UNIVERSITY OF NAIROBI

**AUDIENCE CONSUMPTION PATTERNS OF PAY-TELEVISION: THE CASE OF LIVE FOOTBALL BROADCASTS IN KENYA**

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**UNIVERSITY OF NAIROBI.**

## DECLARATION

I hereby affirm that this project is my original work and has not been previously presented, in part or in totality, to any other institution of learning for the award of any degree or examination.

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Signed: Date: 8th November 2023

This project has been submitted with my approval as the University supervisor.

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Signed Date 16th November 2023

**DEDICATION**

To my wife - whose advice, patience and unwavering faith in me have consistently inspired me through the peaks and troughs of this study.

To my parents - whose unbridled joy and pride after completion of this study will be a sight to behold.

And finally, to me – for not giving up.

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## ABSTRACT

This study examines the complex terrain of pay-TV preferences, consumer behaviours, and the variables affecting these choices in the context of Kenya's shifting media consumption habits and rising interest in football. The study employs a mixed-methods approach that includes surveys and key informant interviews to gain thorough insights into the study. According to the research, Supersport on DSTv is Kenya's most popular live sports broadcaster because of its comprehensive coverage of sport, excellent broadcasts, accessibility, and emotional impact. Various factors, such as the quality of the viewing experience, cost, and personal preferences can influence pay-TV choices. The data also reveals dynamic changes in subscription behaviour, whether respondents stop, cut back on, or add internet streaming to their pay-TV subscriptions. The study's main concern is why there is a contradiction where pay-TV subscriptions are stagnating in the period studied, yet interest in football is rising. The study's goals include understanding preferred sports broadcasters, audience preferences while consuming sports broadcasts, and the causes of declining pay-TV subscriptions. The study approach includes methods for sampling, instruments for gathering data, and ethical issues. The gender distribution, age, education, income and employment status of respondents are highlighted through careful data analysis and presenting techniques. Sports viewing habits, particular sports broadcast preferences, and consumption behaviour are all explored. According to key informants, pay-TV companies need a variety of programming, high-quality viewing experiences, competitive prices, and flexibility to draw in and keep users. The study's conclusion emphasizes the significance of adjusting to shifting customer tastes and behaviours in the dynamic media environment.

## ABBREVIATIONS AND ACRONYMS

| | | |
|---|---|---|
| **BARB** | : | The Broadcasters Audience Research Board |
| **CA** | : | Communications Authority of Kenya |
| **DTH** | : | Direct-to-Home Transmission |
| **DTV** | : | Digital Television |
| **F1TV** | : | Formula 1 Television |
| **FIFA** | : | Federation of International Football Association |
| **FTA** | : | Free to air |
| **NBA** | : | National Basketball Association |
| **NFL** | : | National Football League |
| **OTT** | : | Over-the-top |
| **PAY-TV** | : | Pay-television |
| **STV** | : | Stellavision Television |
| **TV** | : | Television |
| **UEFA** | : | Union of European Football Association |

# CHAPTER 1: INTRODUCTION

## 1.1 Background of the Study

Sports and television have become intrinsically linked in their quest to entertain audiences. Since the first televised broadcast of a live sporting event featuring a Major League Baseball game between Reds and Dodgers from Brooklyn, USA, occurred on August 26$^{th,}$ 1939 (Schultz, 2002), the industry has exponentially grown to become a global behemoth of substantial public interest and economic potential. In the last couple of decades, the sale and purchase of broadcast rights, especially television broadcast rights for sports, has become an extremely profitable business that has led to the rise of a worldwide industry worth an estimated $30 billion (PricewaterhouseCoopers, 2011 in Evens et al., 2013). Sports broadcasts account for a large proportion of the revenue source for television stations and professional sports leagues and teams across the globe (Fort, 2006).

In major global broadcast markets, audiences are consistently drawn to weekly sports programming on television, with millions tuning in to watch their favourite teams. According to Nielsen ratings, the Super Bowl, NBA Finals, and MLB games dominate the sports broadcast market in the United States every year (Nielsen, 2022). A dominance so entrenched that in 2022, the American National Football League held 22 of the top 25 primetime telecasts of the year in America (Schneider, 2022). In the United Kingdom, the Broadcasters Audience Research Board ratings show live football matches are the most popular sports broadcasts (BARB, 2022).

