

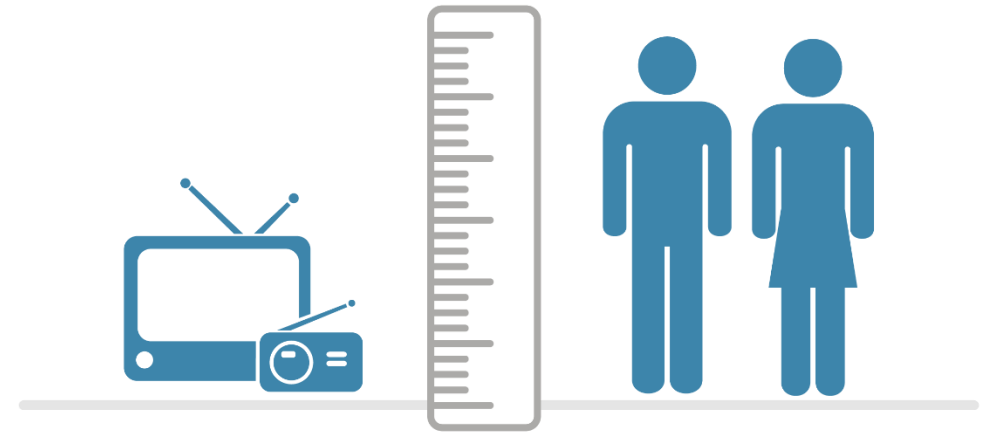


Understand the world

Media Measurement by GeoPoll

GeoPoll is the **largest producer of overnight media ratings** in Africa, delivering next-day ratings for TV, Radio, and Print in Kenya, Ghana, Tanzania, and Uganda. We deliver daily data on ratings, audience, size, and share, collected through our groundbreaking mobile survey methodology. GeoPoll also offers media planning and post-campaign evaluation tools to ensure top broadcasters and advertisers get the immediate **return on investment** they are looking for.

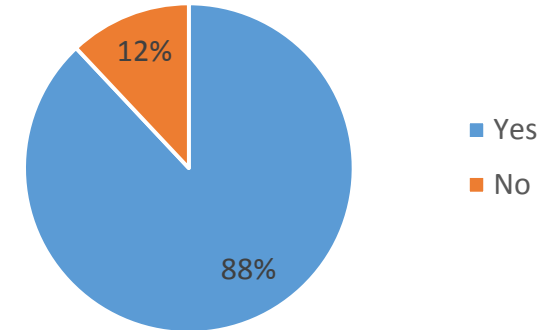
GeoPoll produces public reports on media in Africa monthly: the attached report contains results from a stand-alone survey conducted by GeoPoll on the imminent switch from analogue to digital television transmission in Kenya. These insights enable GeoPoll and others to better understand the attitudes of Kenyans towards the switchover.



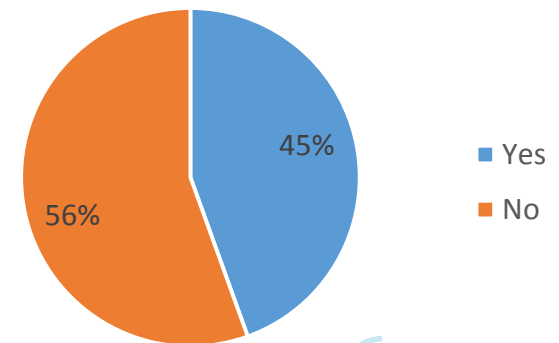
Analogue to Digital Study

- Kenya is currently preparing for a nationwide switch of TV signals from analogue to digital, meaning citizens will need to invest in new equipment to receive television stations.
- The first area to make the switch is Nairobi, where several stations have already been turned off from analogue transmission.
- To assess the public's knowledge and perception of this shift, GeoPoll conducted a country-wide SMS survey to 400 Kenyans, providing a margin of error of 4.9% at the 95% confidence level.
- The survey was conducted on January 12, 2015.
- GeoPoll found that the majority of respondents were aware of the switchover (88%), but many have not taken action to buy the set-top boxes required to receive digital channels.

