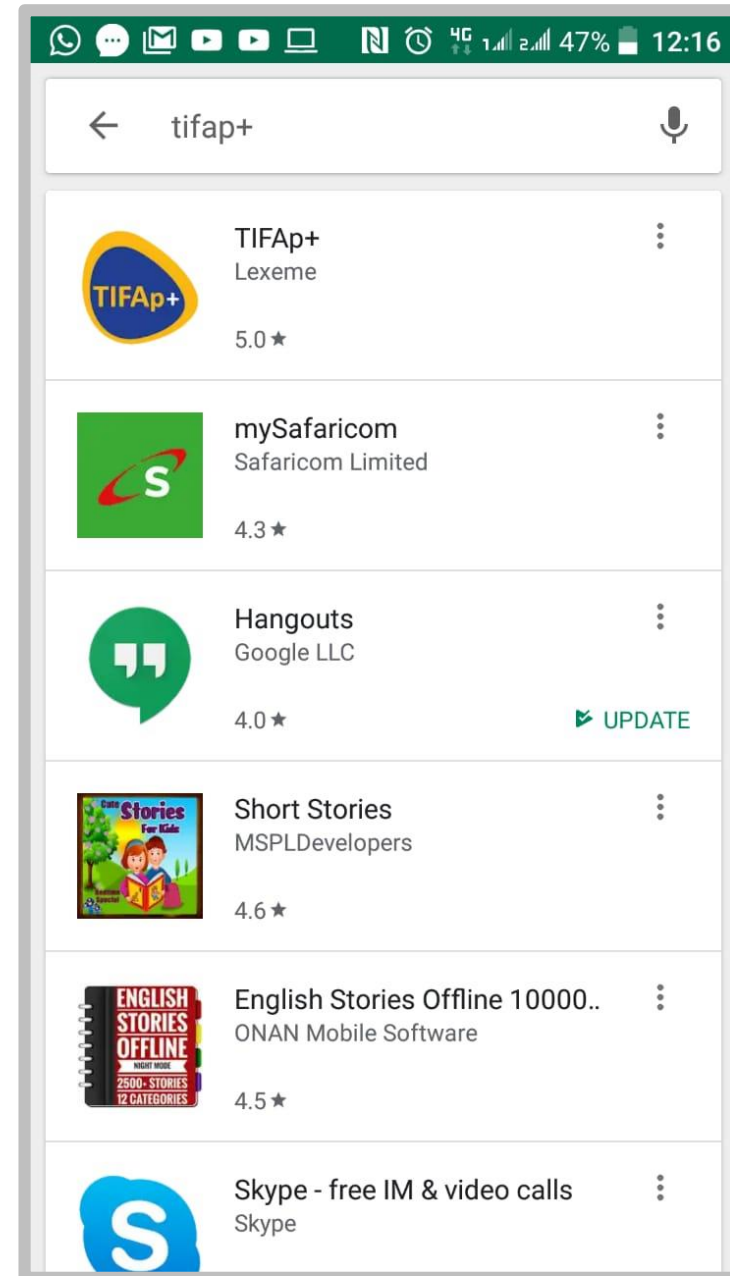
- ❑ Passive is data collection methodology **without active involvement** of respondents.
- ❑ TIFA passive collects respondents' media consumption behavior **using a smartphone**.





# Key features of TIFAp+







# TIFAp+ Live Demo



# TIFAp+ : FAQs from Panelists

**When I am offline, do you get data?**

No, but will keep collecting media consumption until when you are next online.

**Do you listen to my conversation?**

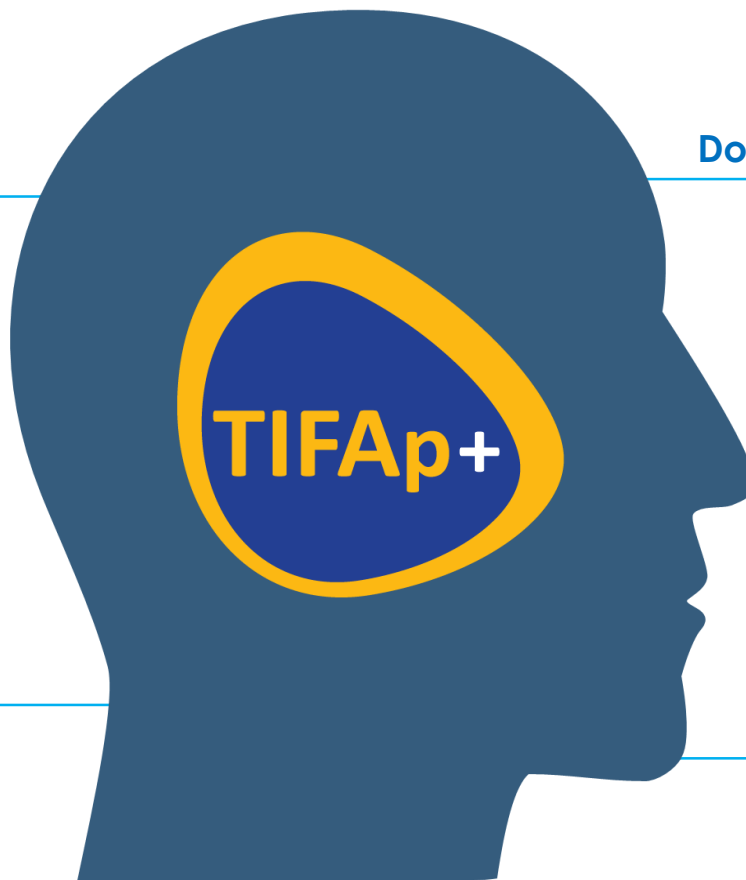
The app does not listen or store any personal information.

**Does app use my phone storage?**

No, the data is saved in the form of text files.

**Does the app use up my data bundles?**

TIFA has already purchased bundles for the app for reach respondent.