Globally, sports broadcasting - primarily football broadcasting - has become a private good produced and consumed in plenty that it’s consistently and by far become the most popular sport globally. Its governing body, the Federation Internationale de Football Association - FIFA, has more member states than the United Nations (Jennings, 2016). Its premier competition, held every four years, the FIFA World Cup, is the world's most watched sporting event (Siegelman, 2018). Every year, two of the three most popular sports broadcasts that generate the most interest among global audiences are football competitions. The English Premier League and the UEFA Champions League account for an estimated 709 million and 610 million unique viewers respectively (PricewaterhouseCoopers, 2021).

In Africa, football has become key to the fabric of life. Scholars have keenly studied it for its visible impact on history, society, and business. Football's history in Kenya is long. Its beginning can be traced to its introduction in the colonial period when British colonists used it to enlighten Kenyans about perceived European morals and values. Given the existing colonial relationship between the two nations, it is no surprise that almost 60 years after independence, the English Premier League captivates Kenyan audiences, young and old, like no other sporting competition. Perhaps only Athletics, considered by many as Kenya's specialist sport, can challenge the dominance of football among Kenyan audiences (Gichangi, 2004).

Given its popularity, Kenyans routinely seek ways to consume the English Premier League and other competitions in which players from the league participate, such as the UEFA Champions League, Europa League, European Championships, the World Cup, and the African Cup of Nations. On average, Kenya records a higher frequency of radio listenership and tv viewership in the months during which major sporting events like the FIFA World Cup, the African Cup of Nations, and the Olympics occur compared to the other months of the year (Communications Authority, 2020).

The Media Council of Kenya estimates that about 80% of the 16 million Kenyans who consume tv daily watch sports content (Media Council of Kenya, 2020), mostly packaged as news reports. Indeed, sports bulletins across local television networks often contain segments dedicated to highlights from leading European football leagues. However, as mentioned above, live broadcasts of the football competitions have been limited to pay-TV providers like DSTv (Deloitte, 2012), Zuku, and StarTimes. For decades, audiences have been limited to pay-TV providers only to access live football broadcasts in the comfort of their homes, in bars and restaurants, or in video showrooms (colloquially referred to as *vibanda*).

Yet alternatives brought about by mobile phones, video-on-demand, and digital technologies are now part and parcel of traditional audiences fraying. New entrants to the Kenyan market, like GOtv and Showmax (both owned by Multichoice), and streaming websites like Netflix, Amazon Prime, F1TV, and NBA TV have sparked an intense battle for eyeballs as they broadcast content through online streams (Sunday, 2020). Audiences also subscribe to multiple broadcast channels to access different types of content (Business Daily, 2020), upending how audiences consume live broadcasts. Pay-TV, local broadcasters, and even betting/gaming companies are feeling the impact of these new market entrants changing audiences' consumption habits. Against this backdrop, and through Uses and Gratifications Theory and Technological Determinism Theory, this study will focus on Kenyan audiences' consumption habits of the English Premier League and the UEFA Champions League broadcasts on pay-TV channels.

**1.2 Pay-TV Broadcasting Model**

Pay-TV is defined as paid television services provided to consumers through a decoder for a fee (Merriam-Webster, 2022). The existing model of live football broadcasts on pay-TV can be traced back to the mid-1980s, when commercial television broadcasters saw revenue opportunities for selling advertisements around sports programming and invested large sums of money in sports broadcasting rights (Evens et al., 2013).

The model requires television companies to present broadcasting bids to sports leagues for the rights to broadcast their sport to the public on a regional or global scale for a certain period. Competition during bidding for the broadcasting rights can be fierce, and significant fee increases by the rights sellers, such as the sports leagues, require broadcasters to bid substantial amounts of money to acquire the rights, which, in turn, they would use to attract audiences to their tv channels (Geey, 2019).

Football is a must-have product for television broadcasters that allows them to sell wider subscription services and lucrative premium programming packages to audiences. Competitions like the Premier League and the UEFA Champions League provide exclusive, must-have, premium football content for broadcasters to convert millions of fans worldwide into long-term pay-TV subscribers. Pay-TV broadcasters routinely outbid free-to-air broadcasters for the rights to broadcast live football because of the large sums of investments needed in purchasing these rights.

### 1.3 Overview of Premier League and UEFA Champions League Broadcasts in Kenya

Kenyan audiences can access live football broadcasts in three main ways:

(i) Local free-to-air (FTA) broadcaster K24 broadcasts one English Premier League game every matchday (usually every Saturday at 5.00p.m / 6.00p.m.) as well as weekly highlights from the league (Okoth, 2020). K24 also streams the matches on YouTube. K24 also broadcasts other sports like rugby.