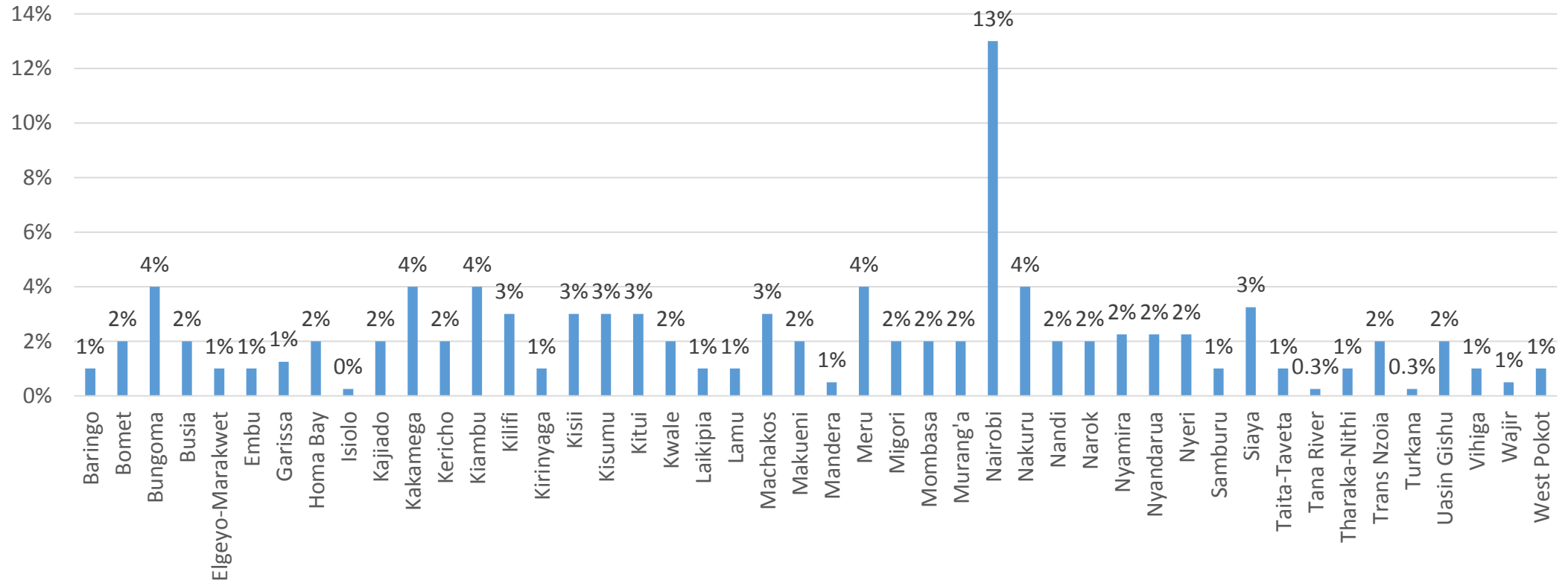
Are you aware of the requirement to have all TV signals move from analogue to digital?



Currently, are you able to access digital signals to view free-to-air TV channels?

