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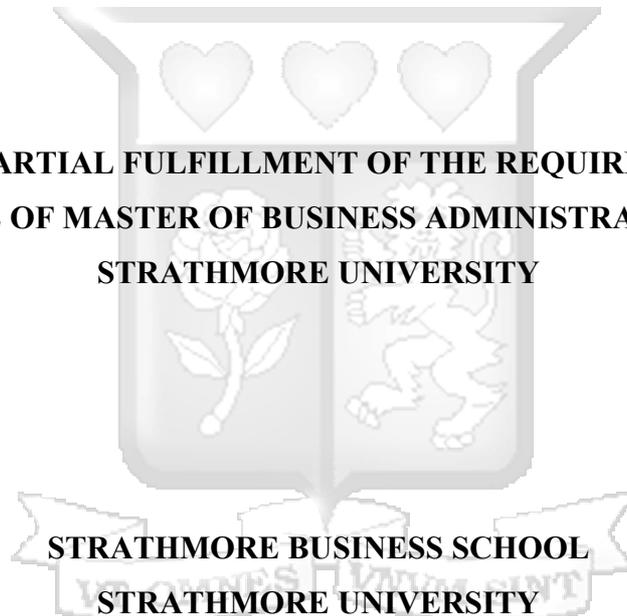
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**FACTORS INFLUENCING THE VIEWERSHIP OF LOCAL TELEVISION
CONTENT IN KENYA: A CASE OF NAIROBI COUNTY**

BY

KILONZO NDANU (MBA/76842/13)

**SUBMITTED IN PARTIAL FULFILLMENT OF THE REQUIREMENTS FOR THE
DEGREE OF MASTER OF BUSINESS ADMINISTRATION AT
STRATHMORE UNIVERSITY**



NAIROBI, KENYA

March, 2016

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KILONZO NDANU

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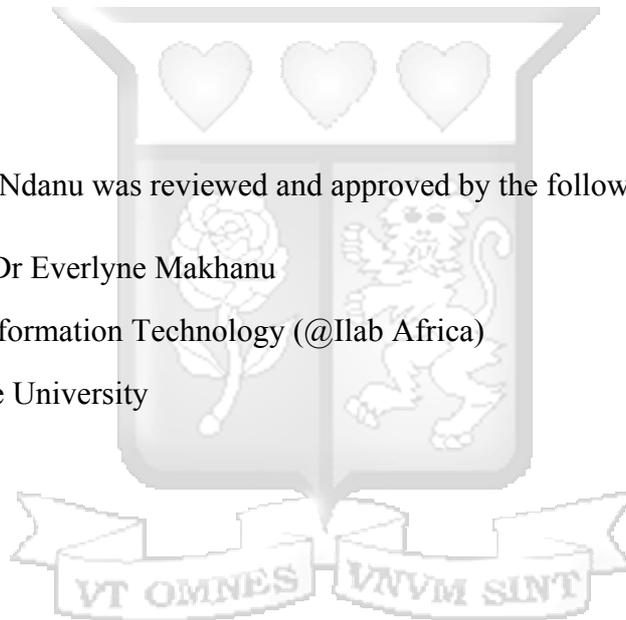
APPROVAL

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DEDICATION

This dissertation is dedicated to my parents, for their inspiration and Love. Secondly, to my husband for his support, encouragement and love. Thirdly, to my brother for his words of encouragement. All in all to God, the Author and Finisher of my Faith.



ACKNOWLEDGEMENT

I would like to express my sincere gratitude and appreciation to the entire department of Strathmore Business School and fellow colleagues who have contributed their time towards the completion of my dissertation. Secondly, I would like to thank my supervisor, Dr. Everlyne Makhanu for her cooperation, sacrifice, assistance and valuable contribution that she made in the successful completion of my Project. Finally, I would like to thank the panelists for their input, diligence and support.



ABSTRACT

This study's main aim was to determine factors that influence the viewership of local content in Kenya. Companies are interested in knowing about consumer preference towards their products because attitudes influence consumers' purchase and consumption intentions. By measuring the factors that influence viewer's preferences, television stations can develop marketing strategies that are responsive to customer's needs and wants thus gaining a competitive advantage. The study adopted a descriptive survey research design and the population for this study was 3,138,295 people living in Nairobi. Using multistage stratified random sampling a sample size of 385 individuals was surveyed, and this study managed to get 120 responses, which were analyzed. A semi-structured questionnaire was used in the data collection and analyzed using descriptive statistics methods such as the frequencies, means and the standard deviations. The findings revealed that a positive relationship exists between viewership of local TV content and the following independent variables: Content quality, consumer perceptions and demographics while a negative relationship exists between viewership of local TV content and distribution platforms. The study recommended duplication of this study in other areas in Kenya particularly rural areas to look at more factors like the effects of culture on viewership of local TV content.

Key words: *Local content, Viewership, Marketing strategies, Distribution channels, Government policies*



Table of Contents

Declaration.....	i
Dedication.....	ii
Acknowledgement.....	iii
Abstract.....	iv
Table of Contents.....	v
List of tables.....	viii
List of figures.....	ix
List of abbreviations.....	x
Definitions of terms.....	xi
CHAPTER ONE: INTRODUCTION.....	1
1.1 Background of the Study.....	1
1.2 Problem Statement.....	3
1.3 Research Objectives.....	4
1.4 Research Questions.....	4
1.5 Significance of the study.....	4
1.6 Organization of the study.....	5
CHAPTER TWO: LITERATURE REVIEW.....	6
2.1 Introduction.....	6
2.2 Local content.....	6
2.3 Theoretical frame work.....	6
2.4 Factors influencing the viewership of local content.....	8
2.4.1 Viewers Demographics and the viewership of local content.....	8
2.4.2 Content quality on the viewership of local content.....	9
2.4.3 Content distribution platforms to the viewership of local content.....	10
2.4.4 Consumers' perception of local content.....	12
2.5 Conceptual Framework.....	14
2.6 Research gap.....	14
CHAPTER THREE: METHODOLOGY.....	16
3.1 Introduction.....	16
3.2 Research Design.....	16
3.3 Population of the study.....	16
3.4 Sample Design.....	16
3.5 Data Collection.....	17

3.6 Data Analysis	18
3.7 Validity and Reliability	18
3.8 Pilot Test	19
3.9 Ethical Considerations	19
CHAPTER FOUR: DATA ANALYSIS AND INTEPRETATION	20
4.1 Introduction	20
4.2 Descriptive statistics	20
4.3 Presentation of Findings and Analysis	21
4.3.1 Response Rate	21
ANALYSIS ACCORDING TO RESEARCH OBJECTIVES	22
4.4 Viewers' demographics influence on the viewership of local television content.....	22
4.4.1 Respondents' gender	22
4.4.2 Age of the respondents.....	23
4.4.3 Working status	24
4.5 Content Quality and its influence on the viewership of local television content.....	24
4.6 Content distribution platforms and influence on the viewership of local TV content.....	27
4.6.1 Set top boxes.....	27
4.6.2 Pay a monthly fee to watch TV.....	27
4.6.3 Set top distribution companies and channels watched.....	28
4.7 Consumers' perception of local content and viewership of local television content.....	29
CHAPTER FIVE: DISCUSSIONS, CONCLUSIONS AND RECOMMENDATIONS .31	
5.1 Introduction.....	32
5.2 Discussions	32
5.2.1 Consumer demographics and the viewership of local television content.....	32
5.2.2 Does the quality of local content affect the viewership of local television content?.....	32
5.2.3 The effects of distribution platforms on viewership of local television content?.....	33
5.2.4 Consumer perceptions of local content viewership of local television content?	34
5.3 Conclusions.....	34
5.3.1 Viewers' demographics influence the viewership of local television content.....	35
5.3.2 To investigate if content quality influences the viewership of local television content.	35
5.3.3 Content distribution platforms influence the viewership of local television content	36

5.3.4 Consumers’ perception of local content and influence on the viewership of local TV content..... 36

5.4 Recommendations, Limitations and areas of further studies 37

5.4.1 Recommendations..... 37

5.4.2 Limitations 37

5.4.3 Areas of Further Studies 37

References..... 39

APPENDIX I: INTRODUCTION LETTER 43

APPENDIX II: QUESTIONNAIRE..... 44



List of tables

Table 1.1: The 16 basic desire or motivations and the associated joys	Error! Bookmark not defined.
Table 2.1: Distribution of people based on their gender, location and education status	9
Table 3.1: Showing percentage distribution of people in Nairobi.....	17
Table 4.1: Descriptive Statistics	20
Table 4.2 Response Data.....	21
Table 4.3: Respondents' gender.....	22
Table 4.4: Inter- Correlation Matrix showing respondents' gender	23
Table 4.5: Age of respondents	23
Table 4.6: Respondents' working status	24
Table 4.7: Content quality and viewership of local content	25
Table 4.8: Correlation between Content quality and viewership of local content.....	26
Table 4.9: If they owned a set top box or not	27
Table 4.10: Pay a monthly fee to watch TV or NOT	28
Table 4.11: Correlation between Set top distribution companies and channels watched.....	29
Table 4.12: Perception of consumer's about local content.....	29
Table 4.13: Correlation between Consumers' perception of local content and its influence on the viewership of local television content.....	30
Table 4.14: Characteristics of Nairobi TV Audience	31

List of figures

Fig. 2.1: Diagram showing the factors that influence consumer behaviour 7

Fig 2.2: Showing the relationship between independent and dependent variables..... 14

Figure 4.1: Distribution of the responses..... 22

Figure 5.1: Summary of factors influencing viewership 35



LIST OF ABBREVIATIONS

CCK:	Communication Commission of Kenya
CMS:	Centre for Media Studies
DTT:	Digital Terrestrial Television
DTV:	Digital television
FCC:	Federal Communications Commission's
KANU:	Kenya African National Unity
KBC:	Kenya Broadcasting Corporation
KP&TC:	Kenya Posts and Telecommunications Corporation
NMG:	Nation Media Group
RMS:	Royal Media Services
SABC:	South African Broadcasting Corporation
SGL:	Standard Group Limited



DEFINITIONS OF TERMS

Consumer behaviour: The many reasons whether situational, personal, social or psychological why people purchase certain products, when they buy them, how they buy them, their use and finally disposal.