(ii) The national broadcaster Kenya Broadcasting Corporation, broadcasts major football tournaments like the World Cup, AFCON tournaments, and the Olympics.

(iii) Pay-TV broadcasts provided by DSTv, GOtv, Zuku, and StarTimes, who often own exclusive rights to live football broadcasts in Kenya and;

(iv) Online streaming video on demand (SVOD) provided by Showmax and illegal streaming websites that offer peer-to-peer streaming services at little or no cost.

At the end of 2021, Kenya had four pay-TV service providers (Communications Authority, 2022). These are DSTv and GOtv (both owned by Multichoice Kenya), StarTimes, owned by StarTimes Group, and Zuku, owned by Wananchi Group. Kenya National Bureau of Statistics estimates that 1.7 million pay-TV households are subscribed to pay-TV in Kenya (Kenya National Bureau of Statistics, 2020). DSTv has been available in Kenya since 1995. Kenya Broadcasting Corporation (KBC) pioneered it as a joint venture with M-Net South Africa (Moggi & Tessier 2001). Since the liberalization of broadcasting in Kenya in the 1990s, the English Premier League and the UEFA Champions League have been primarily broadcast through DSTv except from mid-2007 to early 2008 when a British-based company, Gateway Television's (GTV) aggressive expansion into Africa wrestled the African broadcasting rights for 80% of Premier League matches away from DSTv (Vokes, 2010). Since then, more providers have entered the broadcast market, as shown in *Table 1.1*.

| **Sports Broadcaster** | **About** |
|---|---|
| DSTv | Main broadcasters of live sports in Sub-Saharan Africa. Owned by Multichoice and has been operational in Kenya since 1995. Broadcasts include the English Premier League, the UEFA Champions League, FIFA tournaments, rugby, cricket, golf, motorsport, cycling, boxing, and athletics. (Multichoice, 2022). DSTv has held the rights to broadcast the English Premier League since 1992 (Premier League, 2017). |
| GOtv | A digital terrestrial television platform owned by Multichoice and launched in 2011. Broadcasts a selection of live football, athletics, and rugby (Multichoice, 2022). |
| Showmax | Owned by Multichoice. It is an internet-based subscription video-on-demand accessible through smart TVs, computers, smartphones, and tablets. It broadcasts select live sports through streaming. Launched in 2016 (Showmax, 2022). |

| | |
|---|---|
| StarTimes | Owned by StarTimes Group and launched in 2008. It broadcasts on a Direct-to-Home satellite TV platform (DTH), a digital terrestrial TV platform (DTT), and an Over-the-Top platform (OTT). The main attractions include football and Motorsport (StarTimes 2022). |
| Zuku | Pay-TV broadcaster owned by Wananchi Group. |
| K24 | Free-to-air broadcaster owned by Mediamax. It broadcasts live football matches from the Premier League, Serie A and Bundesliga, and local rugby. (Mediamax, 2022). |
| KBC | Public service broadcaster owned by the Kenya Government. Broadcasts international tournaments like the Olympics and World Cup (KBC, 2022). |

*Table 1.1: Major sports broadcasters in Kenya source (Media Council of Kenya, 2022)*

### 1.4 An Overview of the Current State of Audience Consumption of Live Football in Kenya

Continued renewal of broadcasting rights to the English Premier League (EPL), the UEFA Champions League as well as the periodical FIFA World Cups, European Championships and African Cup of Nations by DSTv has all but conditioned Kenyan audiences on where to find their preferred football broadcast. However, social, cultural, and technological changes are profoundly impacting the habits of consuming football broadcasts among Kenyan audiences. Severin & Tankard (2001) attribute this drastic shift to the advent and spread of the internet. They suggest that the internet has become the biggest game-changer in communication since the invention of broadcasting.

Football content that audiences could only access through pay-TV channels like DSTv and StarTimes can now be consumed through streaming, video-on-demand, and in some cases, free-to-air broadcasters. The change in the manner in which Kenyan audiences watch football could be attributed to improved access to broadband services which stood at 21 million in 2018 but has now increased to 32 million in 2022 (KNBS Economic Survey 2023). Conversely and despite Kenya's migration to digital broadcasts, purchase of digital set top boxes fell from 4.5 million in 2018 to 4.3 million in 2022. Set-top boxes are the primary means of accessing free to air broadcasts and pay-TV subscriptions in Kenya. Further, between 2018 and 2020, pay-TV subscriptions dropped by 53,000 from 1,573,247 to 1,520,083 (KNBS Economic Survey 2023).