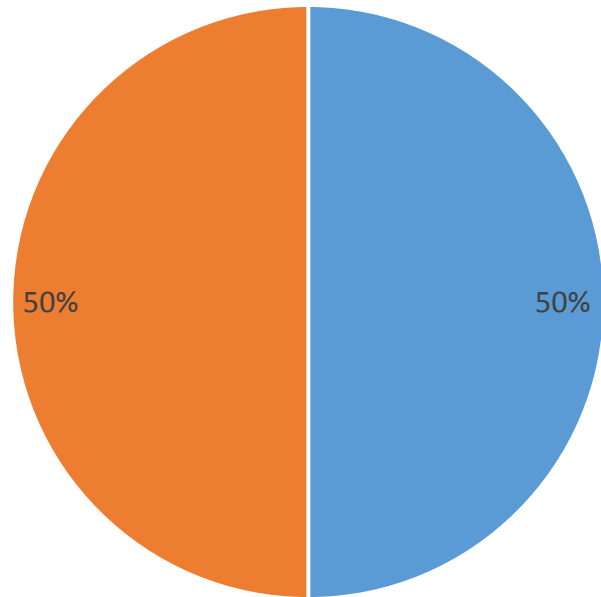


Location Information



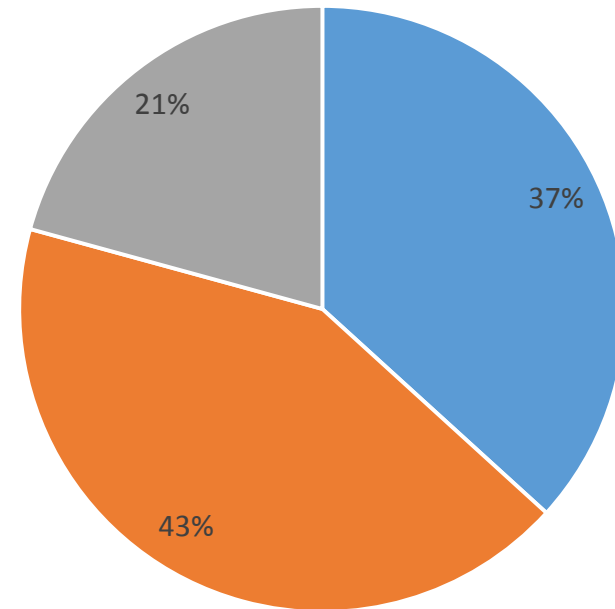
Gender and Age

Gender Distribution



■ Female
■ Male

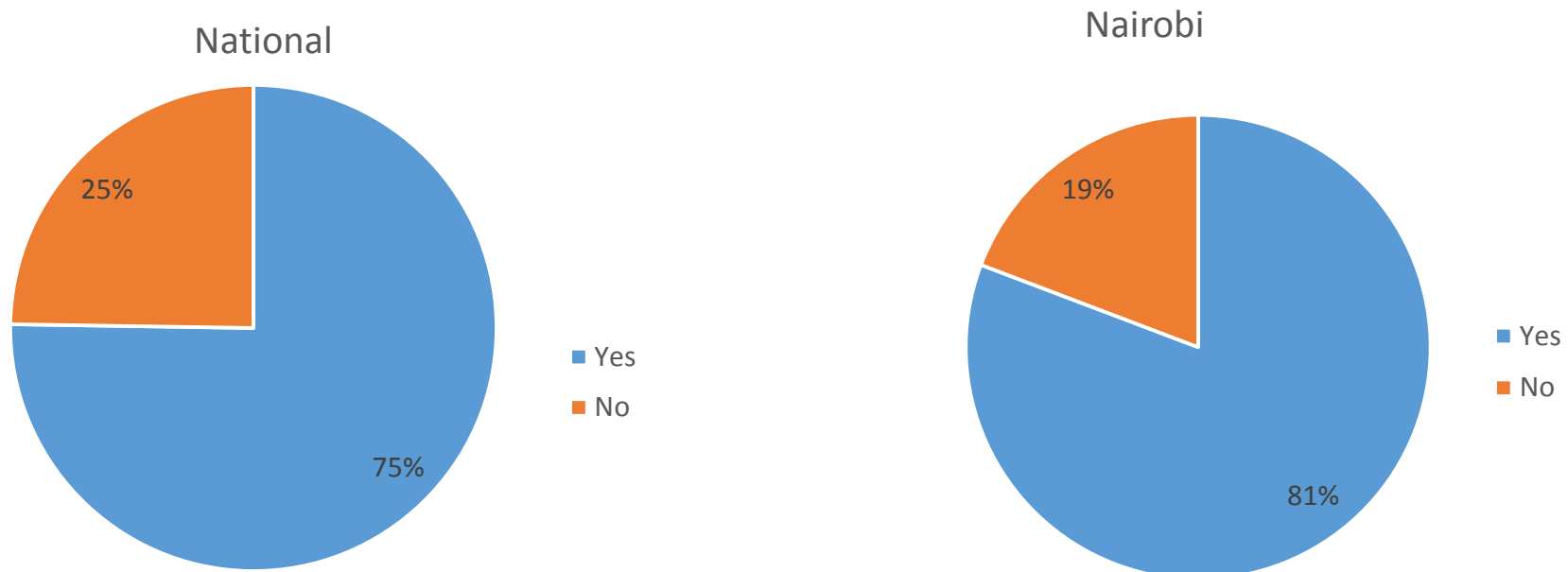
Age Group Distribution



■ 15-24
■ 25-34
■ 35+

Analogue to Digital

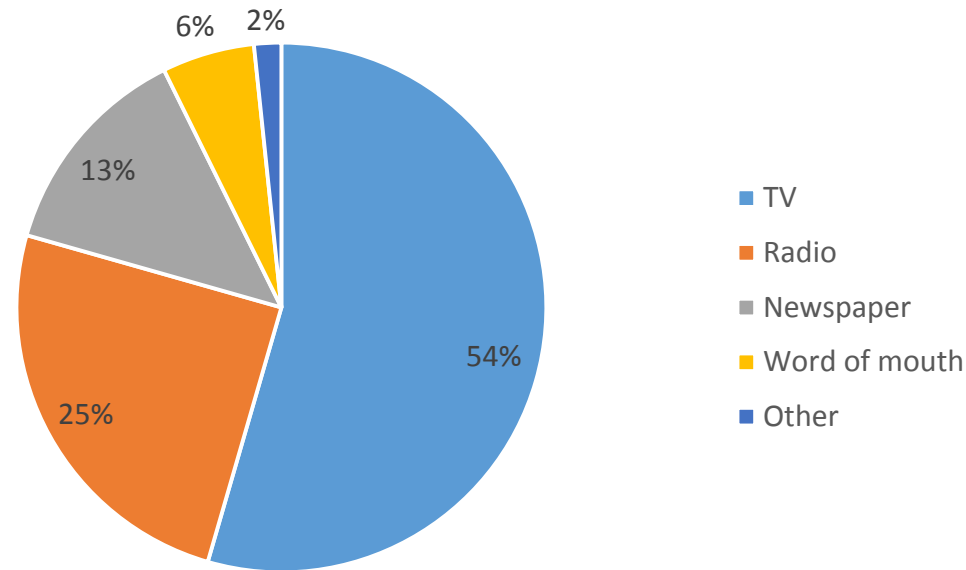
Are you aware of the requirement to have all TV signals move from analogue to digital?
[Reply with 1 or 2] 1)Yes 2)No



- 75% of the sample knew of the move from analogue to digital. In Nairobi, 81% are aware of the requirement to have all TV signals moved.

Source of Information

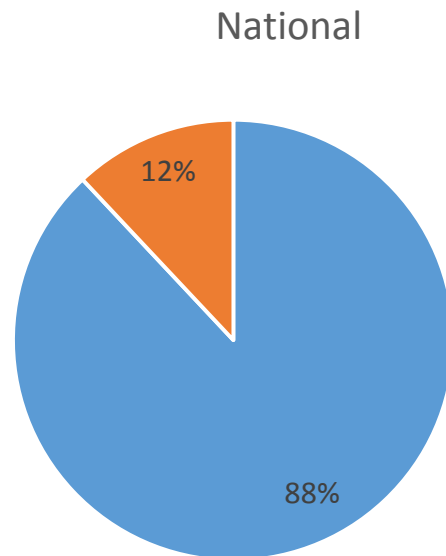
The 301 respondents who knew about the Analogue to Digital switchover were asked what was their most trusted information source regarding the switchover.