# No objection letter



**Our Ref: CA/LCS/1000/GEN/Vol. III**

18<sup>th</sup> April 2019

**Mr. Kweya Gerry**  
Managing Director  
Tifa CCI Kenya Limited  
P.O Box 59629  
Nairobi-00200

Dear Sir,

**RE: PASSIVE MEDIA AUDIENCE METERING APPLICATION LETTER  
OF NO OBJECTION**

Reference is made to your letter dated 5<sup>th</sup> March 2019 on the above subject matter.

We have reviewed and note the content of your letter and wish to inform you that the Authority does not have any objection to the use of the passive media audience metering application.

In the event you need any further clarification, please do not hesitate to contact the undersigned.

Yours faithfully,

A blue ink handwritten signature, appearing to read 'Liston Kirui', written over a light blue horizontal line.

**Liston Kirui**  
**For: DIRECTOR GENERAL**



# Panelists recruitment



- Panel:** respondents recruited to take **part in research sessions or projects continuously** over a period of one year.
- Studies that focus on the same respondents over a period of time enable the investigator secure better evidence media consumption



# Recruitment Process



## Sample

- Based on establishment survey 2015



## HH visits

- Screening
- Demographics



## Screening

- Type of handset
- Duration in location



## Consent

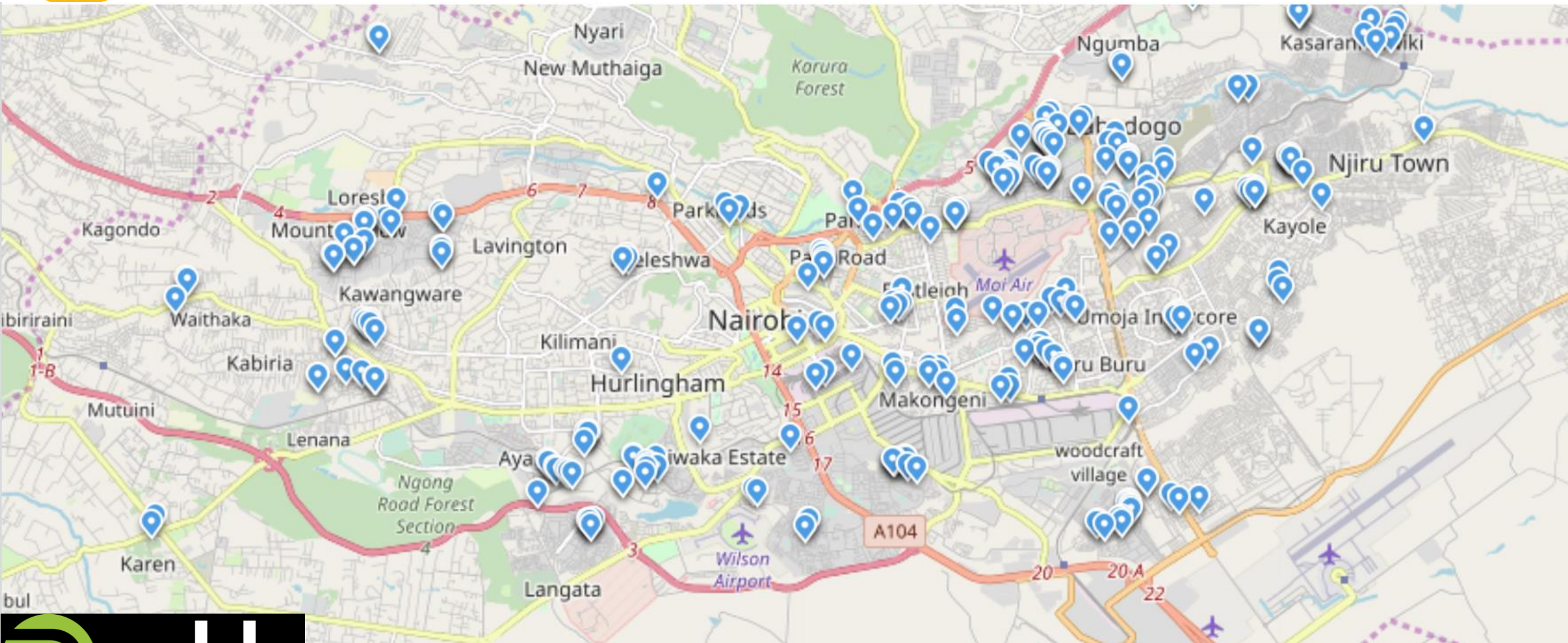
- Agree to terms in writing
- Provide unique ID



## Install App

- Confirm if data received in server

# Sample Spread: Location For Recruitment





# Sample Distribution



Age Group	Establishment	Passive		LSM	Establishment	Passive
15-17 years	2.7%	2.7%		LSM 1-2	3.6%	3.6%
18-24 years	25.4%	25.4%		LSM 3-4	15.0%	15.0%
25-34 years	42.5%	42.5%		LSM 5-7	27.2%	27.2%
35-44 years	18.7%	18.7%		LSM 8-11	36.8%	36.8%
45+ years	10.7%	10.7%		LSM 12+	17.4%	17.4%
Gender	Establishment	Passive				
Male	51.7%	51.7%				
Female	48.2%	48.2%				