The pay-TV downward trend in Kenya starkly contrasts the African market in general. For comparison, in South Africa, where DSTv broadcasts similar sports content using similar products as they do in Kenya (Supersport, GOTv, and Showmax), subscription numbers to pay-TV services grew. In 2018, DSTv had 6.9 million subscribers in South Africa (MultiChoice, 2018), and by the end of 2021, this figure had grown to 9 million subscribers (MultiChoice, 2021).

### 1.5 Research Problem

Nearly half of the world population are interested in football, and one-fifth participate in football matches (Nielsen, 2014). Further, the countries with the highest interest and participation in football are in Africa, Asia, and the Middle East (Nielsen 2018). In 2018, more than 40% of respondents aged 16 years or older in major population centres around the world considered themselves "interested" or "very interested" in following football (Nielsen 2018). The growing interest in the sport also transcends gender, as 70% of women find competitions like the men's FIFA World Cup "very appealing," and 58% of women find the Women's FIFA World Cup "very appealing." (Nielsen, 2018).

Football's appealing nature to the populace beyond all socio-cultural and socio-economic classes fuels its popularity (Mazrui, 1986). In Kenya, where football has captured the nation's imagination and is the number one sport (Njororai, 2009), qualification to major tournaments like AFCON 2019 increases the country's interest in watching football. In 2019, 72% of Kenyans were interested in watching the African Cup of Nations competition (GeoPoll, 2019). Further, Kenyans followed many other football tournaments besides AFCON and the World Cup, indicating that football viewership in Kenya is more popular culturally than in other countries (GeoPoll 2019).

Further, Ndero (2016) notes that football fandom's popularity has been accelerated by other socio-economic factors like betting on football competitions, which have become the newest phenomenon among millions of Kenyans. Since SportPesa, a long-time market leader in sports betting, entered the Kenyan market back in 2014, the Betting and Licensing Control Board has licensed up to 99 betting firms as of 2022 (Business Daily, 2022), and nearly 60% of Kenyans aged 18 and over have placed bets on football matches in the past. (Omondi, 2021).

Yet, with increased local interest in football, the number of consumers subscribing to pay-TV channels that exclusively broadcast its most popular product is falling in Kenya. Multichoice Group reports that the number of top-tier customers subscribed to DSTv, Showmax, and GOTv in Rest of Africa (market outside South Africa) decreased by 10%, from 1.2 million to about 900,000 (Fin24, 2021). At the start of 2018, Kenya had 169,698 subscriptions to pay-TV/cable channels. These subscription numbers had fallen to 88,616 at the end of 2021 (Communications Authority 2022). Given the popularity of football in Kenya as a sport and as a gambling tool and the increased public interest in live football broadcasts of European and global competitions, this study intends to establish why pay-TV subscriptions in Kenya are falling while interest in the sport is increasing.

## 1.6 Objectives of the Study

The objectives of the study

i. To establish the most preferred and least preferred sports tv channels in Kenya.

ii. To determine the reasons for audience preferences of each pay-TV provider.

iii. To establish the current state of subscriptions to pay-TV channels.

**1.7 Justifications**

Traditionally, terrestrial and satellite technology were the only means to watch live sports broadcasts in Kenya, and audiences have only known one way of accessing exclusive football broadcasts. However, research and industry surveys done recently have shown that more and more respondents are unsubscribing from their satellite pay-TV subscriptions as the number of streaming services and subscriptions continue to increase. Many of these streaming services offer access to the same live broadcasts as pay-TV/satellite tv (Burch, 2017).

Notably, technological advancements appear to have accelerated consumer behaviour change, allowing them flexibility and easy access to premium sport broadcasts (Kariyawasam, 2017). Indeed, newspaper reports and social media commentary suggest that Kenyan audiences are moving away from traditional channels of viewing sport to towards digital technologies which involve internet streaming on handheld phones, tablets, and devices that can connect to the internet (Business Daily, 2020).