Local TV content: A television program made by a television station or independent television producer for broadcast only within the station's transmission area or television market and in this case Kenya. It can also mean content that is intended for a specific local audience, as defined by its geographic location, culture or its language.

Marketing: Is the communication of value of a product, service or to customers, for the purpose of promoting or selling that product, service or brand. From a societal point of view, marketing is the link between a society's material requirements and its economic patterns of response. Marketing satisfies these needs and wants through exchange processes and building long term relationships.

Behaviour: Is the attitude whether positive or negative that a person forms towards an object and it is often influenced by both personal and environmental factors (Behaviour=Personal factors+environmental factors).

Content distribution platforms: These are the media through which materials developed by content producers are distributed to the end users in form of analogue, digital, or physical media. A good example is MultiChoice, GOtv, StarTimes, ZUKU, etc. The distribution platforms can either be free to air or pay TV.

Consumers' perception: Perception is a mental process, whereby an individual selects data or information from the environment, organizes it and then draws significance or meaning from it.

Demographics: Statistical data relating to the population and particular groups within it and includes age, gender, education, religion etc.

Content quality: Relates to quality of sound, theme, and picture quality.

CHAPTER ONE: INTRODUCTION

1.1 Background of the Study

According to Munyoki & Odudoh (2012) the liberalization of airwaves in Kenya in the 1990s by the Communication Commission of Kenya (CCK) has led to the emergence of many television stations that are competing for viewership. Consequently, the viewers in Nairobi are exposed to different stations ranging from free-to-air stations such as state owned Kenya Broadcasting Corporation (KBC) to Pay TV stations (e.g. DSTV). The existence of alternatives demands preference and choice of television stations based on the viewer's unique and diverse needs. Studies based on the "uses and gratifications" paradigm have shown that people have different motivations and needs that lead them to expose themselves to different media contents.

Since the early 1970s, research in this tradition has produced studies of media use in order to gratify the audience's social and psychological needs (Abelman, 1987). However the viewer decision making process is influenced by factors that can be measured by the viewer's choice of channels, programs and the number of repeat visits or the level of awareness. By measuring the factors that influence viewer's preferences, television stations can develop marketing strategies that are responsive to customer's needs and wants thus gaining a competitive advantage. Companies are interested in knowing about consumer preference toward their products because attitudes influence consumers' purchase and consumption intentions. Although a consumer may have a favorable attitude toward a product, it does not necessarily translate into purchase behavior. This is because liking one product does not preclude the possibility that another product is liked even more. For this reason attitudes are sometimes measured in form of preferences. Preferences represent attitude toward one object in relation to another.

To understand the dynamics and the factors in play with regards to television viewership, the sensitivity theory (Reiss 2000b), can be used to infer conclusions. The sensitivity theory is anchored to the understanding of human behaviour. It postulates that people go through life seeking to experience 16 basic desires, or motives, and the associated joys. Individually, they tend to concentrate on those that are strongest and most highly valued and ignore stimuli that

are irrelevant to their basic motives. This theory is called sensitivity theory or the theory of 16 basic desires (Reiss, 2000b).

There are 16 recognised basic desires in sensitivity theory. Individuals differ in how we prioritise our basic desires, thus resulting in different kinds of individuals and personalities (Reiss, 2004a). According to Bruno (2002), personality plays an important role in almost everything we do. Personality is like a psychological fingerprint, where an individual's personality is unique and one of its own. People behave according to their respective personality. Psychologists consider individual's preference of activities, persons or objects as an important aspect of personality. On this note, a person often judge matters spontaneously and unintentionally by the quality that he values most (Cohen, 1966).

Everybody is motivated by each of the 16 basic desires, but to different extends. A Reiss Desire Profile is a rank for individual's basic desires, a display of an individual's 16 sensitivities. For example, a military officer might have a profile which highly values the basic motives of power, honour and physical strength while a painter may have a high value for desire profile which covers romance, tranquillity and independence (Reiss, 2004b). The 16 basic desires are considered to be elemental end motives. Sensitivity Theory holds that many human motives can be reduced to combinations among the 16 basic desires (Reiss, 2004a).

The experience of a basic desire produces joy and a degree of joy is experienced depending on the basic desire experienced. For example, when we have a desire for knowledge, and obtain it, we experience the joy of wonderment. According to Sensitivity Theory, joys differ in kind and people seek to maximise joys that are most important to them according to their Desire Profile (Reiss and Wiltz, 2004). The 16 basic desire or motivations and the associated joys are as in Table 1.1.

Table 1: The 16 basic desire or motivations and the joys associated.

Motive Name	Motive	Joy
Power	Desire to influence (including leadership)	Efficacy
Independence	Desire for autonomy	Freedom
Curiosity	Desire for knowledge	Wonderment
Acceptance	Desire for approval	Self-confidence
Order	Desire to organize (including desire for ritual)	Stability
Saving	Desire to collect	Ownership
Honour	Desire to obey a traditional moral code	Loyalty
Idealism	Desire to improve society (including altruism, justice)	Compassion
Social Contact	Desire for peer companionship (including desire to play)	Fun
Family	Desire to raise own children	Love
Status	Desire for prestige (including desire for attention)	Self-importance
Vengeance	Desire to get even (including desire to win)	Vindication
Romance	Desire for sex (including courting)	Lust
Eating	Desire for food	Satiation
Physical Exercise	Desire to exercise muscle	Vitality
Tranquillity	Desire for inner peace (prudence, safety)	Safe, relaxed

Source: Reiss (2004a)

Past research has not been able to clearly determine those factors. For instance, Mwaba, (2008) sought to establish media consumer market segmentation practices used by television stations in Kenya but the study did not establish the factors that influence viewers' decision making in preference of a Television station. On the other hand, Mwabu (2009) surveyed viewers' perceived quality of Television stations in Kenya but apart from perceived quality there are other factors that influence preference of one television station to another. Therefore this study will Address The Other Factors That Influence Viewers' Decision Making In Preference Of A Television Station Namely Content Quality, Viewers' Demographics, Consumers' Perceptions Of The Local Content And Distribution Platform (Free To Air And Pay TV).

1.2 Problem Statement

On the 7th of October 2014, The Communications Authority of Kenya (CA), through Mr. Francis Wangusi, its Director General, directed television stations operating in Kenya to air 40% local content or risk penalties from the authority. According to the expectations by the Communication Authority of Kenya, Media houses should meet percentage levels of local content aired which has been set on yearly terms; 40% by June 2015, 50% by June 2016 and 60% by June 2018.

With the government's directive for TV stations to air local content in Kenya, producers are working overtime to meet this demand. However the products have to be tailor made to fit the consumer's needs. Additionally the industry lacks adequate information on the variables that affect the viewership of local content in Kenya. This forms the basis of this study and the results generated here will go a long way in shaping the production industry in Kenya.

1.3 Research Objectives

The general objective is to investigate the factors influencing the viewership of local content in Kenya with a specific focus on Nairobi County.

The specific objectives are:

1. To explore whether viewers' demographics influence the viewership of local television content.
2. To investigate if content quality influences the viewership of local television content.
3. To determine whether content distribution platforms influence the viewership of local television content.
4. To investigate if consumers' perception of local content influences the viewership of local television content.

1.4 Research Questions

In the light of the objectives mentioned above, this study will seek to address the following questions:

1. Is there a relationship between consumer demographics and the viewership of local television content?
2. How does the quality of local content affect the viewership of local television content?
3. Is there a relationship between distribution platforms and the viewership of local television content?
4. How do consumer perceptions on local content affect the viewership of local television content?

1.5 Significance of the study

This study seeks to explore and examine the factors that contribute directly or indirectly towards the level of viewership of local television content. The findings of this study will allow stakeholders i.e. policy makers, content producers, marketers and distributors a deeper insight on the consumer's needs. This will go a long way in influencing policy, allow

producers to customize product and marketers to develop tailor made marketing concepts for maximum effect.

1.6 Organization of the study

The rest of this study is organized as follows: Chapter 2 provides a comprehensive and critical review of literature relevant to the topic of local content under the factors listed in objectives. In chapter 3, the research design and approach of inquiry that grounded the study are discussed. In chapter 4, detailed findings of the study are discussed. In chapter 5, conclusions and recommendations are provided. The recommendations for action and for further studies were also discussed.



CHAPTER TWO: LITERATURE REVIEW

2.1 Introduction

This chapter provides a review of literature relevant to the topic of local content under the factors listed in objectives. The theoretical and conceptual frameworks are also explained.

2.2 Local content

Local content is defined as content that is intended for a specific local audience, as defined by its geographic location, culture or its language (Thussu, 2007). The writer further states that local content “broadly means the processing and diffusion of information customized in any suitable format to fit the needs of a specific community”. The liberalization of airwaves in Kenya in the 1990s by the communication commission of Kenya has led to the emerging of many television stations that are competing for viewership. Consequently, the viewers (especially in Nairobi) are exposed to different stations ranging from free-to-air stations e.g. state owned Kenya Broadcasting Corporation (KBC) to Pay TV stations (e.g. DSTV) in addition to alternative sources of information and entertainment such as the internet (Blackwell et al., 2006). The growth of television industry has led to emergence of several private and public television stations, growing from a mere 2 Television Stations in 1990 to the current 54.

The existence of alternatives demands preference and choice of television stations based on the viewer’s unique and diverse needs. Like all consumers of other products, the viewer decision making process is influenced by both internal and external factors that can be measured by the viewer’s choice of channels, programs and the number of repeat visits or the level of awareness (Munyoki & Kirigo, 2011). By measuring the factors that influence viewer’s preferences, television stations can develop marketing strategies that are responsive to customer’s needs and wants thus gaining a competitive advantage.

2.3 Theoretical frame work

Two major theories are evident in this study. These are the supply and demand theory and the marketing theory. In micro economics, supply and demand is an economic model of price determination in a market (Sloman, 2011; Mankiw, 1990). It concludes that in a competitive market, the unit for a particular good will varies until it settles at a point where the quantity demanded by the consumers will equal the quantity supplied by producers, resulting in an economic equilibrium for price and quantity (Sloman, 2011; Carbaugh, 2006). Marketing on

the other hand is the communication of value of a product, service or to customers, for the purpose of promoting or selling that product, service or brand. From a societal point of view, marketing is the link between a society's material requirements and its economic patterns of response (Munyoki & Odudoh, 2012). Marketing satisfies these needs and wants through exchange processes and building long term relationships. However in this context, the marketing theory is better placed in helping in drawing conclusions. Because it doesn't focus solely on the economic factors that affect supply and demand unlike the former theory, but encompasses also the other aspects that are in play such as viewer perception (Munyoki & Odudoh, 2012).