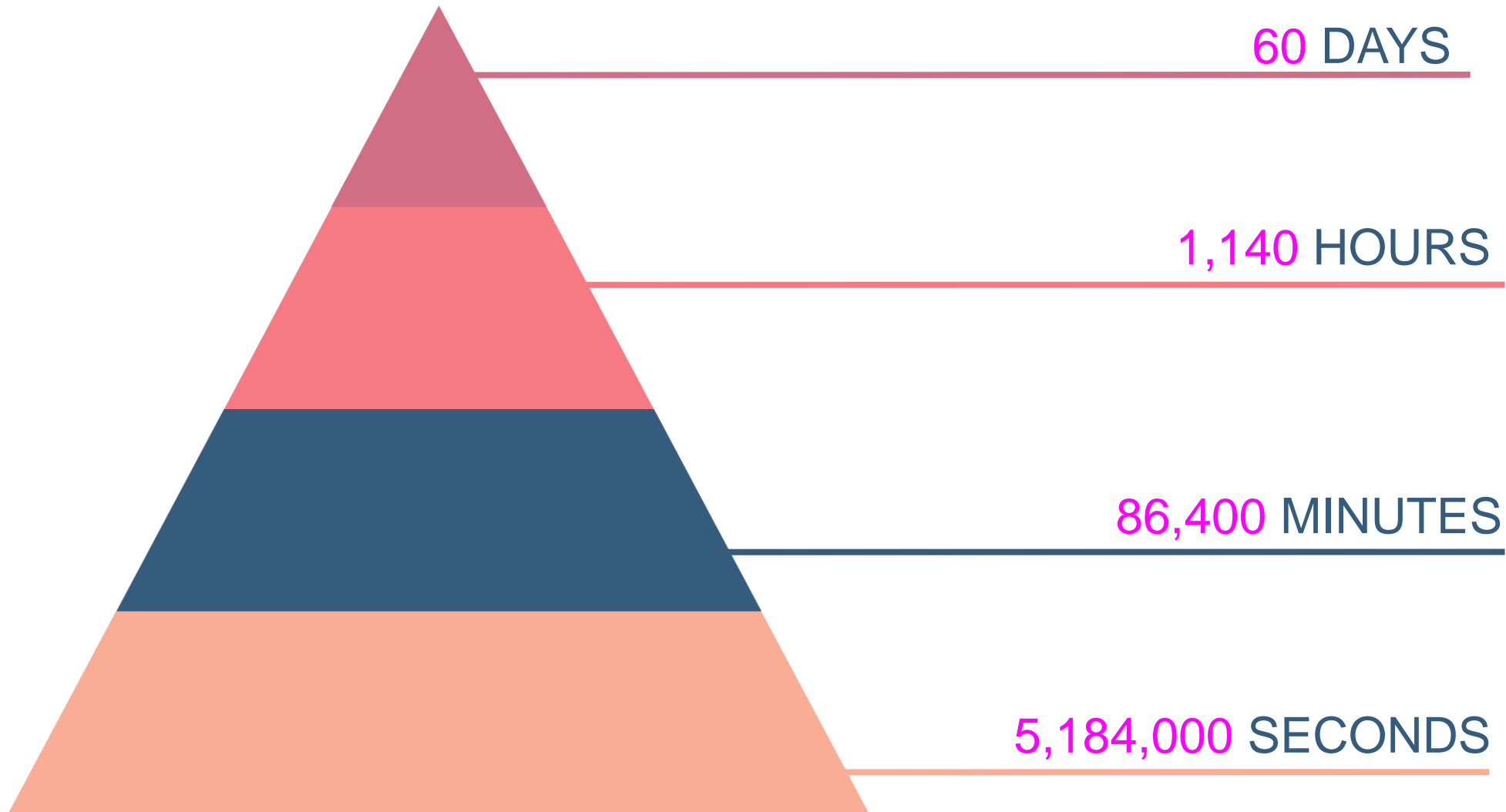
# Methodology



Data Collection	Passive
Target Population	15+ Years Media Consumers
Duration of Data Collection	April-May 2019
Geography	Nairobi Topography
Sample Size	400 media consumers
Margin of Error	+/-4.8%