This study is motivated by the recent entries into the market of global streaming giants like NBA Tv, Netflix, and F1TV, the latest being Amazon video-on-demand (The Standard, 2022), and the response by existing pay-TV providers like DSTv and StarTimes to launch their own versions of streaming services like Showmax (Showmax, 2022). Given the ongoing discussions among Kenyans online regarding the impact of these new market entries and news reports, this study intends to present evidence of whether, as suggested by industry observers, this development has affected pay-TV subscriptions. In essence, how do audiences choose their preferred sports broadcaster in light of new players in the industry?

Indeed, besides figures released by the Communications Authority of Kenya every quarter documenting the number of subscriptions to pay-TV, no published studies based on audience behaviour explain the changes in subscription numbers. Further, the convergence of broadcasting, new technology, and human behaviour is a novel study area yet to be fully explored.

Findings from this study will provide pragmatic insight into the current pay-TV climate and likely future industry outcomes. These findings can then be used by broadcast and technology industry students, watchers, and decision-makers to innovate, adjust, survive, and grow their market share in the high-stakes broadcasting market. Lastly, it is inconceivable that there is very thin scholarship literature on football and football broadcasts, given its popularity in Kenyan society as a social activity, an entertainment tool, a business, and a bona fide industry on its own. This study is a modest effort that hopes to fill the gap.

**1.8 Research Questions**

While Kenyan media consumers mostly use radio, followed by free-to-air television (Oriare et al., 2010), audiences access football broadcasts through pay-TV providers at a fee. In studying the consumption of audiences in Kenya, this research aims to answer the following questions: -

1. Which is the most preferred live sports broadcaster in Kenya?
2. What influences a pay-TV preference?
3. What are the causes of the current state of pay-TV subscriptions in Kenya?

**1.8 Research Hypothesis**

It has been suggested that pay-TV providers would lose subscribers without football content. The first hypothesis tests if there's a direct correlation between live football broadcasts and pay-TV subscriptions in Kenya.

Secondly, the worsening global and local economy affects how consumers purchase subscriptions. The second hypothesis seeks to test whether the cost of pay-TV directly affects the consumer's choice of the broadcast channel (pay-TV, streaming) that audiences use to watch live football consumption.

Lee, Lee, and Brown (2017) and Elias (2019) contend that accessibility, availability, and increasingly cheap broadband data have resulted in customers switching to over-the-top television (OTT TV) services, wanting to watch what they want when they want, and at affordable prices or no cost at all compared to pay-TV. The third hypothesis tests whether new media and media technologies are increasing access to live football broadcasts in Kenya.

**1.9 Scope**

This study took place in Kenya's 5 major urban centres such as Nairobi, Mombasa, Kisumu, Nakuru, and Eldoret, which had the highest concentration of pay-TV, free-to-air tv, and broadband access (Kenya National Bureau of Statistics, 2020). It used a representative sample of 200 Kenyan adults with active pay-TV subscriptions and had access to free-to-air television and broadband services for 5 years from 2018 – 2022. The sample represented the cumulative population of 8,418,198 Kenyans subscribed to pay-TV during this period. The study collected responses from male and female adults interested in sports, whether through playing or watching television. The study concentrated on the main pay-TV, streaming, and terrestrial broadcasters of live sport in Kenya, like DSTv/Supersport, Showmax, and GOTV, as well as StarTimes, Zuku, and K24.

**1.10 Limitations**

Obtaining subscription data from pay-TV channels is difficult. Multichoice Kenya, Zuku, and StarTimes do not publicly share their subscriber numbers. The companies did not respond to the researcher's requests for these data despite several attempts. However, the study relied on data from the Kenya National Bureau of Statistics and the Communications Authority of Kenya, which periodically collect and disseminate such data.

The study also relies on convenience sampling rather than a scientifically chosen random sample. The format of the survey questionnaire may also skew the results given the different levels of education and access to the internet that the targeted demographic might have. In mitigation, the questionnaire provided wide demographic variables to control for potential biases in the results. The researcher also used stratified sampling to ensure that the sample included diverse participants.

# CHAPTER II: LITERATURE REVIEW AND THEORETICAL FRAMEWORK

## 2.1 Evolution of Sports Broadcasting and Audience Consumption – From Press to Peer-to-Peer Broadcasting

In tracing the rapid evolution of sports broadcasting, Schultz (2002) observes that no industry changes quite as quickly as telecommunications. New technologies are developed and introduced daily to the industry, making previously accepted standards nearly obsolete. Perhaps, even more importantly, human culture continues to evolve rapidly, creating even more uncertainty. This change is reflected through sports broadcasting as the industry exists within human culture. From the days of the press to radio and the early days of television, sports broadcasting was still very primitive, not just in technology but also in presentation and format.