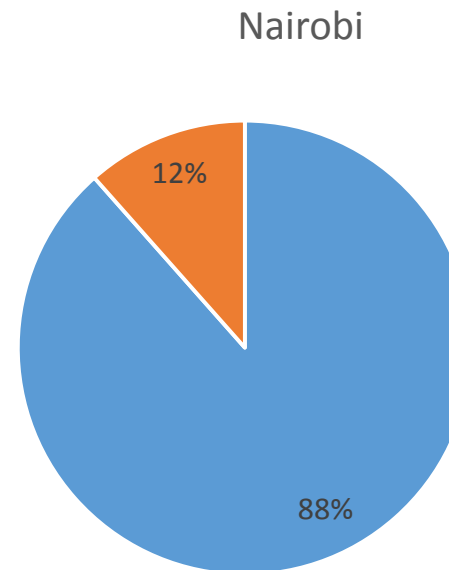
- Out of those respondents who already knew about the switch, 54% of them indicated that the TV was their most trusted source of information in relation to the switch.

Require Digital Decoder/Device

All respondents were asked: Are you aware that after the digital switchover, TV programs will only be available if you have a digital decoder or an inbuilt digital device? 1)Yes 2)No



■ Yes
■ No

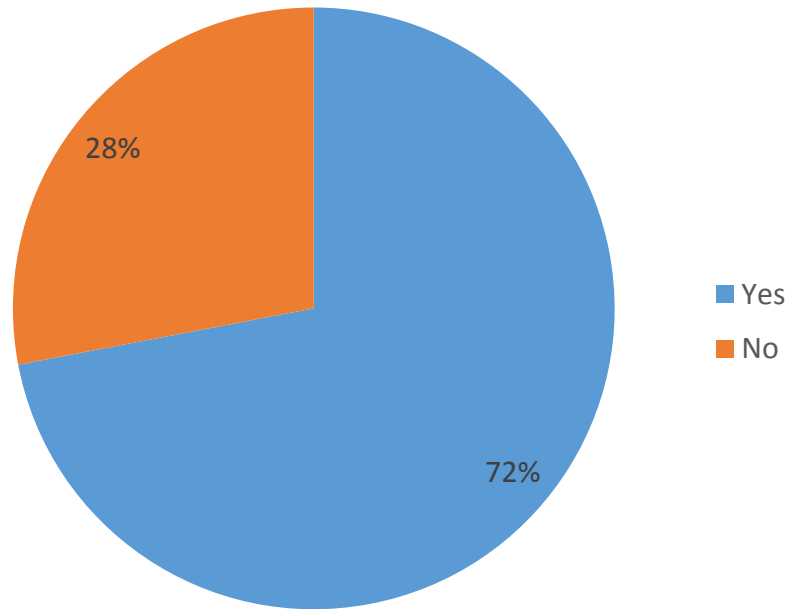


■ Yes
■ No

- 88% of the whole sample indicated that they knew they would need a digital decoder or an inbuilt digital device to watch TV programs once the switchover occurs. The findings were the same in Nairobi, where 88%

Benefits of Digital Signal

Are you aware of the benefits of receiving a digital signal? [Reply with 1 or 2] 1)Yes 2)No