According to Day (1983) the discipline of marketing is constantly being reshaped by internal and external forces. He continues to state that, seldom have the pressures for change been as compelling as in the present period of ferment, the most obvious forces stem from developments in strategic management and planning, plus substantial restructuring of many traditional markets into networks of long term cooperation. These developments represent significant challenges to the accepted paradigms within the field of marketing. The effects of being magnified because they frequently have a counterpart in growing dissatisfaction with the restrictive view of marketing that characterizes much of the present theory and research in the field. Marketing theory also suggests that understanding consumer behavior is the first step in identifying those stimuli that affect the decision-making process (Munyoki & Odudoh, 2012).

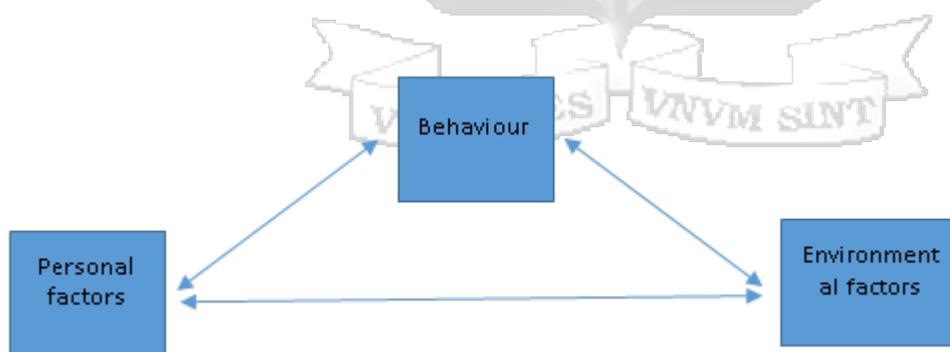


Fig. 2.1: Factors that influence consumer behaviour (Munyoki & Odudoh, 2012)

2.4 Factors influencing the viewership of local content

2.4.1 Viewers Demographics and the viewership of local content

A study conducted by CMS ENVIS Centre, Centre for Media Studies (CMS, 2011) to know the social and environmental impact of TV and radio programs in India has shown that TV is still a strong and significant means of communication among all sections of the society irrespective of age, class and education. Their study has shown that viewers mostly prefer entertainment programs. On the other hand, populations around the world have learnt to see watching the news as a 'civic duty' with all the ambivalences that implies (Hagen 1994). In exchange for dutiful citizenship, audiences were encouraged to feel that they should insist on professional craftsmanship, and quality standards in television news programs. Such encouragement was double-faced. It suggests that audiences were in a reciprocal relationship with television producers and could have demands. In reality, the ideology of professionalism enclosed television production within the broadcasting institutions. For example, various forms of volunteer and open access television experiments floundered as they were felt to 'lack quality', both by viewers and, for instance, by local authorities (Valck & Teurlings, 2013).

Programmers are concerned about viewer demographics because they affect public TV in several important ways (Eisenlohr, 2012). Demographics help determine the size of a TV station's audience. A station whose schedule includes strong programs with different audiences from various age groups has a larger audience than a station that only successfully targets a few demographics (Ashuri, 2007). Total ratings (Gross Rating Points) increase when a station's schedule arranges programs with "like" demographics together, because this increases the possibility of audience flow from one program to the next. Viewer demographics also influence community support levels for membership, since some demographics are more likely to give money to a station than others (Valck & Teurlings, 2013).

According to (Esteves-Sorenson & Perretti, 2012) basic demographics like age and sex, because of life cycle implications, tell us a lot about TV viewing. For instance the study goes on to suggest that, older people have more time to watch TV than younger people and that women watch more television than men do. The study also reveals that, on public TV, women tend to like drama, film and culture more than men and that men are more likely to view science, nature and war documentaries. Older people prefer news/talk and nostalgic

music; young people like comedy, science, film documentaries and how-tos. In Kenya these variables are also in play. According to the 2009 census, in the administrative area of Nairobi, 3,138,295 inhabitants lived within 696 km² (269 sq mi).

Table 2.1: Distribution of people based on their gender, location and education status

Sex	Total	Employed	Seeking Work / No Work Available	Economically Inactive	Unclassified
KENYA					
Male	16,052,205	8,406,866	1,160,959	5,636,871	847,509
Female	16,426,365	7,379,465	1,025,923	7,187,753	833,224
Total	32,478,570	15,786,331	2,186,882	12,824,624	1,680,733
NAIROBI					
Male	1,385,991	848,679	111,317	357,700	68,295
Female	1,327,735	562,550	131,955	552,949	80,281
Total	2,713,726	1,411,229	243,272	910,649	148,576
NAIROBI WEST					
Male	306,514	184,059	24,076	82,974	15,405
Female	287,343	117,695	27,495	123,961	18,192
Total	593,857	301,754	51,571	206,935	33,597
NAIROBI EAST					
Male	505,613	319,400	36,855	125,055	24,303
Female	486,416	214,053	41,791	202,379	28,193
Total	992,029	533,453	78,646	327,434	52,496
NAIROBI NORTH					
Male	462,536	276,090	44,239	120,904	21,303
Female	444,671	182,133	55,074	182,267	25,197
Total	907,207	458,223	99,313	303,171	46,500
WESTLANDS					
Male	111,328	69,130	6,147	28,767	7,284
Female	109,305	48,669	7,595	44,342	8,699
Total	220,633	117,799	13,742	73,109	15,983

Source: Census, (2009)

2.4.2 Content quality on the viewership of local content

Access to premium content is a serious bottleneck and a source of market power (Ashuri, 2007). Barriers to accessing content can arise from the integration of content owners and broadcasters, exclusive contractual arrangements or from vertical foreclosures by a dominant firm. Premium content may also have an impact on competition in other non-TV markets (Ashuri, 2007). For instance, in triple or quadruple play markets, content can increase the attractiveness of the package (Ashuri, 2007). Market structure analysis is essential to address challenges relating to access to content. A key issue is that a downstream broadcasting service provider may be able to leverage its market position to gain power in an upstream market for content. This upstream buyer's power would enable the exercise of additional market power in the downstream market (Durante & Knight, 2012). In the scenario of a competitive downstream market, the structure of the upstream market has an important impact on market outcomes. Moreover, the exclusive content strategy can lead to its fragmentation across platforms (Mast, 2009). To address this problem, some countries (e.g. Singapore) have imposed on subscription TV licensees a statutory obligation to cross-carry the exclusive content on the other subscription TV licensee's platform in its entirety and in an unmodified and unedited form (Mast, 2009). In some countries (e.g. Egypt) piracy has decreased the value of the premium content (Polan, 2010). When critics decry the current state of our public discourse, one reliably easy target is television local news. It's too dumbed

down, they say; it's no longer news but entertainment, celebrity-obsessed and vapid. The critics may be right. But, as Charles L. Ponce de Leon explains in 'That's the Way It Is, TV' news has always walked a fine line between hard news and fluff (O'Brien & Johnson, 1976).

Alhassan (2013) has shown in his study about the preference for Television Stations among inhabitants of Akropong Akuapem, Ghana that TV viewers in Ghana watch television for the purpose of education, relaxation, entertainment and as aid study/work. He has revealed in his study that the credibility of television station, clear reception of programs, station heritage, news coverage play an important role in winning viewer's hearts. Onah and Anyaruvu (1998) in their study examined viewer preference for two TV stations in Nigeria (ABS-TV and N.T.A.) with a purpose to know the most preferred of the two stations. Their study revealed ABS-TV as the most preferred station owing to its clarity and quality of presenters. They have further revealed that NTA was liked by the viewers for lesser breakdowns. Their study showed that viewers give first preference to entertainment programs whereas informative programs are their second choice.

According to Gichagi (2011), there has been a constant concern over the balance and quality of content from KBC. But, generally, the media in Kenya, with KBC included, has been instrumental in informing and educating the public over the years. The struggle for an expanded democratic space in the 1980s and 1990s benefited from the media's enormous support, sometimes at very high costs. While the government had maintained a tight grip on the media back then, the existing outlets braved the odds to take on weighty social, political and economic issues, even if only sporadically. This partly accounts for the high levels of public confidence in the media. A 2010 survey by Ipsos Synovate, found that the majority of Kenyans trust media more than other public institutions including the judiciary, police and parliament.

The quality of content produced is varied. The difference in quality between the mainstream and alternative television stations is not replicated with regard to content; the general trend is for stations to emulate, or even replicate, popular material from the competition. The result is that Kenyan domestic television is dominated by foreign material. This is however subject to validation by the study.

2.4.3 Content distribution platforms to the viewership of local content

Although digitalization has significantly reduced barriers in access to transmission facilities, competition concerns have not ceased to exist (Wilbur, 2008). For instance, a regulatory

decision to limit the distribution of Digital Terrestrial Television (DTT) signal to only one technology may prevent TV broadcasters from changing network operators or making use of other transmission technologies, and deprive third party network operators of opportunities that the digital switchover provides (Bronnenberg, DubÉ & Mela, 2010) Broadly speaking, there are five basic roles in a content distribution value chain or ecosystem.

These are: Content producers develop original material for distribution across analogue, digital, or physical media. Although the most valuable content is generally commercially produced, the largest share of material available online is now generated by end-users (i.e. user-generated content)(Smith & Telang, 2009). Distributors license content and store, aggregate, package or manipulate it for availability to end-users. Networks provide the communication links to carry content to end-users. These can be satellites, antennas or wired networks (Wilbur, 2008). A producer or a distributor may own a network (or vice versa), but the functions of moving bits and selling content are conceptually distinct. Hardware vendors manufacture end-user devices to display, store, and manage content (Chipty, 2001).

The hardware involved may be a general-purpose platform such as a personal computer or smartphone, or it may be a specialized device such as a television, video recorder or set-top box. Supporting services such as advertising, program guides, search, analytics and tools facilitate revenue-generating business opportunities around digital content (Neuman, 2010). Given that professional content depends on revenue generated from practices such as advertising and subscription, these ancillary functions are key elements of common business models, though may be complimented by income from sources ranging from public funding to revenue associated with must-carry requirements (Valck & Teurlings, 2013).