As with other forms of organized broadcast media, the press is the oldest method of routinely updating the public about sports. Sports teams have always been very interested in print media coverage, with newspapers serving as the main source of information about upcoming events and the outcomes of previous ones. Information on upcoming events boosted attendance and helped sell newspapers along with the outcomes of earlier events. Lamprecht and Stamm identified sports pages in daily newspapers, sports papers, and magazines (with broad subjects or specialized in particular forms of sports), and periodicals produced by sports clubs and associations as the three categories of print media that audiences scoured for sports updates (Lamprecht & Stamm, 2002).

At the turn of the 20$^{th}$ century, sports sections gained importance due to the growing popularity of sports like baseball in the United States and football and cycling in Europe. At that time, telegraph transmission made it feasible to broadcast sports news outside the local region, enabling widespread participation in far-off athletic events for the first time in history.

Schultz (2002) records how television transformed how professional football is organized, played, and spectated. After the World Wars, technology improved in the 50s, allowing sports programming to thrive. Audiences also looked for new ways of entertaining themselves as they rebuilt their lives after the wars. Broadcasters started to realize the appeal of sports on television to the audiences. However, the first television sets were a complicated mass of wires and tubes and did not produce a good picture. Additionally, tv sets were expensive to acquire for the common person. Thus, television started as a "tavern" medium. Bar owners would buy a set for their taverns, which became the centre for viewing and public conversation. And more often than not, the taverns featured sports programs for their primarily male clientele (Schultz, 2002).

The following period could be "the real turning point" in the connection between television, sports broadcasts and audiences. Gradually, analogue and mechanical technologies were replaced with digital-convergent electronics (Boyle, 2017). The demand for the immediacy of live football broadcasts increased given its popularity among the working class. Live screenings across the globe began and new technical devices purposely engineered for live broadcasts, including the introduction of slow-motion replays, were seen for the first time (Chisari, 2006, p. 42).

Indeed, the seeds of what audiences watch in today's live football broadcasts took root during this period. Extended highlights programme *Match of the Day* was first transmitted in 1964 and has remained a fairly regular feature of English football broadcasts replicated worldwide. Every week, local television broadcaster K24 transmits a football highlights show that broadly follows the format of *Match of the Day*. However, television was limited to the number of games it could broadcast at any given time. Legal restrictions brought about by selling broadcast rights also limited the reach of the live broadcast.

Today, these limitations of sports broadcasts on television are being laid bare by the emergence of technologies like peer-to-peer streaming in the information age. Streaming through peer-to-peer (P2P) networks involves the use of computers that are linked together and can communicate with each other independently without the presence of a third-party server. It has become a popular form of online consumption of football broadcasts whereby one person can share content with another person online without any personal interaction (Haynes, 1998), a far cry from the days when audiences could only gather in bars to consume sport.

P2P streaming became popular in the music industry as it allowed music file sharing. It has now transcended music to become a preferred option for accessing movies, television shows and sports. Indeed, this broadcast process has been linked to the rise of globalisation and the increasing interconnectedness between people, governments, corporations, and organisations across national boundaries (Kariyawasam, Tsai 2017). It has allowed Kenyan football fans, legally or otherwise, to circumvent territorial broadcast restrictions imposed by traditional pay-TV broadcasters like DSTv and StarTimes.

### 2.2 Audience Preferences of Sports Broadcasters in Kenya

Whittle's (2018) study on online streaming of live sports suggests that for all age groups and genders, television is still the main source of viewing sports, which is a circumstance that is unlikely to change in the future, as users can access streaming content on their televisions via apps and streaming boxes. Momanyi (2014) supports Whittle's (2018) view regarding audience preference for tv programmes. In his narration, Momanyi notes Kenya's digital migration has increased the number of television channels available to the audience providing them with more choices than ever before.

Momanyi (2014) suggests that audiences rely on their initial preferences like sports and entertainment to decide what to watch and what TV channel. In general, he posits, Kenyan audiences prefer pay-TV channel providers, particularly DSTv, as it gives a wider choice of news, entertainment, music, and sports programming in a far much better quality of images and sound. Kenya's relatively advanced Pay-TV market remains the popular choice in providing the audience with globally popular sports content. Oriare et al. (2010) agree with Momanyi noting that while Kenyan media consumers mostly use radio and free-to-air television as their first source of information, audiences can access niche sports content like European football mainly from two pay-TV providers - DSTv and StarTimes - albeit at a fee charged daily, weekly, monthly, or yearly.

