



21<sup>st</sup> February 2015

## Introduction: Survey Parameters

This survey was conducted on 17-18 February, 2015 by CATI (computer-aided-telephonic-interviews) based on a nationally-random sample. It targeted television owners only, of which 932 completed the interviews.

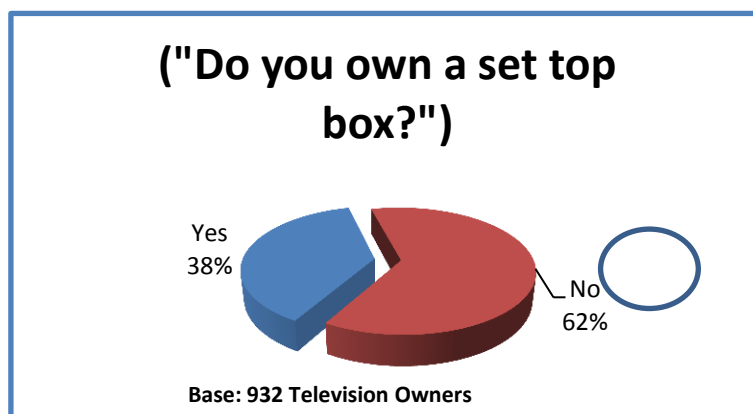
*(Note that the distribution of television owners is about 60%-40% urban-rural, largely matching the actual distribution-ratio of such ownership in Kenya.)*

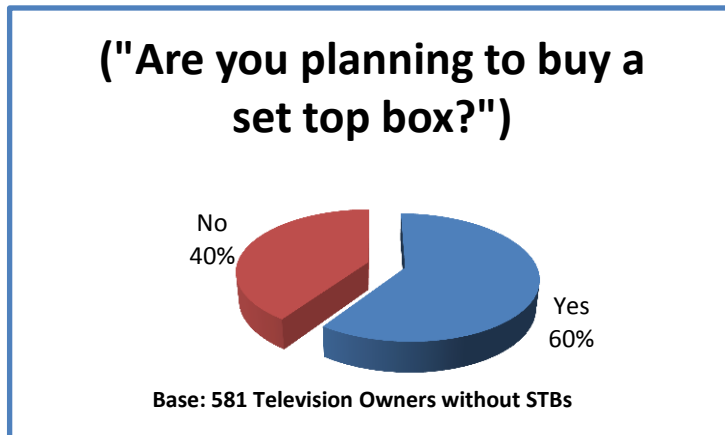
## Ownership of STBs

Analysis from the data obtained in this survey reveals a basic distinction between those television owners who own Set Top Boxes (STBs) and those who do not.

Approximately 4 out of 10 television owners (38%) own a STB. 60% of those who do not own one, plan to purchase one. However, most of them (40%) are not (now) planning on purchasing one, or are not sure whether they will do so.

*(Whether such disinclination to purchase a STB now is because they cannot afford one, or because they know even if they had one they could not watch previously available channels, is unclear.)*





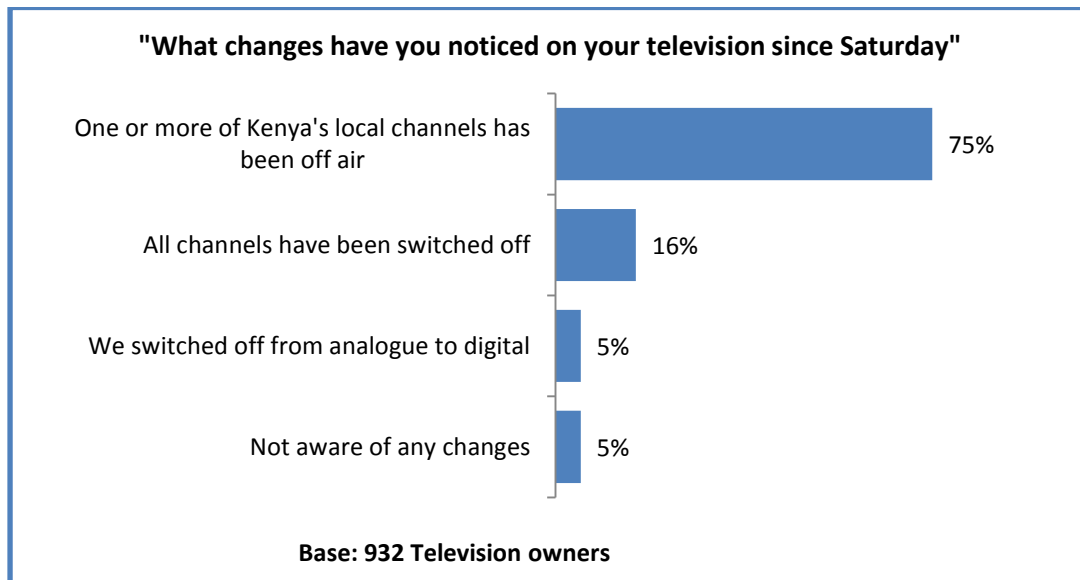
### **Awareness of what transpired on Saturday**