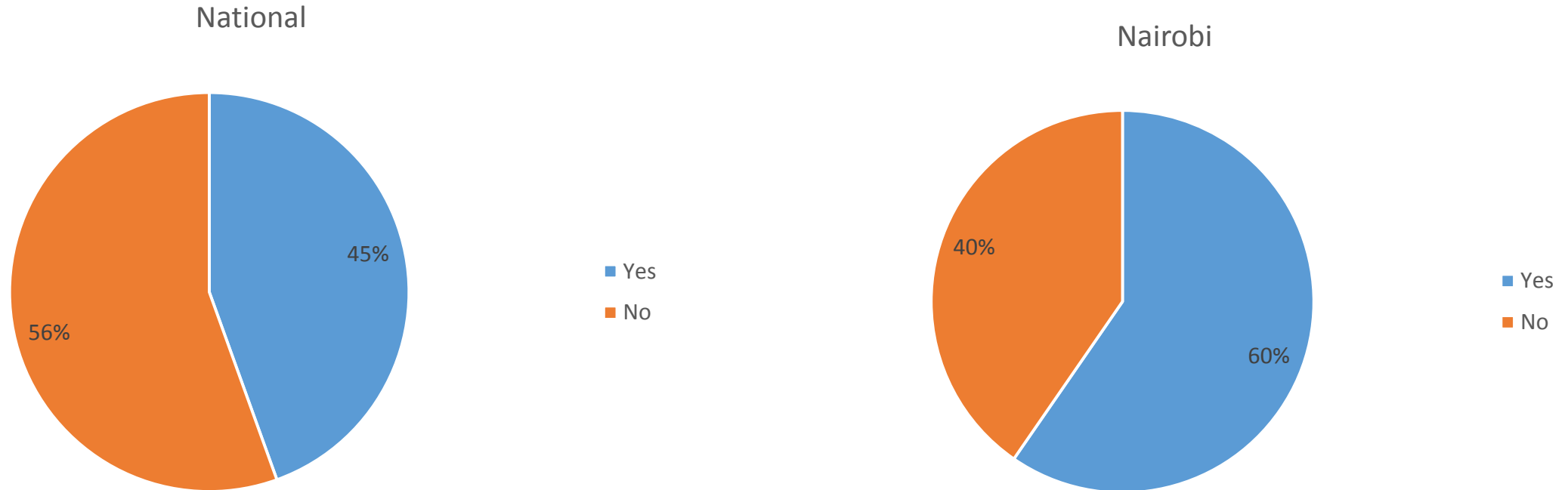
- Out of all 400 respondents, almost 3 in 4 (72%) said they are aware of the benefits of receiving a digital signal.
- In Nairobi, slightly more respondents (77%) were aware of the benefits of digital.

The 288 respondents who indicated they were aware of the benefits were asked to list some of them out:

- Responses centered on clarity of transmission, additional channels, and ease of use of digital transmission.
- “1. Clear, sharper pictures. 2. More variety. 3. More choice.”
- “clear transmission, variety of channels and international broadcasting”
- “Lost of signal is limited and enjoy all stations as you wish”

Able to Access Digital Signals

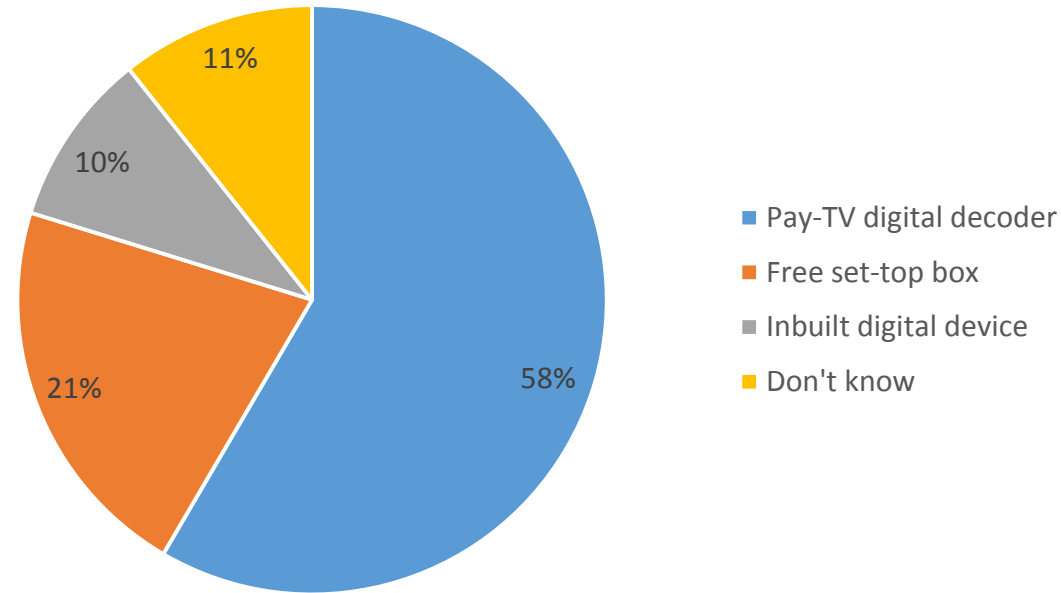
Currently, are you able to access digital signals to view free-to-air TV channels? [Reply with 1 or 2] 1)Yes 2)No



- Currently, a little less than half of the sample, 45%, can access digital signals to view free-to-air TV channels.
- In Nairobi, 60% of the sample can currently access digital stations.