### 2.3 Supersport and Broadcasting Rights

Multichoice is the industry leader in providing sports in Sub-Saharan Africa through its satellite tv provider DSTv, which exclusively broadcasts Supersport. The acquisition of broadcasting rights for elite European football competitions is at the heart of Multichoice's strategy to attract audiences. Additionally, Multichoice has also ventured into purchasing broadcast rights to African football leagues. For instance, Multichoice purchased the broadcasting rights to the Nigerian Football League in 2006 (allAfrica.com, 2006).

Similarly in Zambia, Supersport agreed to a broadcast deal with the league in 2007. A year later, Supersport televised the Kenyan Premier League (KPL) in 2008 and in Ghana, the company and the Ghana Football Association inked a contract in 2013 (McPherson, 2013). Not only have such partnerships entertained audiences in the comfort of their homes, but they have also increased football match attendance in local stadia.

This mix of local and international football broadcasts allows Supersport to reach African audiences through football, unlike any other medium. Siundu (2011) suggests that football, as a leisure activity, allows youths a chance to imagine themselves as being more than what they are in material and socio-economic terms. His study examines the various ways in which the phenomenon of English football broadcasts has provided a canvas upon which many Kenyan youth can confront their lived experiences and desired aspirations.

He acknowledges the popularity of European football locally and beyond, particularly in the manner that it has generated a set of cultures that connect with other advances in the construction and consumption of leisure as it competes with film, music and other engagements. While Siundu (2011) suggests that these broadcasts provide a space for youths in areas like Mumias, Kakamega and Kisumu to imagine themselves in terms of masculine, class and pan-African identities, his study falls short in examining how youths in these areas regularly access these broadcasts given the options available in the market.

### 2.4 Factors Influencing the Choice of Broadcaster

Highly attractive 'premium' programming, especially live coverage of popular sports events and recent Hollywood movies, drives consumer choice (Weeds, 2016). The demands of the viewer, the substance and timing of these programs, the language of the programs, channel loyalty, the viewer's personality and mood, and the impact of groups are some particular elements that also affect the decision-making of viewers. According to Gutman's (1978) theory of media exposure, respondents choose particular programs to suit their requirements. There are two main schools of thought in program choice research i.e. program choice is connected to program scheduling and program choice is related to content.

Other theories contend that audience duplication affects channel choice. That if two broadcasts fall under the same broad category, viewers of that genre are more likely to watch both. According to the hypothesis of "audience duplication," viewers of Program A will also watch Program B, regardless of the channel or hour. This assumes that viewers who enjoy one program of a certain type will also enjoy all subsequent programs of that sort. However, research by Webster (1985) demonstrates that this is not always the case. The research found that the time and duration of a program's scheduling characteristics had an impact on program choice.

### 2.5 Broadcasting Market Forces

Because of a rise in demand from more broadcasters, the visibility of televised sports material has expanded over the previous several decades. As a result, media rights payments have climbed as well. As a result, the expenses for the authorization to show an event and the number of airing times have climbed dramatically. Public and private broadcasters, on the other hand, have different goals. Commercial broadcasters are profit-oriented. Conversely, public service broadcasters are more interested in promoting a wide variety of programming and showcasing high-quality content. It is something that many public service broadcasters (such as KBC) exist for while commercial broadcasters use such content to raise their advertising and subscription revenue by selecting the best football content to broadcast leaving the audience no choice but to bear the brunt of commercial interest by pay-TV providers. Indeed, by making such content available exclusively to its subscribers, a distributor gains market share from its rivals, making exclusivity potentially attractive as a competitive strategy.

Unfortunately, the study is scarce on the factors that impact broadcasters' selection of matches to broadcast. Forrest (2005) studied the preferences of British broadcasters for English Premier League games. Broadcasters favoured contests between local rivals, matches held on weekends, and contestants for the Premier League title or qualifiers for the European Championship League. Commentators gave more attention to games that were more unpredictable and had a bigger total but a smaller pay differential between the two clubs. Forrest (2005) investigated broadcasters' choices for EPL matches based on a five-season data set and found similar outcomes (Forrest, 2005).