According to Githaiga (2011) the media in Kenya has grown tremendously in the last two decades more or less in parallel with the expansion in democratic space, which in itself evokes the close linkage between media and democratic tenets. The Kenyan pay-TV market is still in its infancy, with subscriber penetration at only 8% in 2012. However, as competition increases, this will rise to 15% by 2017. The total of 232 000 pay- TV households at the end of 2012 is expected to more than double to reach 531 000 by the end of 2017, a CAGR of 18%. Subscription revenues totalled US\$59 million in 2012 and will reach US\$111 million in 2017, a CAGR of 13.6%. Subscriber growth will be driven by new players like Wanachi and Zuku, which are challenging the incumbent MultiChoice by diversifying their offerings and cutting prices.

In the satellite sector, MultiChoice faced significant competition in Kenya from new entrant GTV from mid- 2007 until early 2009 when GTV went bankrupt. Since then, MultiChoice's Kenyan subscriber base has been increasing substantially. Further significant competition is now coming from Chinese-owned pay-TV provider StarTimes, which is looking to pay-DTT services to erode MultiChoice's strong position in the market. StarTimes is offering specific deals to former subscribers of defunct services like GTV and has been successful in generating subscriber scale. MultiChoice launched its own pay-DTT service, GOtv, in 2011. In 2012, TV accounted for 35.3% of all ad spend in Kenya. But, with the TV sector expected to grow in strength over the next five years – assisted by the emergence of a new urban middle class with money to spend on consumer goods – this share will increase to 45.8% by 2017.

Having generated TV advertising revenues of US\$359 million in 2012, the period between 2013 and 2017 will see consistent revenue growth, with net TV advertising revenues set to reach US\$754 million in 2017, a CAGR of 16%. Thus current trends in technological convergence, especially digitalization, point to the possibility of communication media being available on a single multipurpose device or platform. The concept of convergence is not well entrenched, or understood, within traditional Kenyan media. However the rise of digital platforms presents enormous opportunities to better inform citizens and opens greater access to information. Given the desire to cut costs, it is inevitable that media organizations will embrace the reality of convergence journalism in the foreseeable future.

2.4.4 Consumers' perception of local content

Perception is a mental process, whereby an individual selects data or information from the environment, organizes it and then draws significance or meaning from it (Anderson, 2002). Perceived fit is an attitudinal measure of how appropriate a certain channel of distribution is for a specific product. Ashuri, (2007) found that consumer's perception of the fit between a service/product and a channel is very influential in determining whether they will consider using that channel for a specific service. In fact, perceived fit was found to be more important than consumer's preferences for the distribution method or service.

Solomon and Stuart (2000) stated that perception is the process by which people select, organize, and interpret information from the outside world. People receive information in the form of sensations by sensory receptors; eyes, ears, nose, mouth and fingers. People interpret the sensations they receive by their past experiences. The perception process is very

important for marketers. When an advertisement is created, although consumers notice it, there is no guarantee that they will perceive as marketers want. Therefore, marketers need to care about the whole process including exposure, perceptual selection and interpretation. Consumer perception theory attempts to explain consumer behaviour by analysing motivations for buying or not buying particular items. Three areas of consumer perception theory relate to consumer perception theory are self-perception, price perception and perception of a benefit to quality of life.

Aaker (2000) assesses that brand awareness plays a vital role in consumer perception especially when their buying pattern is not defined. Product quality has two forms: one is accurate quality and second is expected quality. The actual quality contains the actual benefits achieved from the purchase of product and perceived quality on the other hand contains consumer expectations from product.

Scholars have noted that country-of-origin perceptions and expectations lead to cognitions. It also puts significance on particular products and marketing attributes. These were considered as the factors that could bring affect to the people in the country of where the product or services were marketed (Gary A. Knight, 1999). Price has constantly been a determinant factor on consumers' brand choice when choosing a product or service. It is understood that when a consumer is facing a buying decision for product purchase then he/she is so much concern about the prices of the product and observes prices keenly.

This helps them to maximize their direct utility that they gain from the purchase. However, when consumer faces brand with fluctuating prices and perceived quality levels, they would have to make decision about the preference they make on the basis of attributes of the product (Khasimah, 2007). Consumer preferences of product attribute is different according to product nature as well as its Social and economic nature of consumer (Uusitalo, 2001).

Product attributes are often eye-catching in nature (Vishwanathan and Childers, 1999). The attributes model proposed by (Gwin and Gwin, 2003) posits that consumer preference of product is based on maximizing utility from the product features subject to financial shortage. Choice theory defines that consumer preference based on product features. If these variables are present then consumers normally perceive positive image of product and usage of that product increases. A large number of researches have been done towards store features and images and customer loyalty in various western and European countries (Carpenter and Moore, 2006). However, partial importance has been given to this matter in under developed countries such as Kenya.

2.5 Conceptual Framework

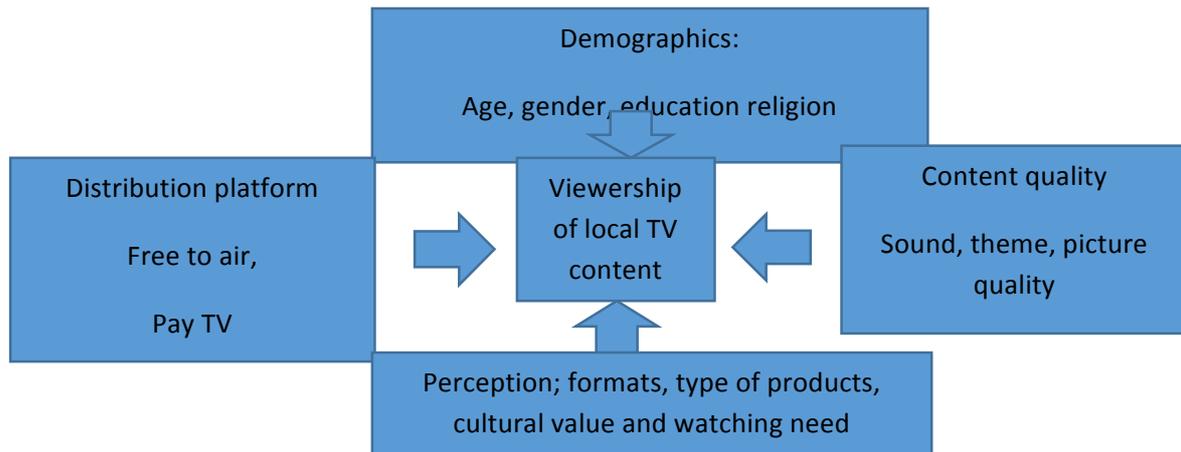


Fig 2.2: The relationship between independent and dependent variables (Researcher 2015)

The independent variables in this study are distribution channels or platforms, consumer perceptions, demographics and content quality. The dependent variable is viewership of local TV content. The indices that will be used to measure the influence of distribution channels are; awareness, ease of use and accessibility. While for consumer demographics; Age, sex, income level, education level and location will form a basis for measurement. In the case of dependent variables, content quality will be measured in terms sound quality, picture texture and compelling script writing.

2.6 Research gap

Consumer usage and buying of any product largely depends on their perception about the product. Perception develops through how effectively a product has been marketed. Firms are putting their best efforts in marketing in order to get customer attention and positive impression on customer's mind (Dickenson, 1994), consumer perception is also identified by the colour, shape, and taste of the product (Weinsblit,1999).

Past research has not been able to clearly determine those factors. For instance, Mwaba, (2008) sought to establish media consumer market segmentation practices used by television stations in Kenya but the study did not establish the factors that influence viewers' decision making in preference of a Television station. On the other hand, Mwabu (2009) surveyed viewers' perceived quality of Television stations in Kenya but apart from perceived quality there are other factors that influence preference of one television station to another. Therefore

this study will fill in this gap by addressing the other factors that influence viewers' decision making in preference of a Television station namely content quality, viewers' demographics, consumers' perceptions of the local content and Distribution platform (free to air and pay TV).



CHAPTER THREE: METHODOLOGY

3.1 Introduction

This chapter gives an explanation of the methodology and procedures that was used during the course of the study. These include; the research design, the sampling method and procedure, the composition of the study population, the sample size and how the sample size was reached. This section discusses the methods of data collection and the tools that were used, the mode of data analysis and the dissemination method that were adopted at the end of the data collection and analysis process.

3.2 Research Design

This study adopted a descriptive survey research design. The qualitative data collected shed light on the usage and consumption of TV as well as gave an in-depth understanding of the local TV industry, provided insight into consumer perceptions and attitudes towards local TV production in Nairobi. According to Cooper and Schindler (2003), a descriptive study is concerned with finding out the what, where and how of a phenomenon. Descriptive research design was chosen because it enabled the researcher to generalize the findings to a larger population. In addition, descriptive research design according to Saunders et al. (2012) clearly defines the focus of the research study and comes up with the right measures for the problem under investigation.

3.3 Population of the study

According to the population census 2009, there are 3,138,295 people living in Nairobi. At the time of the study, Nairobi West had a population of 352,227 males, 332,538 females, total 684,765. While Nairobi East had a population of 582,554 males and 561,862 females, total 1,144,416. Nairobi North had a population of 545,701 males and 516,385 females, total 1,062,086. Lastly Westland's had a male population of 124,748 and 122,354 females, total 247,102.

3.4 Sample Design

The study adopted multi stage random sampling where, the sampling was carried out in stages using smaller and smaller sampling units at each stage (Yount, 2006). This sampling technique was used because the sample frame was composed of a very heterogeneous population and the study was keen on determining tastes and preferences. By using this

method, the study was able to isolate a representative sample that answered the research objectives set. A sample of primary units was selected and then a sample of secondary units was selected within each primary unit. In the context of this study, Nairobi was divided into four clusters i.e. Nairobi East, North, West and Westland's and their total population of 3,138,295 formed the primary unit. Using multistage stratified random sampling a sample size of 385 individuals was surveyed. A representative sample of 385 individuals was then randomly picked and shared across the clusters based on their individual population ratios i.e. as shown below. This formed the secondary units in this context.