Asked what they had “noticed on television” since the previous Saturday, three quarters of these television owners (75%) mentioned that the main stream television stations stopped transmission. Another 16% reported that “*all channels*” had been switched off (*suggesting that prior to the switch-off, these were the only channels they were able to access*).

A further 5% indicated that they were aware that digital migration (i.e., the switch over from analog) had taken place, without indicating whether only some or all of the channels they had been receiving disappeared. The remaining 5% who were unaware of any changes, clearly either (a) had not watched television at all since the switch-off, or (b) had only been viewing other (non-affected) channels.



## Changes in Broadcasting Noticed by Television Owners since Saturday 14 February



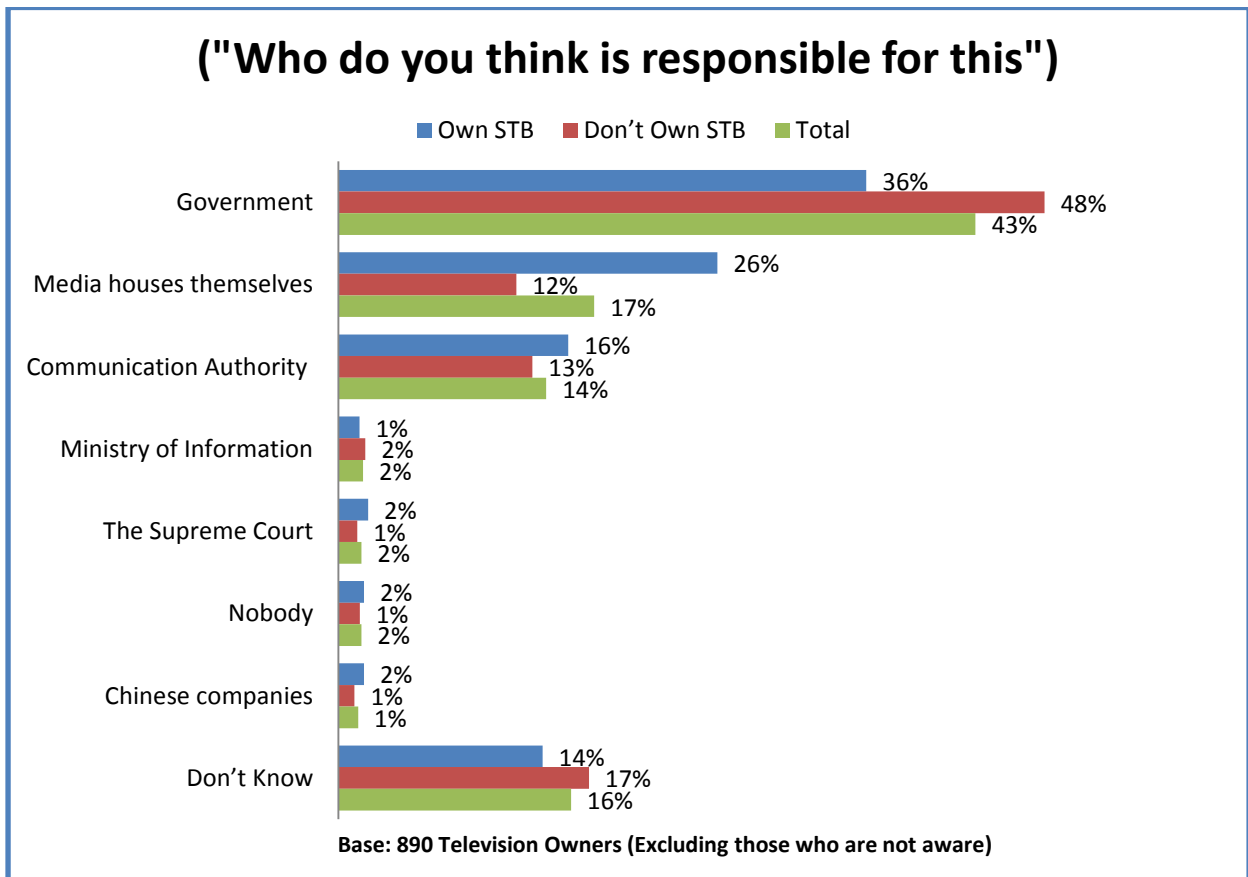
### Who is responsible?