# TIFAp+ Big Data : April to May 2019



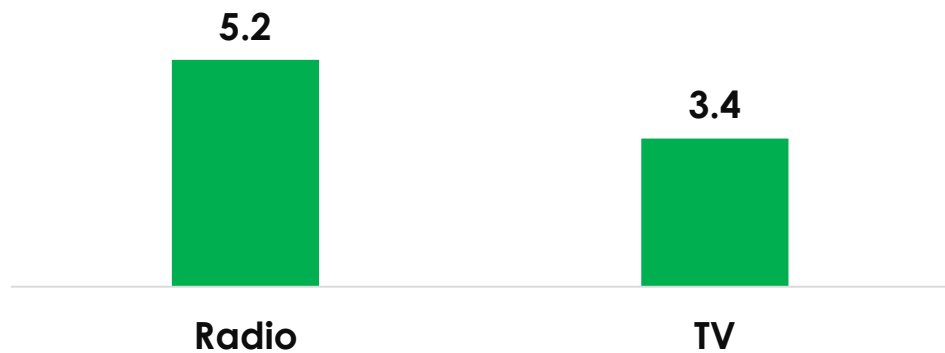


# Key Media Consumption Insights

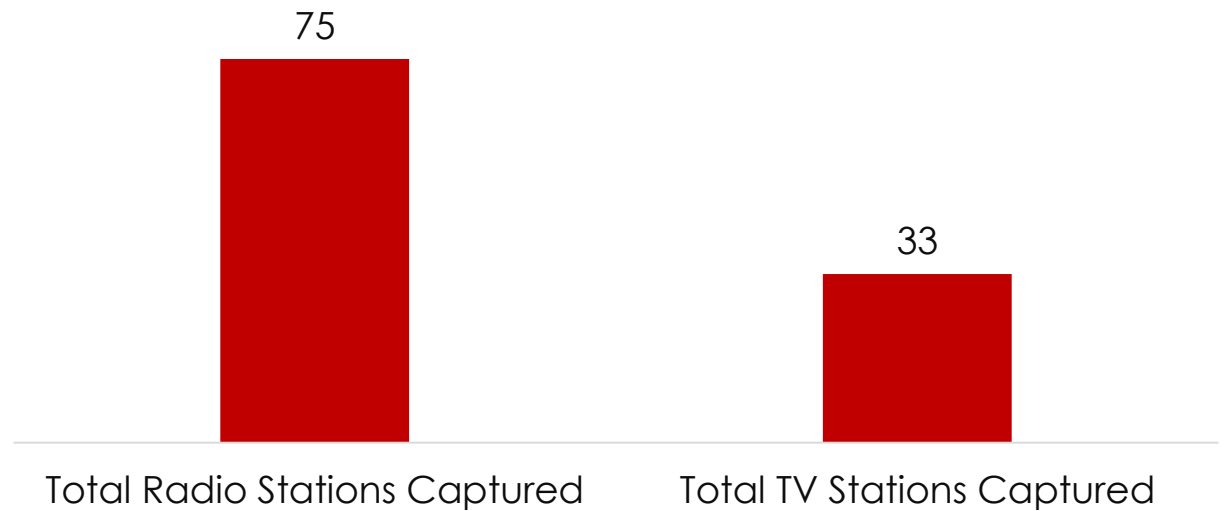


# Average number stations

*Average number of stations per day*

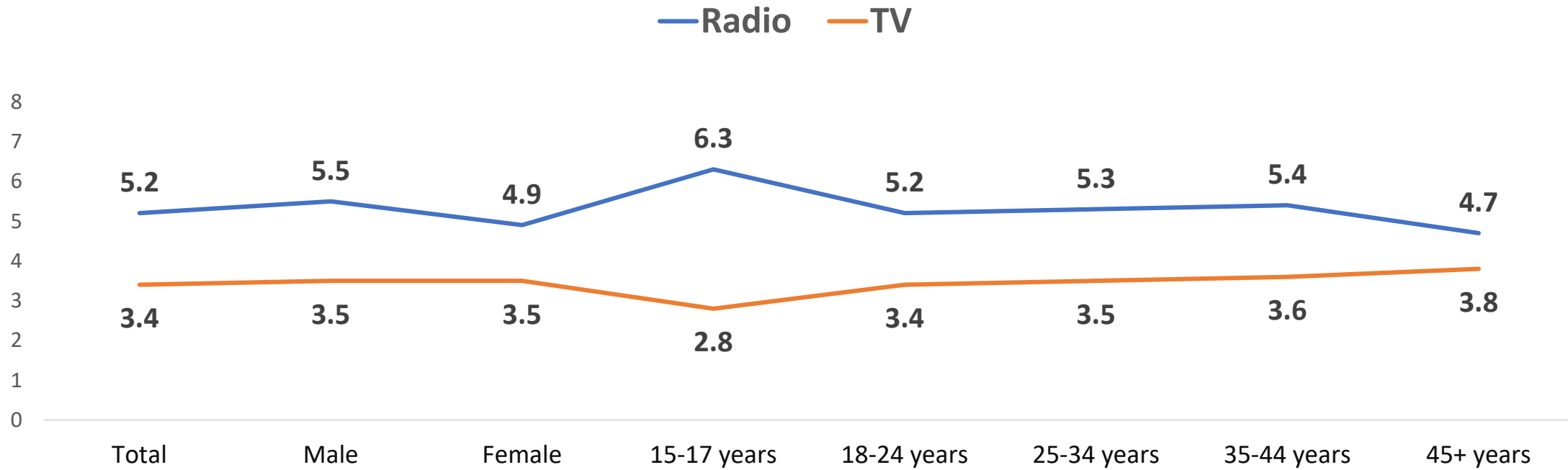


*Average number of stations captured for all audiences*





# Average No. of Stations Per day



Media planning – spends across more stations

# Panelists' Case Studies: One Day Listenership

## Panelist 100178 (11<sup>th</sup> April 2019)

Citizen Radio

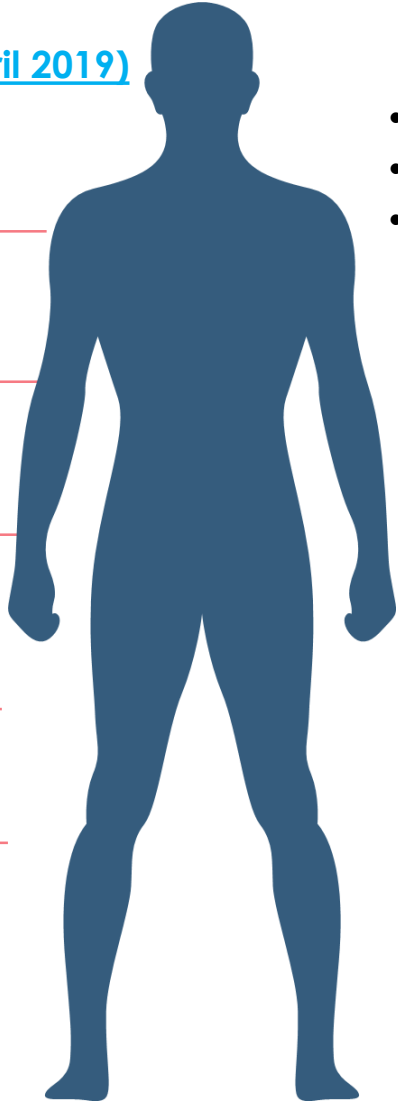
Nation FM

NRG Radio

Kiss FM )