Table 3.1: Showing percentage distribution of people in Nairobi

Nairobi West	684,765	22%
Nairobi East	1,144,416	36%
Nairobi North	1,062,086	34%
Westland's	247,102	8%

Source: (County, Census 2009)

Sampling formula

- N : number of primary units in the population
- M_i : number of secondary units in the i th primary unit
- $y_i = \sum_{j=1}^{M_i} y_{ij}$
- population total : $\tau = \sum_{i=1}^N \sum_{j=1}^{M_i} y_{ij}$
- $\mu = \frac{\tau}{M}$ where $M = \sum_{i=1}^N M_i$
- n : number of primary units selected in the first stage
- m_i : number of secondary units selected in the second stage

3.5 Data Collection

During the data collection exercise, qualitative data was collected via a questionnaire survey, key Informant interviews, secondary literature review and stakeholder identification and discussions. A semi structured questionnaire was used in the data collection. This study attempted to capture possible negative and positive, direct and indirect impacts as well as intended and unintended factors that determine the viewership of local television content in Nairobi County.

Questionnaires (Appendix II) were used because the tool allowed for large amounts of information to be collected for the sampled respondents and the data collected is easily quantified and analysed more scientifically via software packages. While, the interview

schedule was used to tackle targeted questions that affect policy (Blaikie, 2006). The questionnaire had questions on consumer demographics, understanding and consumption of local content and knowledge and use of the available distribution channels.

3.6 Data Analysis

The data was collected using coded tools and analyzed using IBM SPSS and descriptive statistics techniques were used to analyze quantitative data. The Person correlation technique was used to establish the relationship between the dependent and independent variables (Hauke & Kossowski, 2011). The data was edited for correctness and coding of the variables was done using the likert scale. This data was then analyzed using descriptive statistics methods such as the frequencies, means and the standard deviations. In addition, the summary of the basic logic of ANOVA is the discussion of the purpose and analysis of the variance. The purpose of the analysis of the variance was to test differences in means (for groups or variables) for statistical significance. The accomplishment was through analyzing the variance, which was by partitioning the total variance into the component that was due to true random error and the components that were due to differences between means.

The Correlation matrix was used to determine the extent to which changes in the value of an attribute (such as content quality) was associated with changes in another attribute (like demographics). The data for a correlation analysis consisted of two input columns and each column contained values for one of the attributes of interest. When the values were greater than 0.5 like in the case of content quality and demographics then the variables are correlated and when values were less than -0.5 like content distribution platforms then the values for are not correlated.

3.7 Validity and Reliability

To ensure validity, the following factors were considered and adhered to. For Instrumental validity, the research ensured that all questions asked were domiciled in the instrument and adequately represent the domain of the variables being measured (Saunders et al., 2012). The instrument used for data collection was fine-tuned to be predictive and also to assure concurrency. For design validity, the research clearly outlined the independent variable and developed appropriate questions to infer conclusions. Similarly this was done for dependent variables to ensure external validity (Mugenda & Mugenda, 2003).

3.8 Pilot Test

Semi structured questionnaires were developed guided by the research objectives. The questionnaires were tested on a pilot sample drawn from all the four clusters in Nairobi County. The study managed to carry out a pilot study on 10 respondents from the desired population in order to test the survey instrument. This helped to validate the questions, remove errors, rectify mistakes and check the general structure of the questionnaire. This was done before proceeding to collect the actual data for analysis. As observed by Cooper & Schilder (2011), the rule of thumb is that 1% of the sample should constitute the pilot test. The questionnaire passed the test since the respondents were able to fill out the questionnaires with ease and within little time. Grammatical errors were rectified.

Data from the pilot sample was not used or included in the final analysis of the study. However the results from the pilot were used to correct weaknesses found in the questionnaire. The research assistants who helped in the collection of data were trained on research skills such as probing, listening and accurate recording. The research assistants were taken through the whole study for them to understand the core of the study.

3.9 Ethical Considerations

This study was authorized at the university level hence considered less risky. In addition, the reasons for the study were explained clearly to the respondents (Easterby-Smith et al., 2008). Thus, throughout the study, the researcher observed high levels of integrity, confidentiality of responses solicited, anonymity of the respondents. Respondents' participation was on voluntary basis.

CHAPTER FOUR: DATA ANALYSIS AND INTERPRETATION

4.1 Introduction

The study sought to investigate factors influencing the viewership of local television content in Kenya. It therefore consists of the data analysis presentation and interpretation of findings. The objectives of the study were to explore whether viewers' demographics influence the viewership of local television content, to investigate if content quality influences the viewership of local television content, to determine whether content distribution platforms influence the viewership of local television content and to investigate if consumers' perception of local content influences the viewership of local television content. Both the primary and secondary data that was used was based on the variables of the study and was intended to meet the objective of the study. Descriptive statistics was used to reduce the data to a manageable size and to provide insights into the pattern of the trend of the data. The descriptive statistics techniques used in the study include range, sum, mean and standard deviations.

4.2 Descriptive statistics

Descriptive statistics was used to reduce the data to a manageable size and to provide insights into the pattern of the trend of the data. The descriptive statistics techniques used in the study include range, sum, mean and standard deviations. They are shown in table 4.1

Table 4.1: Descriptive Statistics

Variables	N	Minimum	Maximum	Sum	Mean	Std. Deviation
VLTC	120	8.26	32.77	192.45	16.0378	7.62930
CQ (Content Quality)	120	1154.84	27813.30	149123.09	12426.9242	9650.97976
CDP	120	4.00	11.00	86.00	7.1667	2.65718
CP	120	.00	1.00	9.00	.7500	.45227
Demographics	120	6.00	15.00	125.00	10.4167	2.90637
Valid N (listwise)	120					

Note: S.Dev = Standard Deviation

VLTC is (Viewership of local television content), CDP is (Content distribution Platforms) and CQ is (Content Quality), CP is Consumers' Perception and Demographics.

As indicated in table 4.9, the Viewership of local television content ranged from 8.26 to 32.77 with an average of 16.0378 and a standard deviation of 7.62930. The mean CQ (Content Quality) was 12426.9242, mean Content distribution Platforms was 7.1667, the mean Consumers' Perception was .7500 and the mean of Demographics was 2.90637.

4.3 Presentation of Findings and Analysis

4.3.1 Response Rate

The research was done by sending out 385 questionnaires out of which 120 of them were received and analyzed (about 31% response) which was considered a success. In addition, it has sufficiently surpassed the minimum threshold sample size of 10% suggested by Gay (2005), 30% considered acceptable by (Stanley & Gregory, 2001; Kothari, 2004, 2011).

Table 4.2 Response Data

		Frequency	Percent
Valid	Responded	120.00	31.00
	Did not Respond	265.00	69.00
	Total	385.00	100.00

Although the researcher would have intended to get 100% response, a response rate of 31% was considered sufficient and representative. In addition, figure 4.1 shows the distribution of the responses across the four regions in Nairobi. Most of the responses (55% or 66) came from Nairobi East while the lowest (9.8% or 11) came from Westlands. Although the study could not attach meanings to the responses received, this might be explained by the fact that Nairobi Westlands has the lowest population while Nairobi East has the highest according to (County, Census 2009).

Distributon of the responses

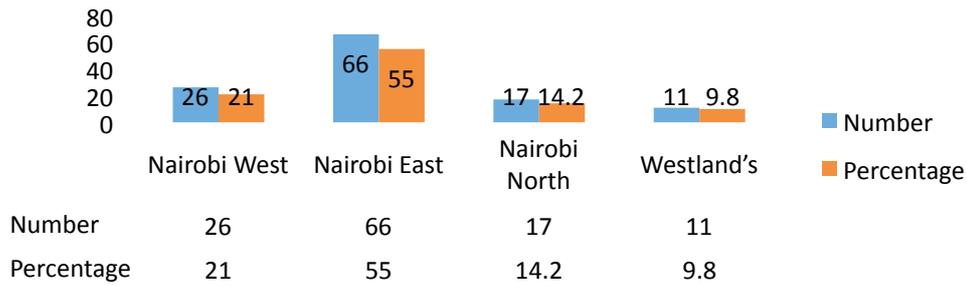


Figure 4.1: Distribution of the responses

ANALYSIS ACCORDING TO RESEARCH OBJECTIVES

4.4 Viewers' demographics influence on the viewership of local television content

The study sought to explore whether viewers' demographics influence the viewership of local television content. The findings are presented in the sections that follow.

4.4.1 Respondents' gender

Table 4.2 shows the gender distribution of the respondents across the four clusters in Nairobi. It was imperative for the study to understand who between men and women watch more TV programs and this helped to understand factors influencing the viewership of local television content in Kenya. This might also give an indication of which gender takes TV viewership seriously.

Table 4.3: Respondents' gender

		Frequency	Percent
Valid	Female	79	65.83
	Male	41	34.17
	Total	120	100.00

The study sought a relationship between gender of the respondents and its influence on local content TV viewership. The majority of those who watch TV are women at 65.83% of the responses although men at 34.17% also form a significant number.

Table 4.4: Inter- Correlation Matrix showing respondents' gender

Variable	Viewership of local TV content
Gender	.038

The above correlation results reveal that gender at $r=0.038$ is positively correlated with viewership of local TV content such that as they change positively in favor of local content. These findings support the findings by Esteves-Sorenson & Perretti (2012) that basic demographics like age and sex, because of life cycle implications, tell us a lot about TV viewing and that women watch more television than men do. In general on public TV, women tend to like drama, film and culture more than men.

4.4.2 Age of the respondents

The respondents were considered to be urban viewers who are well informed about TV viewership. Age is important as it denotes other factors such as experience in programmes, comprehension of risk-related issues, choice of programmes and good judgment.

Table 4.5: Age of respondents

	Frequency	Percent
Valid 18-24	14.0	11.7
25-29	19.0	15.8
30-34	12.0	10.0
35-39	11.0	9.0
40-44	12.0	10.0
45-49	15.0	12.5
>50	37.0	31.0
Total	120.0	100.0

The ages were classified into seven groups which were considered to belong to the class that were more likely to watch television. From the results of 120 respondents, there were 31% aged >50 years and this constituted most of the respondents then followed by 15.8% of 25-29 age bracket. This was then followed by 45-49 age class at 12.5%, then age of 18-24 at 11.7% while that of 35-39 years had the least percentage of 9%. This implies that majority of those who watch TV is young people and older people i.e. over 50 years and 18 to 29 years old.