Digital Signal Access

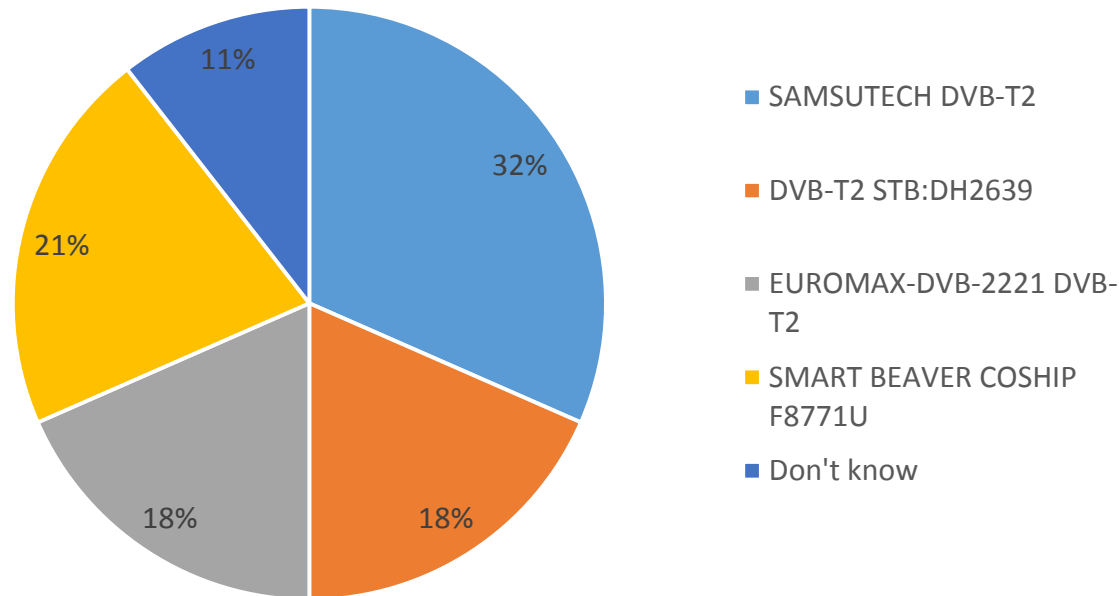
The 178 respondents who can currently access digital signals were asked: How does your TV access the digital signal? [Reply with a number] 1)Inbuilt digital device 2)Pay-TV digital decoder 3)Free set-top box 4)Don't know



- Out of the respondents who can currently access digital signals, 58% of them said they accessed the digital signals through Pay-TV digital decoders, 21% through Free set-top boxes.

Set Top Box

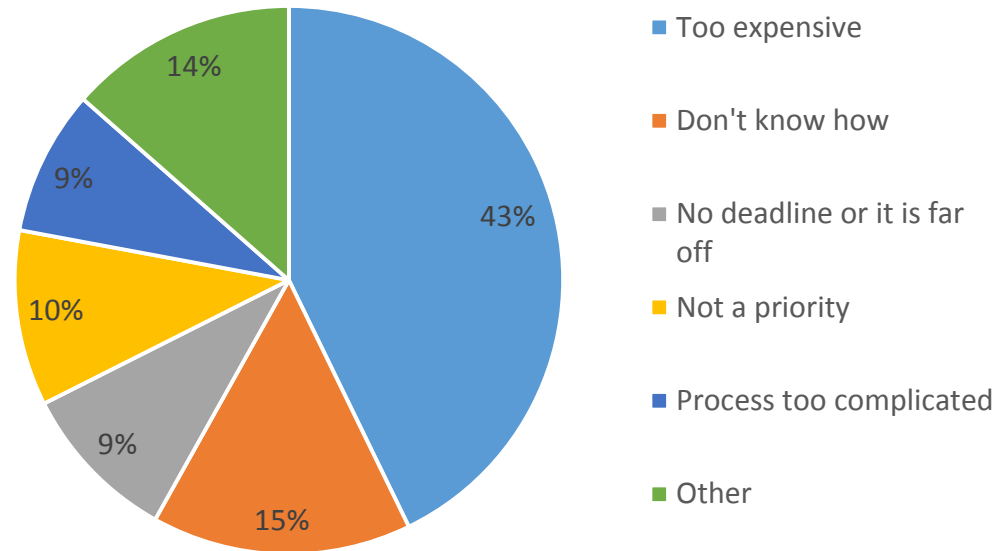
The 38 respondents who indicated they used a set-top box were asked the type of set-top box they own:



- Out of the respondents who indicated they used set top boxes to access digital signals, the SAMSUTECH DVB-T2 was the most owned model (32%)

Reasons for Not Switching

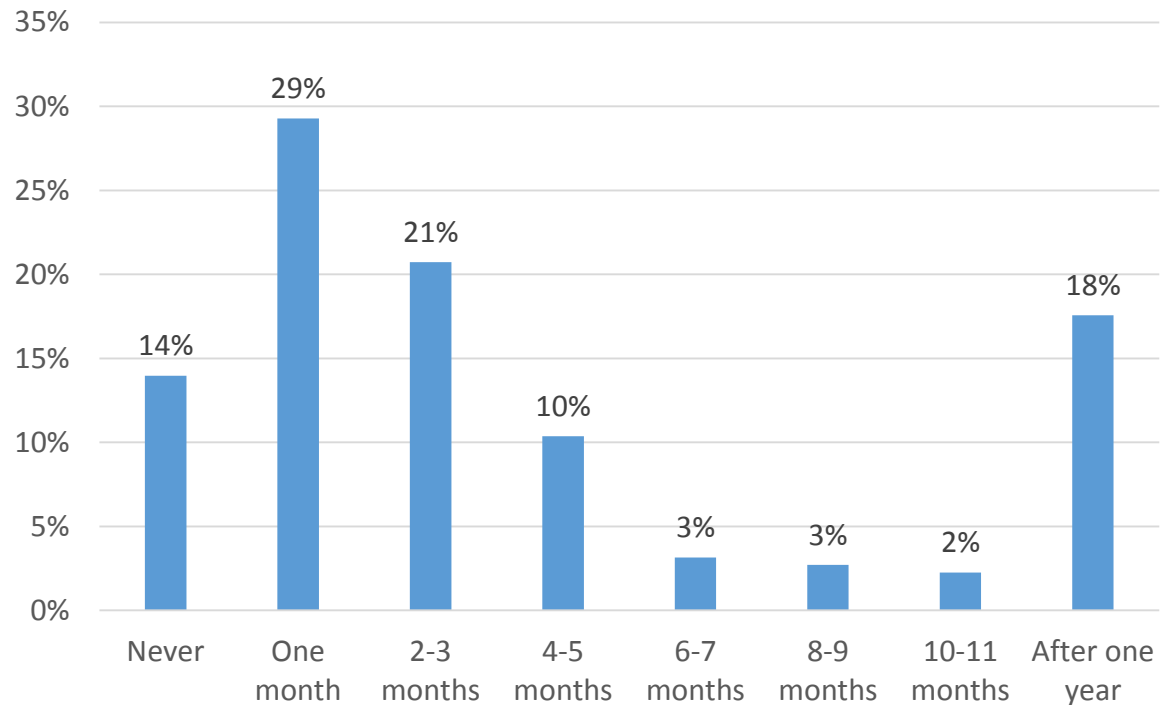
The 222 respondents who had indicated they did not yet have access to digital signals were asked why they haven't switched over.



- The most cited reason amongst respondents for not making the digital switchover yet is because it is too expensive (43%), followed by “don't know how” (15%).

Time of Switch

The 222 respondents who had indicated they currently did not yet have access to digital signals were asked when they planned to switch to digital signal



- Nearly a third of the sample (29%) that doesn't currently have access to digital TV signals plan to switchover in about one month. However, 18% of respondents say they will wait a year to switch over.



For more information on GeoPoll's Media Measurement Service visit:
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