59% of these television owners hold the government responsible for the switch-off, whether such responsibility is attributed the “government” in general; hence, not specific to the Communication Authority or to the Ministry of Information & Communication. Only tiny minorities put the blame on the Supreme Court and the Chinese, though a considerable proportion (16%) are unsure of who is responsible.

A closer look at the contrast between owners vs. non-owners of STBs, more than twice as many of the former (though still only about one quarter) blame the media owners as do the latter (26% vs. 12%), while the reverse is true with regard to the government’s assumed responsibility, though not quite to the same extent (48% vs. 36%).



## Attribution of Responsibility for Switch-Off by: Ownership of STBs



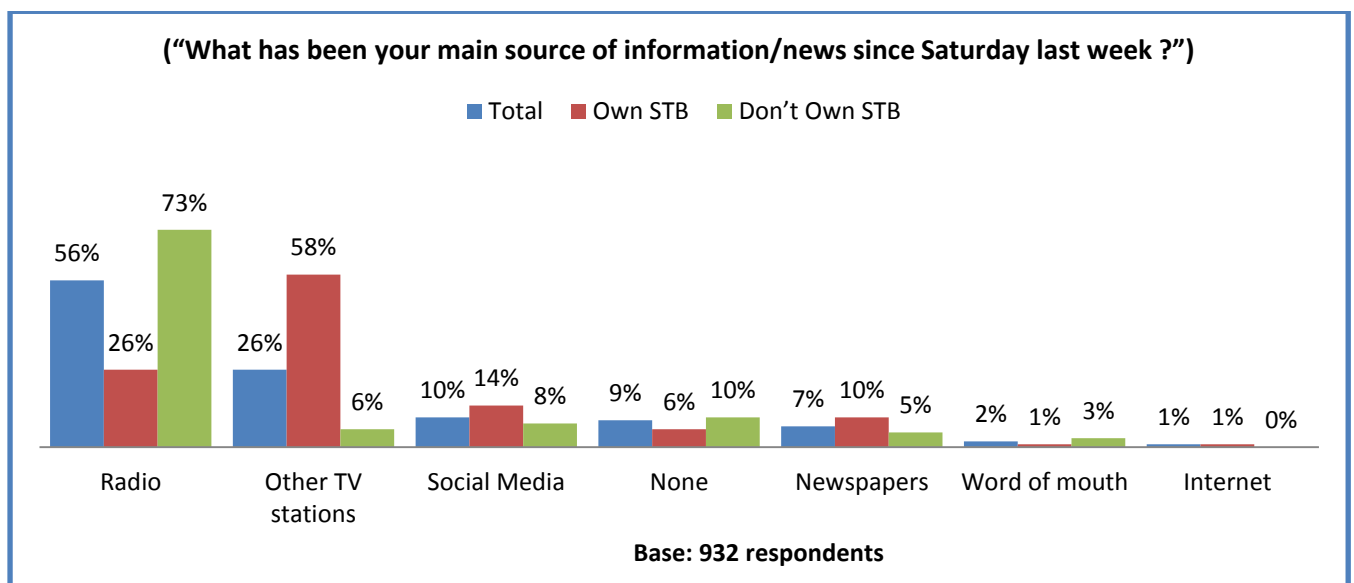
## Radio provides lifeline as main source of information since the switch-off - for Non STB owners

Given the fact that all previous media surveys had identified news content as the main attraction for television viewers, respondents (again, all television owners) were asked how they have responded to the analog switch off with regard to such programs. Barely one quarter (26%) have been relying upon television for news (whether their own sets or someone else's), with a modest majority depending on radio (56%). Most of the rest now depend on newspapers or social media (17% combined), though nearly one-in-ten (9%) are currently going without any news at all.