Radio Maisha

Urban Radio



- Male
- 18 - 34 Years
- LSM 5-7

## Panelist 100539

Ghetto FM

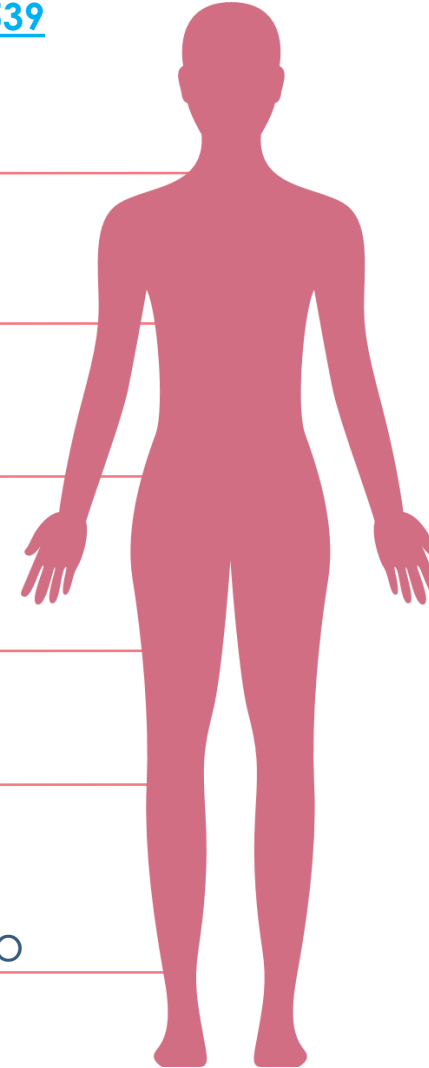
One FM

Radio Taifa

Urban Radio

Baraka FM

Radio Jambo



- Female
- 25 - 44 Years
- LSM 8-11



- ❑ Different methodologies **yield different results** i.e DAR , diaries and passive ,etc.
- ❑ Passive data collection methodologies always capture **more media channels** being consumed by audiences.
- ❑ The results for passive **should NOT be compared** with data from other methodologies.

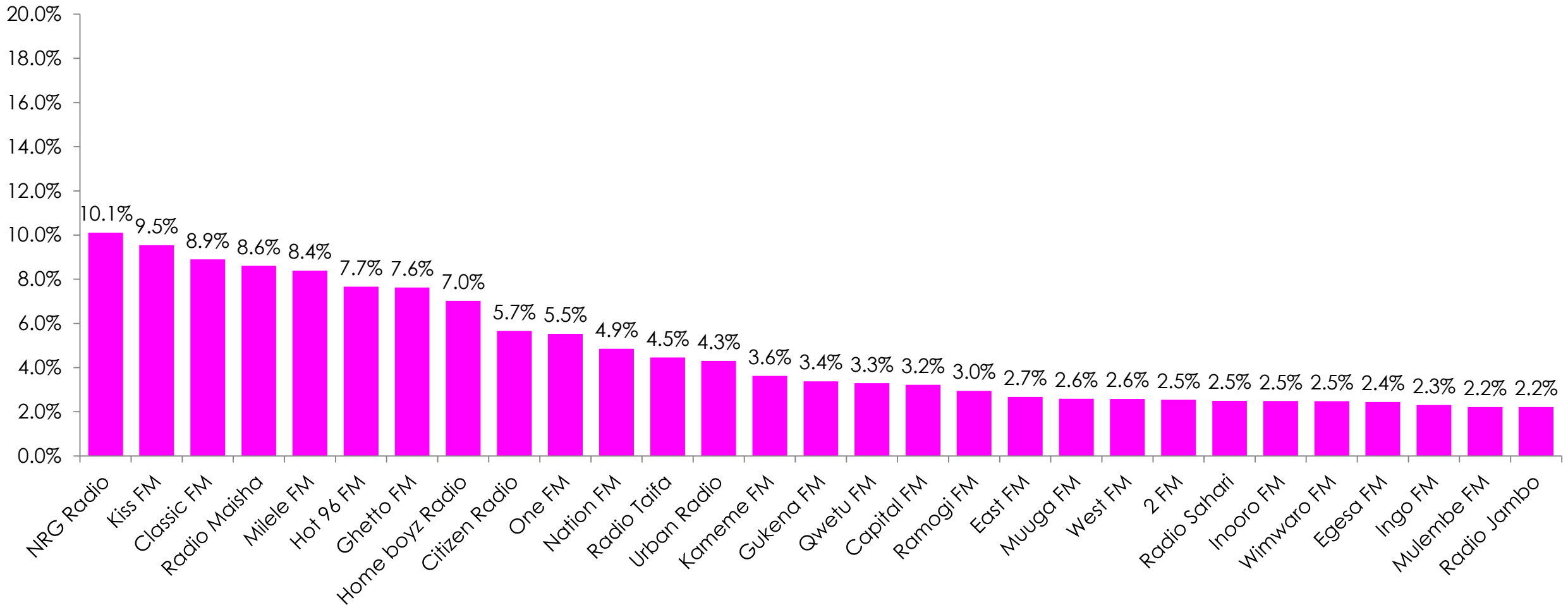


# Media Research – Key Indicators

- ▶ **Reach** : The proportion of the population/respondents that tuned in to a particular station
- ▶ **Share** : The percentage of the total viewing or listening audience 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.
- ▶ **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 2.09M base** : Past 7 Days Media Consumers in Nairobi (Television/Radio Print And Internet) as per the KARF Establishment Survey (Feb/Mar 2015).