This study believes that older people have more time to relax and watch TV and perhaps they have businesses run and managed by those in age bracket 30 to 44 years. This is the reason why the population in age bracket 30 to 44 years watches less TV. The young people watch more TV since some are un-employed and are in college. A study findings by Esteves-Sorenson & Perretti (2012) shows that basic demographics like age and sex, because of life cycle implications, tell us a lot about TV viewing and older people watch more TV.

4.4.3 Working status

Working status of the respondents was of paramount importance to the study since it largely relates to age and available time to watch TV. Table 4.4 shows the results;

Table 4.6: Respondents' working status

		Frequency	Percent
Valid	Full time	11.0	9.0
	Part time	12.0	10.0
	Unemployed	22.0	18.3
	Student	38.0	31.7
	Retired	37.0	31.0
	Total	120.0	100.00

Table 4.5 shows that most of the respondents were students at 31.7%, followed by the retired at 31% then the un-employed at 18.3%. The minority were full-time employees at 9% perhaps due to their busy schedules. These findings tie up with findings in table 4.3 above that old people and young people who are un-employed and in school watch more TV. Esteves-Sorenson & Perretti (2012) concurs with this that older people perhaps the retired watch more TV.

4.5 Content Quality and its influence on the viewership of local television content

The study sought to investigate if content quality influences the viewership of local television content. The findings are presented in the table 4.6. Quality of local content aired on TV is important for viewership. The respondents were asked to rate their level of satisfaction with the following aspects of the local content provided on a scale of 1-5 where 1= Extremely dissatisfied; 2= Dissatisfied; 3= Rather Dissatisfied; 4= Satisfied and 5= Extremely Satisfied

Table 4.7: Content quality and viewership of local content

Aspects of Content Quality	1	2	3	4	5
The stories carried by the content	14	47	10	33	16
The picture quality of the content	11	31	26	33	19
Audio (sound) quality of the content	5	47	16	34	18
General presentation of the content. How the content is packaged	13	47	10	43	7
Messages carried by the content	7	47	9	36	27
Others (Please Specify)	0	0	0	0	0

Table 4.6 shows the results obtained from the 120 respondents regarding whether or not they are satisfied or dissatisfied with quality of local content. Majority of the respondents (61 or 51%) are not satisfied with stories carried out in the local content while 49 or 40.8% are satisfied. 10 of them are not sure about stories in the local content. Surprisingly majority of them 52 are satisfied with picture quality in the local content compared to 42 not satisfied although the figure is close to each other. In addition, still a big number (26) are rather dissatisfied with the picture quality which means that on the overall, 68 of the respondents or 57% are not satisfied with picture quality. Only 43% are satisfied. This tells a lot about local content although it can be deduced that the close gap of 14% could mean that if a little adjustments are done, many people will watch local content.

Moreover, majority of the respondents 63 are satisfied with messages carried by local content compared to 54 who are not. Nine of them are rather dissatisfied. Messages are very important to viewers besides the entertainment part of it. Lastly, audio (sound) quality of the content matters a lot to the viewers. It appears that the respondents were had mixed reactions with audio quality with the responses tying at 52 of those dissatisfied and 52 not satisfied. Overall, those who are dissatisfied with audio quality in the local content are slightly more than those satisfied if the rather dissatisfied (16) are taken into account.

The majority of those who watch TV are affected by how they perceive the quality of the local content compared to foreign materials such that such that if viewers perceive local

content to be of poor quality, the likelihood of watching foreign materials increases. Thus, content quality is a key determining factor of local TV content viewership. Moreover, the correlation matrix reveals that on the overall, this also means that as Content Quality (CQ) change positively in favor of local content, the local content viewership across the country increases relative to foreign materials. This is shown by $r=0.047$ that there is a positive correlation between content quality and local content viewership.

Table 4.8: Inter-Correlation Matrix between Content quality and viewership of local content

Variable	Viewership of local content
CQ (content quality)	.047

The older people are more interested in topical issues and educative messages compared to the young who like entertainment (comedy etc.) (Esteves-Sorenson & Perretti, 2012). In addition, quality of content relates to sound, theme and picture quality and the study wanted to confirm is indeed access to premium content is a serious bottleneck and a source of market power as observed by Ashuri, 2007; Mast, 2009 Alhassan, 2013.

In addition, the above study findings are in line with findings by Alhassan (2013) who showed that people watch television for the purpose of education, relaxation, entertainment and as aid study/work. In addition, he revealed that the credibility of television station, clear reception of programs, station heritage, news coverage, etc. play an important role in winning viewer's hearts. This means that without quality, local content is deemed useless.

Most respondents are not satisfied with general presentation of the content and how the content is packaged and more importantly the entertainment part of it. It appears that although local content has come a long way in presentation and quality, a lot needs to be done.

In addition, the responses points to a problem in the general presentation of the content and how the content is packaged especially local news and reality shows. Some of the respondents said the following about local news, *"It's too dumbed down, they say; it's no longer news but entertainment, celebrity-obsessed and vapid"*. Quality has been eroded by celebrity status with news and other programmes replace with celebrity faces for entertainment rather than message or content.

4.6 Content distribution platforms and influence on the viewership of local TV content

The study sought to determine whether content distribution platforms influence the viewership of local television content. The findings are presented in the sections that follow. This section looks at variety of distribution platforms that affect local content viewership. Kenya stepped up digital switchover in urban centers and this with the plan to expand this to the rural areas. This means increased competition for quality local content but more importantly, local content faces stiff competition from foreign materials. Distribution platform relates to free to air and pay TV. The results are shown in the sections that follow;

4.6.1 Set top boxes

The researcher wanted to understand the extent to which content distribution platforms affects local content viewership. The respondents were asked if they owned a set top box or not.

Table 4.9: If they owned a set top box or not

Response	Frequency	Percentage
Yes	113	94.17
No	7	5.83
TOTAL	120	100

Table 4.8 shows that majority of the viewer's (113 or 94.17%) own a set top box perhaps due to the mandatory switch over by Communication Authority of Kenya. Indeed, most TV viewers in Nairobi were forced to purchase set top boxes against their will which saw an increased number in purchase of set top boxes. Very few people as per the responses received did not own the set top boxes. If the 3,138,295 total inhabitants in Nairobi County as per Census, (2009) is to be considered, the 5.83% of this i.e. (182,380) people have no set top boxes although this could be validated by future studies.

4.6.2 Pay a monthly fee to watch TV

Furthermore, the study sought to establish if the viewers or respondents pay a monthly fee to watch TV or not. Table 4.9 shows the results

Table 4.10: Pay a monthly fee to watch TV

Response	Frequency	Percentage
Yes	113	94.17
No	7	5.83
TOTAL	120	100

Table 4.9 reveals that all the respondents that own set top boxes pay a monthly fee as high as Kshs. 7,000/- to watch TV. 94.17% of the respondents pay a monthly fee to watch TV against 5.83% who do not pay anything.

4.6.3 Set top distribution companies and channels watched

Viewership of local content depends entirely on the distribution companies. When the respondents were asked to list all the set top distribution companies they are aware of, many of them seemed to be confused by the different companies. In addition when asked which channels they watch more, foreign channels and materials were on top of the list. Women watch soap operas and drama films while men watch documentaries, topical issues like politics and local news. These findings concur with findings by Esteves-Sorenson & Perretti, (2012). Moreover, the findings confirm the observations in 4.3 that quality of content has pushed most Kenyan viewers to watch foreign materials.

Although the Kenyan pay-TV market is still in its infancy with low penetration levels especially for the satellite sector like Multichoice, this is set to increase in the future. The projected figure is 531 000 subscriptions by the end of 2017 as stated by Githaiga (2011) although this has been surpassed already if the numbers in this study is anything to go by. Perhaps the author did not anticipate the mandatory switchover to digital platforms. In addition as Githaiga (2011) observed that the media in Kenya has grown tremendously in the last two decades, it could mean that the increase in purchase of set top boxes is to allow viewers access to many TV stations. But local content viewers would like free set top boxes as opposed to paid set top boxes.

If more viewers purchase set top boxes, the likelihood of watching foreign materials increases relative to local content. Thus, content distribution platforms are a key-determining factor of local TV content viewership although it has a negative correlation. In addition, the correlation matrix was done on all the variables. On the overall, the results show an average negative relationship between Content distribution platforms (CDP) and viewership of local content at -.080. This means that as more TV viewers buy the pay to view set top boxes and when there

are a variety of content distribution platforms, the viewership of local content across the country decreases relative to foreign materials. More foreign materials are watched when content distribution platforms are many.

Table 4.11: Correlation between Set top distribution companies and channels watched

Variable	Viewership of local content
Content distribution platforms (CDP)	-.080

4.7 Consumers' perception of local content and its influence on the viewership of local television content

The study sought to investigate if consumers' perception of local content influences the viewership of local television content. The findings are presented in the sections that follow. A scale of 1-5 is used where 1=strongly disagree; 2=disagree; 3=neutral; 4=agree and 5=strongly agree.

Table 4.12: Perception of consumer's about local content

Statement	5	4	3	2	1
Local content in Kenya is generally boring	2	23	12	77	6
Local content in Kenya is generally low quality	9	77	23	11	0
Local content in Kenya is inferior	19	69	18	10	4
Local content in Kenya is for free to air channels	19	77	13	9	2
Local content in Kenya is not for the young and modern audience	17	79	13	8	3

Table 4.12 show the results for perception of consumer's about local content. Majority of the respondents 77 or 64% disagreed with the statement that local content in Kenya is generally boring while 6 strongly disagreed. Compared with 25 who agreed with this statement and the 12 who remained neutral, it appears after all that Kenyan content is not boring. On the benefit to quality of content, majority of the younger generation or audience 96 out of 120 responses (80%) believe that local content in Kenya is not for the young and modern audience. This then implies that the remaining 20% which include those who remained neutral are the older audience who like local content. The majority of those who watch TV are affected by how they perceive the local content compared to foreign materials. Thus, consumers' perception is a key determining factor of local TV content viewership.

In addition, the correlation matrix was done on all the variables. On the overall, the results show an average positive relationship between Consumer Perceptions (CP) and viewership of

local content at 0.026. This means that as consumer perceptions change positively in favor of local content, its viewership across the country increases relative to foreign materials.