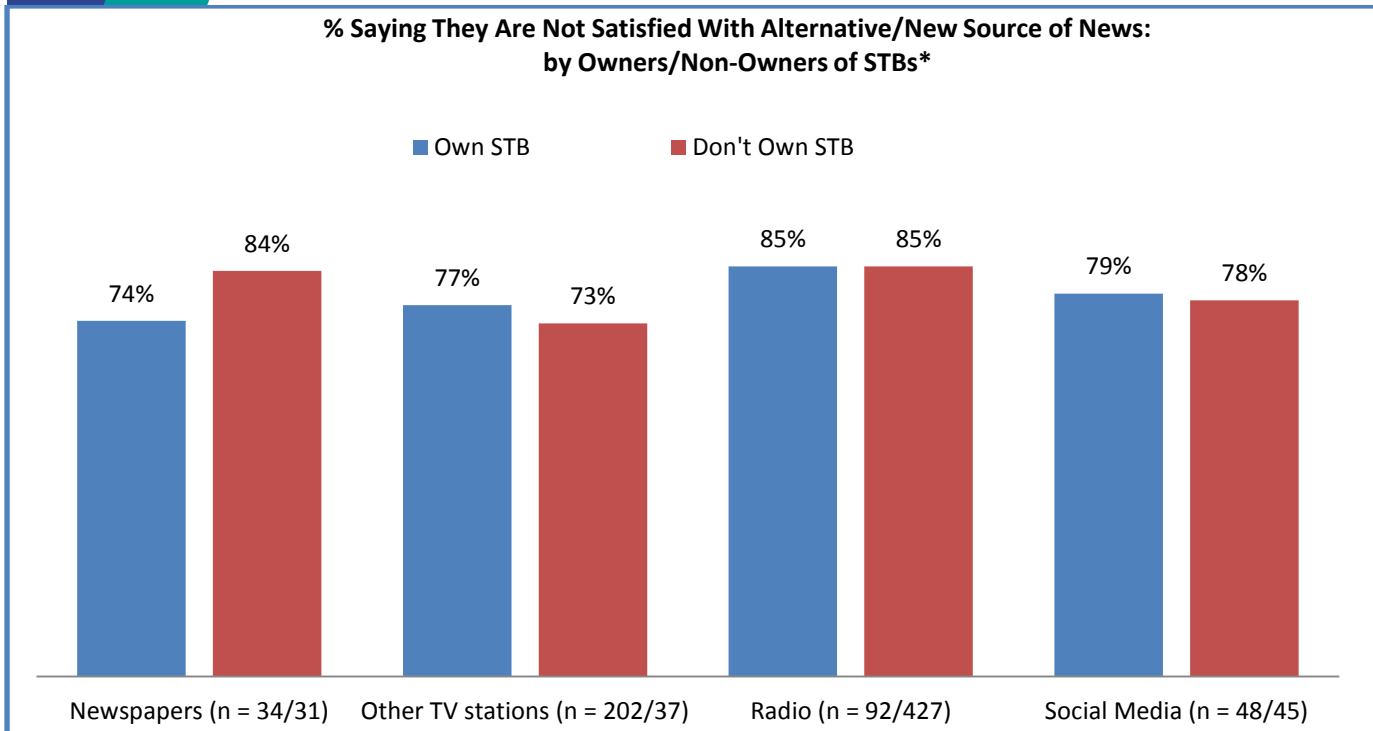
The advantage enjoyed by those already possessing STBs is clearly evident, however, with nearly ten times as many of them able to continue accessing news via television as compared to those without these devices (58% vs. 6%). On the other hand, this figure (58%) leaves a very substantial minority (42%) who, by virtue of their ownership of STBs, are accessing other TV channels for news yet are “not satisfied” with the content they provide. For radio, the contrast in the opposite direction is somewhat less stark, with about three times as many of those without STBs depending upon this medium for news as do STB owners (73% vs. 26%).

### Main Source of Information Since Saturday Switch-Off



### Kenyan dissatisfied with the new/alternative source of news

Whether owners of STBs or not, the vast majority of television owners are not satisfied with their new main source of news/information. Such dissatisfaction ranges from 73% of those without STBS with regard to what other TV stations offer, to a high of 85% of both owners and non-owners of STBs with regard to radio.



**\* Note the variation in base numbers for owners/non-owners of STBs for each “new main source of information”**

### **Methodology: Computer Aided Telephonic Interviewing (CATI)**

- Target respondents for this survey was Kenyans aged 18 years and above
- The respondents were television owners
- The sample size was 932 TV owners distributed across the country
- Data was collected through telephonic interviews
- The Fieldwork dates for this survey was 17 – 18<sup>th</sup> February 2015
- Ipsos funded the survey

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