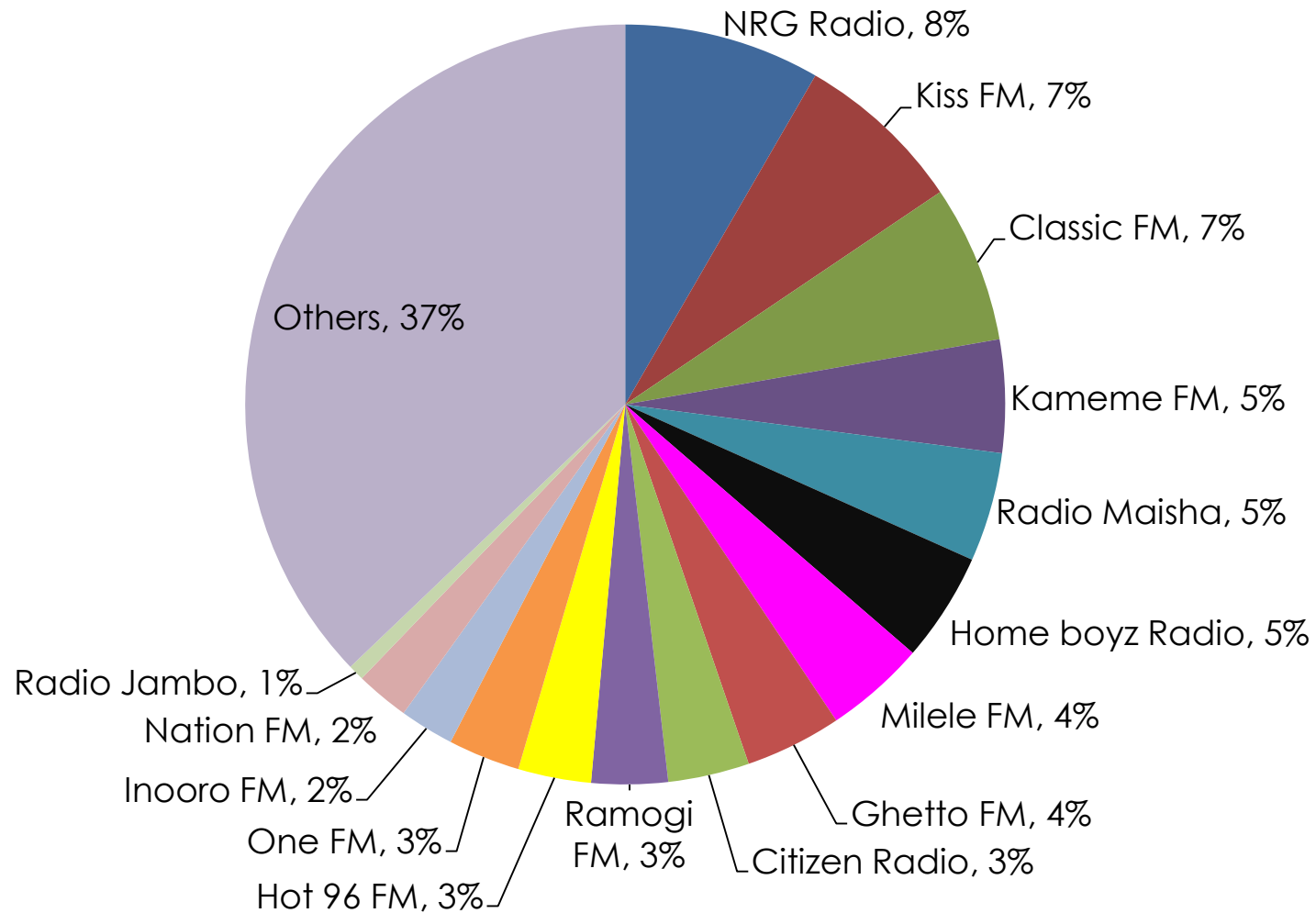
# Radio Reach: Nairobi Only



Base: 2.09M (Past 7 days media consumers)



# Radio Share : Nairobi Only

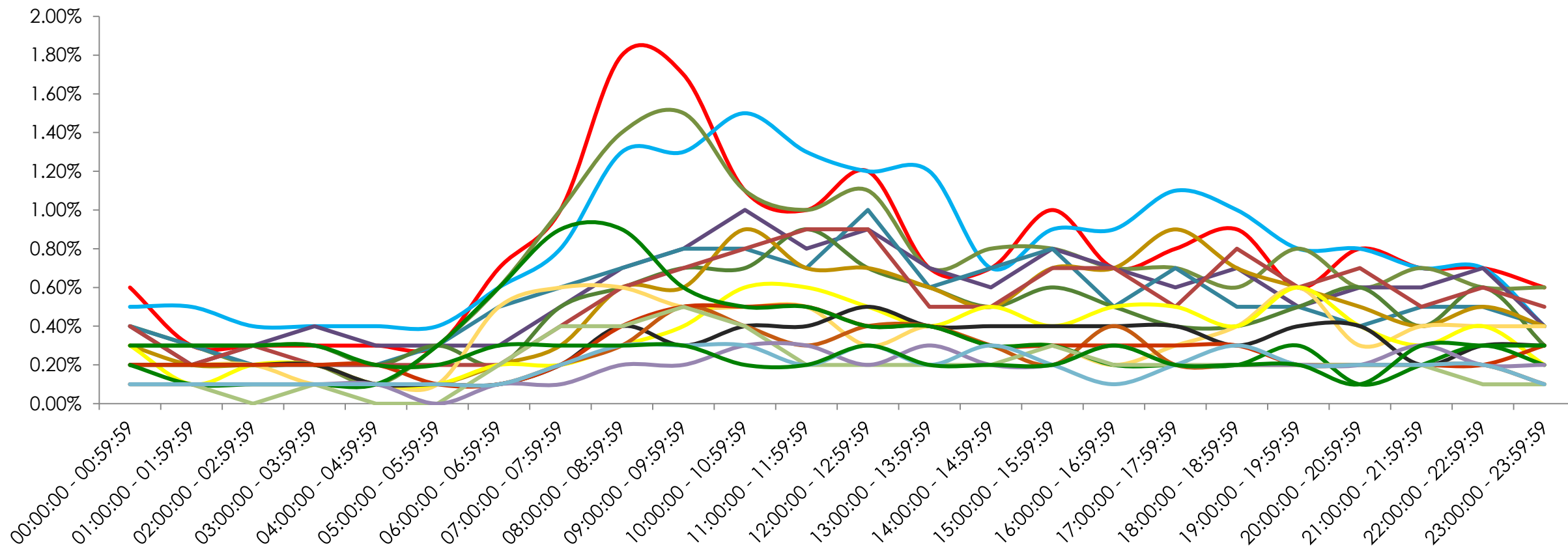


Base: 2.09M (Past 7 days media consumers)