Table 4.13: Correlation between Consumers’ perception of local content and influence on the viewership of local television content

Variable	Viewership of local television content
Consumers’ perception (CP)	.026

Majority of the respondents 86/120 hold the perception that local content in Kenya is generally low quality which means low audio quality, poor picture quality, stories are not relevant and the messages are not educative. This could be true or not depending on which station one watches. Furthermore, majority of the respondents 88 out of 120 believe that local content in Kenya is inferior to foreign content. Only 14 of the respondents disagreed with the statement that local content in Kenya is inferior. In relation to this, most respondents 96 or 80% believe that local content in Kenya is for free to air channels.

Furthermore when the respondents were asked if in their opinion local content could be better, all of them said Yes. When probed further on what could be made better, the following came out: picture quality, message in the local contents and be original. For example some respondents lamented that most local content is not original and is often copied from materials.



Table 4.14: Characteristics of Nairobi TV Audience

Desire	Characteristic
Social Contact	<ul style="list-style-type: none">• Watch programme as a topic of discussion and interaction (learning)• Wants fun and entertainment.• Get involved with the characters in the programme.• Identify with characters which are non-fictional.• Get in touch with people of same age
Curiosity	<ul style="list-style-type: none">• Enjoy programmes aired locally.• Learn how to overcome fears, strategize, acquire something they need and get co-operation through the contestants in reality TV shows.• Seeks novel stimulations.• Try to understand what the faces behind TV dramas go through
Social Status	<ul style="list-style-type: none">• Feels superior when comparing self with participant.• Fantasize about gaining the same celebrity status as the ordinary people in the show.• Self-importance
Tranquility	<ul style="list-style-type: none">• Inner peace through Safety and relaxation.• Recognition of the characters brings feelings of security.• Distraction from tragic world and local events.

From table 4.14, it can be said that perception is a mental process and it relates to behaviour which is often affected by personal and environmental factors (Munyoki & Odudoh, 2012). This study sought to validate this claim in order to check whether indeed perceptions affects viewership of local content. The results show that indeed perception is behavioural in nature and relates to an individual's attitudes towards an object. The audience in Nairobi are largely driven by various desires namely social contact, curiosity, social status and tranquility and these in turn influence viewership of local TV content.

CHAPTER FIVE: DISCUSSIONS, CONCLUSIONS AND RECOMMENDATIONS

5.1 Introduction

Based on its objectives, this study provided answers to research questions in chapter one. The answers to the research questions are based on regression results and these are discussed in this chapter. The discussions on the findings of this study are organized on the basis of research questions. The study was guided by supply and demand and marketing theories (Day, 1983; Munyoki & Odudoh, 2012). These theories in relation to viewership of local TV content in Kenya and the factors affecting local content viewership discussed in this study.

5.2 Discussions

The discussion revolves around the research questions as follows;

5.2.1 Consumer demographics and the viewership of local television content

Consumer demographics play an important role in influencing viewership of local television content. This study did an analysis on age and gender. Study findings by Esteves-Sorenson & Perretti (2012) shows that basic demographics like age and sex, because of life cycle implications, tell us a lot about TV viewing. The findings in this study concur such that age and gender do indeed influence the viewership of local television content. For example according to this study, older people or those retired watch more TV than young people and women watch more TV than men. Gender should be a key focus for TV stations to carry out proper segmentation

One important observation from this study is that viewers mostly prefer entertainment programs and the most watched program is local TV news. This may be due to the fact that recently a lot has been happening in Kenya, which could mean that viewers always want to catch up with the latest bulletins. This finding supports the findings by Centre for Media Studies (CMS, 2011) and Hagen (1994) that the social and environment impact of TV or radio programs and people watch news as a civic duty.

5.2.2 Does the quality of local content affect the viewership of local television content?

Content quality in this study was linked to sound quality, theme of the programmes, picture quality and the messages. This study came up with statements as follows: The stories carried by the content; the picture quality of the content; audio (sound) quality of the content; general presentation of the content. How the content is packaged and messages carried by the content. The findings reveal that most respondents or viewers do not find local TV content boring

although most of them have challenges with audio quality, picture quality and the messages. When probed further, most of the respondents prefer original content.

The biggest problem as observed by Polan (2010) in their study in Egypt is piracy which has decreased the value of the premium content. This is the major problem in Kenya where piracy and corruption have affected local content like local movies which have affected quality. Thus, the preference of foreign materials is real especially with reality TV shows. Critics decry the current state of our public local content with local television news as a target which is no longer news but entertainment, celebrity-obsessed and uninspiring. Ideally, people should watch television for the purpose of education, relaxation and as aid study/work besides entertainment (Alhassan, 2013). This will not be possible if quality of the content is extremely low or compromised.

5.2.3 The effects of distribution platforms on viewership of local television content?

Distribution platforms form the basis for intense competition in the local arena. This study found out that most viewers in Nairobi County would prefer local TV content to be aired free and pay for foreign materials. But as things stand, the viewers of local TV have had to part with some monthly fee in order to watch their favourite local and international programs. This came as a result of the Communication Authority of Kenya's directive on mandatory switch to digital platforms. In addition, most of the respondents are on pay TV platforms at least in the short-term as they wait for free to air platforms by the media houses. The reason why most of the respondents are on pay TV platforms is that local TV content although not boring is of low quality hence watching foreign materials is the order of the day. One interesting finding is that the increase in distribution platforms reduces the rate at which local TV content is watched i.e. an inverse relationship exists between distribution platforms and viewership of local TV content. When Kenyan viewers are asked to buy the set top boxes whether paid or not, it increases the opportunity to watch more foreign content.

As opined by Wilbur (2008), although digitalization has significantly reduced barriers in access to transmission facilities, competition concerns have not ceased to exist. This supports the above findings that digitalization and increased distribution platforms have increased competition both for local and foreign content. As a matter of fact most respondents 88 out of 120 responses received believe that local TV content is inferior to foreign content. Hence, the independent variable distribution platforms are inversely related to viewership of local TV content as per this study.

5.2.4 Consumer perceptions of local content and viewership of local television content?

Consumer perceptions can be summed up as having either a positive or negative attitude towards something and in this case towards local TV content. The study shows that a positive relationship exists between consumer perceptions and viewership of local TV content. This implies that as consumer perceptions become more positive towards local content, so does viewership increase and vice versa. Currently as things stand, the perception towards local TV content is negative except for a few TV stations like Citizen which has tried to air some quality local programs. In addition, this study can confirm that indeed perception is a mental process as stated by Anderson (2002) such that people make a decision after several considerations. For example, before a viewer purchases a set top box they go through a process of information search, testing the market, looking for options, purchase, use and sometimes disposal if the set top boxes do not serve the intended purpose. Virtually all the respondents have a set top box except four of them.

Moreover, price is the important factor that affects perception and it is taken as a leading factoring guiding choice when it comes to making a buy decision. Price in this case is the initial purchase price for the set top box and cost of maintenance. Price normally has constantly been a determinant factor on consumers' brand choice when choosing a product or service. It is understood that when a consumer is facing a buying decision for product purchase then he/she is so much concern about the prices of the product and observe prices keenly. The study found out that it better to purchase an expensive set top box and get value for money in terms of quality reception, programs, sound and minimal interruptions than look for cheap and poor quality.

On the overall, consumer perceptions that came out of this study are: Although the viewer's said that local content is not boring, they believe that it is inferior, generally of low quality and it is not meant for young or modern audience.

5.3 Conclusions

The study findings revealed that the most important influencers of viewership of local TV content are CQ (Content Quality), CP, Consumers' Perception and Demographics. Thus, it can be concluded that these factors influence viewership of local TV content in Nairobi County at the time of the study. These are in turn affected by personal and environmental factors (Munyoki, 2012). Figure 5.1 below shows the interaction of the factors where the Marketing theory is modified.

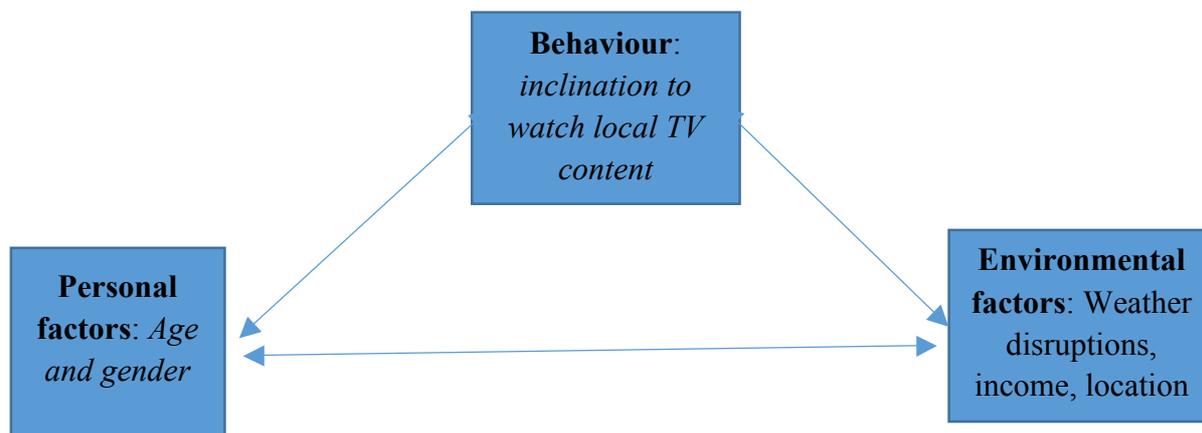


Figure 5.1: Summary of factors influencing viewership (Adapted from Munyoki & Odudoh, 2012)

5.3.1 Viewers' demographics influence the viewership of local television content

The study sought to explore whether viewers' demographics influence the viewership of local television content and this was in relation to gender, age and working status of the respondents. Studies based on the "uses and gratifications" paradigm have shown that people have different motivations and needs that lead them to expose themselves to different media content. These factors according to this study are age and gender and environmental factors like location, weather changes etc.

For example, the study revealed that older people watch more TV than the young because they have some free time. In addition, personal factors like gender affect viewership with many women watching more TV than men. This concurs with findings by (Esteves-Sorenson & Perretti, 2012). Thus, it was found that age and gender plays a big role in determining whether people watch local content or not. However, religion did not seem to influence the viewership of local Television content.