# Radio Trends – Average Week : Nairobi Only

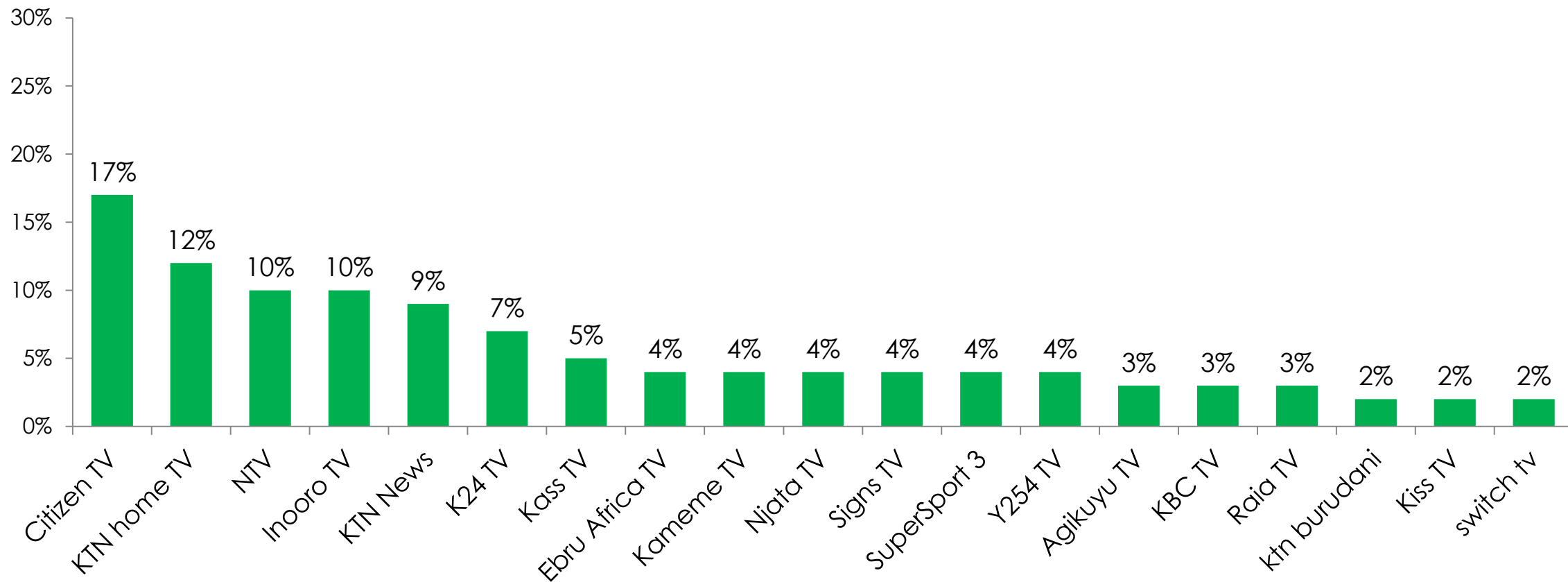
- NRG Radio
- Kiss FM
- Classic FM
- Radio Maisha
- Milele FM
- Hot 96 FM
- Ghetto FM
- Home boyz Radio
- Citizen Radio
- One FM
- Nation FM
- Radio Taifa
- Urban Radio
- Kameme FM
- Gukena FM
- Qwetu FM
- Capital FM
- Ramogi FM



Base: 2.09M (Past 7 days media consumers)



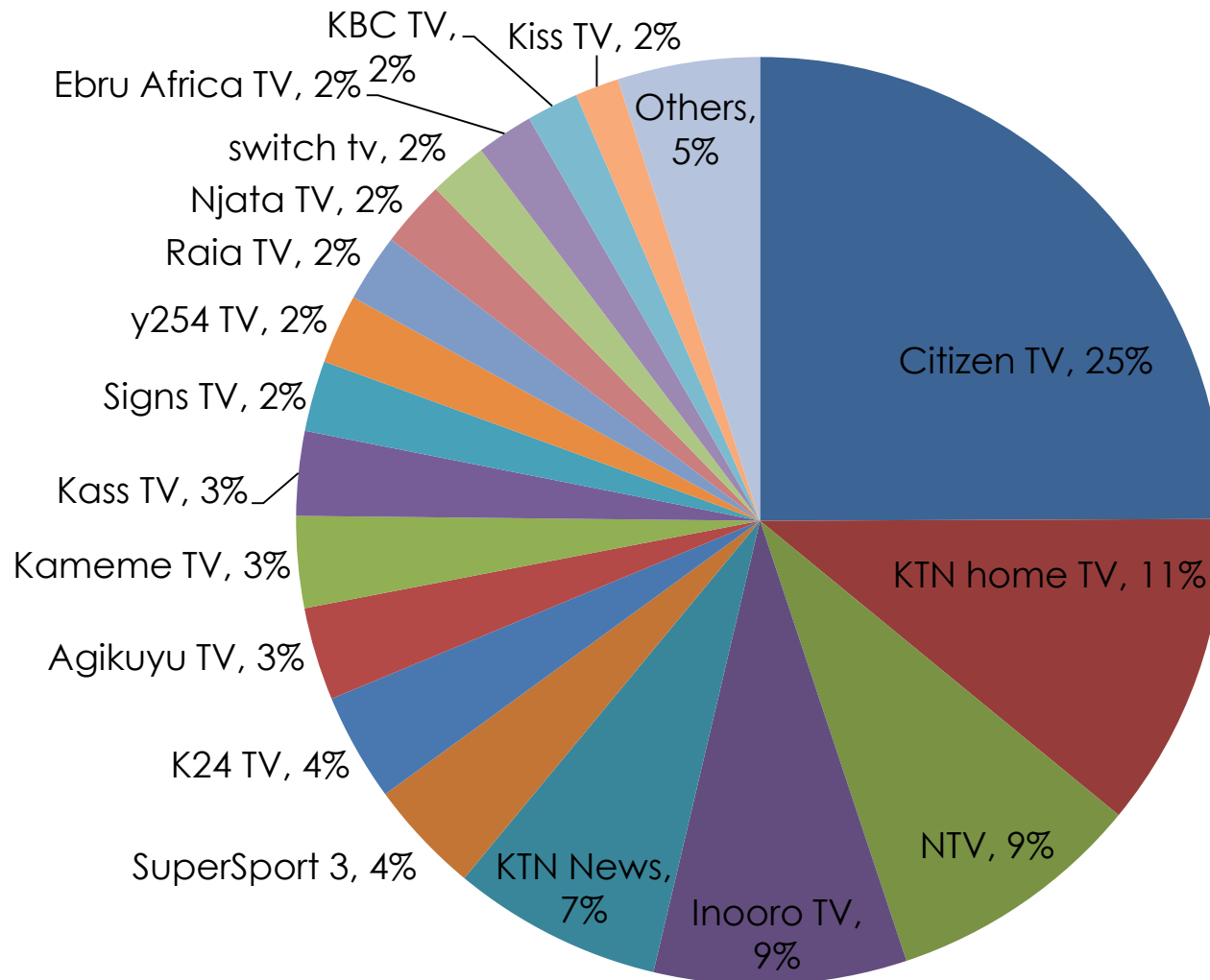
# TV Reach: Nairobi Only



Base: 2.09M (Past 7 days media consumers)



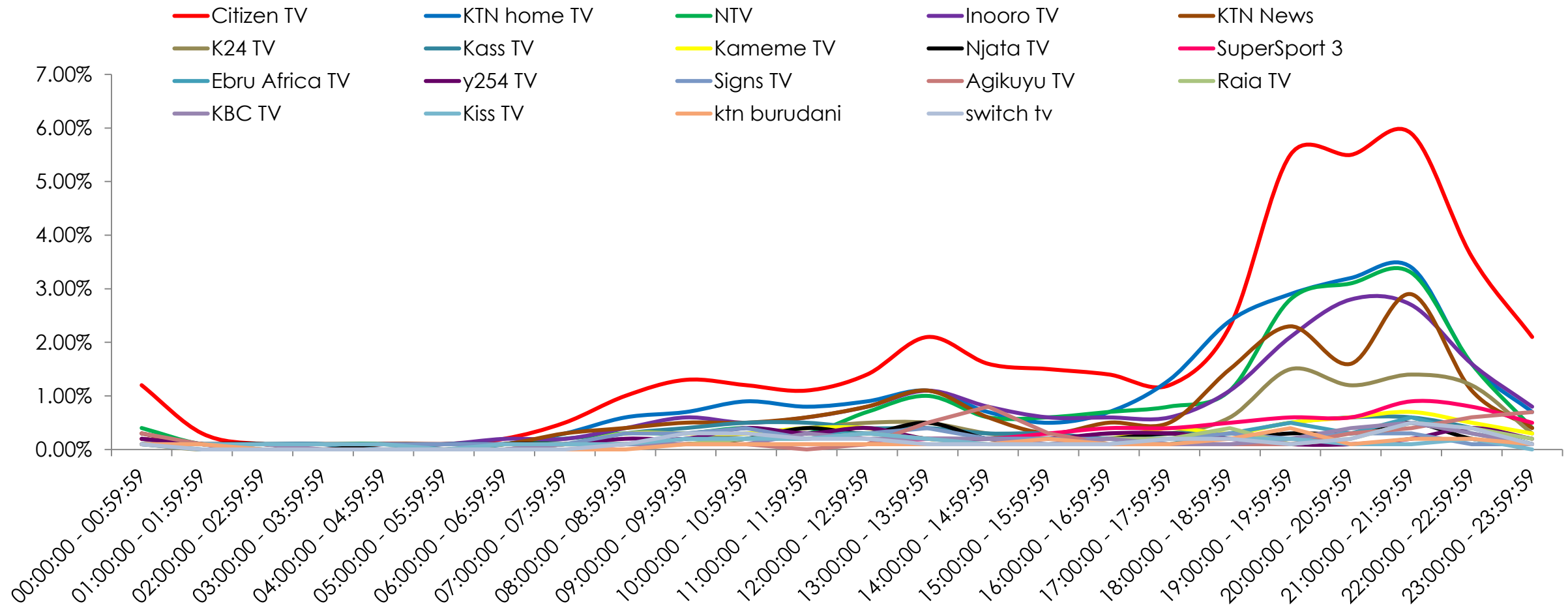
# TV Share : Nairobi Only



Base: 2.09M (Past 7 days media consumers)



# TV Trends – Week Average : Nairobi Only





# Methodological Considerations



# Methodological Considerations



- **Duration for analysis** – seconds by second? 15minutes slot? 5 minute slot? Considering delayed transmissions across the country.
- **Time shifting media consumption** – capturing media consumption past the airing date. Integration of these into audience ratings
- **Geo-location analysis** – what happens to a respondent who migrates from one region to another? Under which region should he/she be analyzed from?

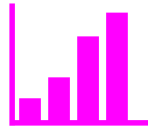
# Key success factors for passive technology roll out

## Update LSMs



Current LSM's are outdated. An urgent need to update the LSM evaluation criteria

## Establishment Survey



Establishment survey is outdated and needs to be refreshed

## Print media



Newspaper readers panel and the data collected 1-3 times a year.

## Costs



Industry to pull together to meet the cost of passive audience research – likely to be grow by 200%



# Immediate Use of TIFAp+

**Consumer deep dives** – research on a specific target group through a customized research panel.

**Public place audiences** – install TIFAp+ in selected public places.

**High Networth Individuals** – research on access to media consumption for affluent panel

**Geocentric media consumption** – research on specific geographies e.g. pre-BTL event, problematic sales region. etc

Costs will be customized based on your target group





# How to connect with TIFAp+ team

We are keen to run a live demo of TIFAp+



# Industry Framework for Audience Research

❑ KARF is the industry body that manages audience research in Kenya.



❑ TIFA is currently the data collection agency for audience research data for KARF using the DAR methodology.

❑ TIFA is keen to work with the industry to roll-out the passive methodology.



Thank  
You!

## TIFA Research Limited

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