5.3.2 To investigate if content quality influences the viewership of local television content.

The study sought to investigate if content quality influences the viewership of local television content. The findings of the study revealed that content Quality seems to be an important factor influencing viewership of local TV content and this relates to things like audio or sound quality, picture quality and messages. As Alhassan (2013) pointed out his study about the preference for Television Stations among inhabitants in Ghana, people watch television for the purpose of education, relaxation, entertainment and as aid study/work. In addition, he

has revealed in his study that the credibility of television station, clear reception of programs, station heritage and news coverage play an important role in winning viewer's hearts. This is not different from Kenya though since factors like credibility of television station, clear reception of programs, station heritage, news coverage and others play a key role in determining viewership of local content. It is imperative to note that most respondents in Nairobi County were keen on quality of local content including variety.

5.3.3 Content distribution platforms influence the viewership of local television content

The study sought to determine whether or not content distribution platforms influence the viewership of local television content. The study concludes that viewers in Nairobi are exposed to different stations ranging from free-to-air stations such as state owned Kenya Broadcasting Corporation (KBC) to Pay TV stations (e.g. DSTV). The existence of alternatives demands preference and choice of television stations based on the viewer's unique and diverse needs. The findings revealed that inclination to watch local TV content is affected by income and location such that the poor in Nairobi would prefer free to air channels to pay TV. The rich have no issue with paying for TV as long as quality is assured. If the local content is of low quality, inclination to watch local TV content will be reduced and the viewers interviewed will turn to other available content on other channels. This has been evidenced by the strong negative correlation between content distribution platforms and viewership of local TV content.

5.3.4 Consumers' perception of local content and influence on the viewership of local television content

The study sought to investigate if consumers' perception of local content influences the viewership of local television content. From those interviewed, it was clear that local content is not. Majority of the respondents (86/120) hold the perception that local content in Kenya is of low quality which means low audio quality, poor picture quality, stories are not relevant and the messages are not educative. Furthermore, majority of the respondents 88 out of 120 believe that local content in Kenya is inferior to foreign content. Only 14 of the respondents disagreed with the statement that local content in Kenya is inferior. In relation to this, most respondents 96 or 80% believe that local content in Kenya is for free to air channels.

From the findings, it is therefore clear that the majority of those who watch TV are affected by how they perceive the local content compared to foreign materials. Thus, consumers' perception is a key determining factor of local TV content viewership.

5.4 Recommendations, Limitations and areas of further studies

5.4.1 Recommendations

Institutions or media houses should realize that personal and environmental factors affect viewership of local TV content. Thus, continuous market research is required in order to understand customer needs. This in turn will help to develop content that suits a particular market segment or address a certain need in the market.

On the same note, (STP) Segmentation, Targeting and Positioning strategy as suggested by Kotler and Keller (2012), allows for market segmentation according to income; gender and other factors in order to carry out target marketing as opposed to mass marketing. The idea behind this concept is to develop content that suits a particular segment in order to increase revenue. Perhaps local Television content should be open for a particular customer segment like for women, for men, for the old and other segments.

Lastly, institutions or media houses should push for free Content distribution Platforms in order to increase viewership. The policy makers should create and push policies that not only support the creation of local content but also give the viewers platforms to enjoy this content.

5.4.2 Limitations

Although this research has reached its aims, there were some unavoidable limitations. First because of time limit, this research was conducted on the small number of respondents who gave back their feedback. To generalize the results on the large population size, more respondents should have been involved.

Second, with the many cultural orientations in play among the sample involved, it is unavoidable that in this study, certain level of subjectivity in the responses can be found.

Lastly the questionnaire prepared to give the viewers' perception of local content might give useful information about the perception of local content, it seems not to provide enough evidence of the viewers' actual behavior towards the viewing of the content in relation to their perception of it.

5.4.3 Areas of Further Studies

Further studies could be conducted on this topic focusing on a particular case or TV station but perhaps using a different methodology like observations and ethnography. Mixed methodologies could be applied to this topic to establish how the lagged variables influence

viewership of local TV content. Moreover, data could be collected over a long period of time as opposed to a particular point in time perhaps 5-year period.

In addition, further studies in this area could be done to investigate other factors that influence viewership of local TV content other than CDP (Content distribution Platforms), CQ (Content Quality), and CP (Consumers' Perception and Demographics). The model explains 80.5% of variations in Viewership of local television content, which suggests that 19.5% of the variations in viewership of local TV content are possibly explained by other factors not considered in this study. Duplication of this study in other areas in Kenya particularly rural areas will provide empirical evidence on other moderating effects on viewership of local Television content. Such research efforts are desirable in the light of the differences in viewership practices across the country as well as differences in culture, social and economic development.



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APPENDIX I: INTRODUCTION LETTER

Dear Respondent,

COLLECTION OF SURVEY DATA

I am a postgraduate student at the Strathmore Business School. In partial fulfillment of the requirements for the degree of Masters in Business Administration (MBA), I am undertaking a management research project entitled; **“Factors influencing the viewership of local television content in Kenya: a case of Nairobi county.”**

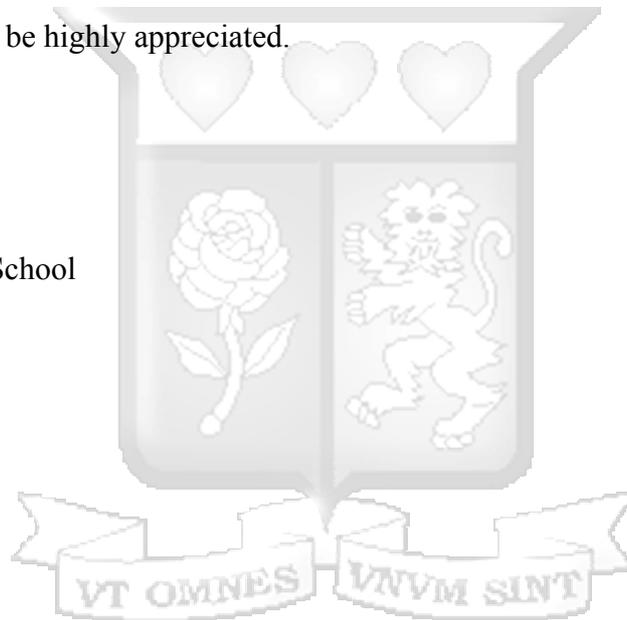
I therefore kindly request you to assist me in filling out the attached questionnaire.

The Information provided will be used exclusively for the purpose of this research and will be treated in strict confidence. A copy of the final report will be availed to you on request.

Your cooperation will be highly appreciated.

MBA Student

Strathmore Business School



APPENDIX II: QUESTIONNAIRE

Part 1: Demographics

1. Where do you reside?

Nairobi West ()

Nairobi East..... ()

Nairobi North..... ()

Westland's..... ()

2. What is your age in years?

18 – 24 years ()

25 – 29 years ()

30 – 34 years ()

35 – 39 years ()

40 – 44 years ()

45 – 49 years ()

50+ years ()

3. Gender

Male ()

Female ()

4. Marital status

Married / cohabiting ()

Single ()

Separated / divorced ()

Widow/ Widower ()

5. Working status

Full time ()

Part time ()

Unemployed ()

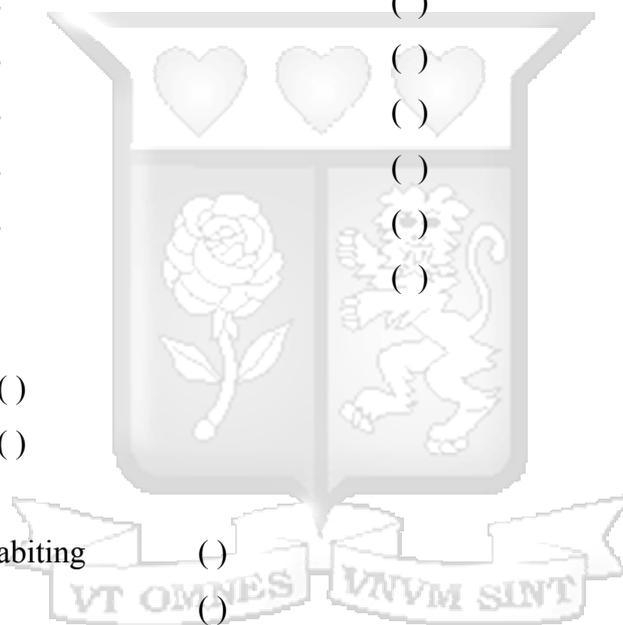
Student ()

Retired ()

6. Religion

Muslim ()

Christian -Catholic ()



- Christian – Protestant ()
- Indigenous ()
- Hindu ()
- Other - specify ()

7. What is your level of education?

- Never went to school ()
- Some Primary school ()
- Secondary school ()
- College education ()
- University ()
- Post graduate ()
- Other (specify) ()

Part 2: Content Quality

8. Please tick to rate your level of satisfaction with the following aspects of the local content provided on a scale of 1 to 5 where on a scale of 1-5 where 1= Extremely dissatisfied; 2= Dissatisfied; 3= Rather Dissatisfied; 4= Satisfied and 5= Extremely Satisfied

		1	2	3	4	5
	Aspects of Content Quality					
	The stories carried by the content					
	The picture quality of the content					
	Audio (sound) quality of the content					
	General presentation of the content. How the content is packaged					
	Messages carried by the content					
	Others (Please Specify)					

Part 3: Distribution Channels

9. Do you own a set top box?

Yes.....1

No.....2

10. Do you pay a monthly fee to watch TV?

Yes.....1

No.....2

11. Could you list all the set top distribution companies you are aware of?..... (List extensively)

12. Which channels on the set top box do you watch?..... (List extensively)

Part 4: Viewer Perception

13. Please tick if you agree or disagree with following statements. 1=strongly disagree; 2=disagree; 3=neutral; 4=agree and 5=strongly agree

Statement	5	4	3	2	1
Local content In Kenya is generally boring					
Local content in Kenya is generally low quality					
Local content in Kenya is inferior					
Local content in Kenya is for free to air channels					
Local content in Kenya is not for the young and modern audience					

14. In your opinion could local content be better? Yes () No ()