## 2.6 Determinants of Viewership for Sport

### 2.6.1 Proximity

Regarding viewership, Tainsky and McEvoy (2012) suggest that distance harmed demand for viewership especially when no local team matches were televised. Hotelling's (1929) location model states that demand is dependent on the distance between the ideal consumer and the product. In essence, products that are far away from a consumer turn out to be less ideal as the associated costs of accessing those products may increase. Studies done before have shown that an increase in the distance negatively affects the demand for the product/service (Forrest & Simmons, 2002; Lemke et al., 2010). Further, this study suggests the effect could be related to substitution behaviour, whereby, sports fans switch their favourite teams based on the distance of their homes to the sports team.

On the contrary, Siundu's study notes how European football broadcast in Kenya has powerfully captured youthful audiences, distance notwithstanding. He notes the historical rise in popularity of English football can be explained by several factors including the decline in the influence of the local teams, the spread of satellite televisual technology together with the league's massive advertisement campaigns, and the emergence of a youthful population that don't identify with old ethnic narratives and competitions of local teams. Thus, he notes, Kenyan youth invest emotionally in the performance of their teams, to the point of getting attached to "their teams" achievements or failures. According to Richard Giulianotti (2005), fans have a stronger and more intense sense of commitment to their teams, so much so that they stick with them even when their teams' fortunes take a turn for the worse.

### 2.6.2 Uncertainty of Outcome

Rottenberg's (1956) "ambiguity of outcome assumption" has spawned a large body of study on sports spectators' inclinations and tastes (Jung et al., 2020). Indeed, his concept has been included in many pieces of literature on viewership to better understand fans' reactions to unpredictable outcomes. Fans watching games on television, for example, prefer matchups that are tightly contested or unpredictable, according to Buraimo and Simmons (2009) and Cox (2018) (Jung et al., 2020).

According to Chung et al. (2016), the audience's expectations of outcome uncertainty differed from those held before and throughout the game (Chung et al., 2016). Fan reaction to expected winning probabilities (i.e., expectations of result ambiguity) was more pronounced before a match (Chung et al., 2016). Still, the response to actual variations in winning possibilities was more pronounced after the game. A similar study by Ryu et al. (2019) found that the more viewers tuned in, the more uncertain the result of matches was (Ryu et al., 2019). Jung et al. (2020) also discovered that audiences were less enthused when their favourite team had a better chance of winning (Jung et al., 2020). However, when the underdog provided better signs that they could win, no such impact was observed.

### 2.6.3 Star-attraction

According to Jung et al. (2020), a team's popularity is influenced by various factors, including its marquee players, the proximity between it and its rivals, the intensity of its rivalry, and the length of time the team has been around (Jung et al., 2020). The superstar effect, for starters, is defined by a small number of respondents producing a significant return on their highly valued talent. For instance, in football, a select group of players who demonstrate on-field skills are often paid more than other less-gifted footballers, making them a vital commodity (Jung et al., 2020). Furthermore, marquee players create externalities for their respective clubs and the league. Michael Jordan's worth to the NBA was assessed by Hausman and Leonard (1997) to be more than 50 million dollars, more than any other player in the league (Jung et al., 2020). A similar impact can be seen in the interests generated by superstars like Cristiano Ronaldo and Lionel Messi in world football.

### 2.6.4 Rivalries

Siegelman (2008) notes how the use of inclusive phrases like "our team," in conversations implements soccer as a way to define and differentiate a larger community. Using the example of Kenya and Uganda's national teams, Siegelman explores how football generates tribalism, offering a way to separate Kenyans from non-Kenyans and to directly compare Kenya to other countries. Even the failures of the Kenyan soccer team are compared to the successes of regional and global rivals. These comparisons create a sense of community among audiences.

Literature implies that competition can increase fan engagement in matches, which is relevant to distance. The term “rival” is defined differently in each league: history, geographical closeness, meeting frequency, and resemblance all impact the establishment of rivalries. Sung et al. (2017) argued that sports competitions’ intensity, direction, and length should be included in-demand research (Sung et al., 2017). In other words, while studying the effects of rivalry, it is necessary to evaluate how passionately or not each team’s supporters have the same feelings about the hostility and how long the competition has existed.

Finally, teams that have been around for a more extended period have a more significant influence on fan loyalty and, therefore, attendance (Coates & Humphreys, 2005). It is more probable that a club that has been around for a long time would have a loyal following. Since fan loyalty is correlated with increased demand, preceding demand investigations have utilized club age as a benchmark to gauge the influence of supporter allegiance on the market.

### 2.6.5 Quality of Broadcast

Baccarne, Evens, and Schurrman (2013) studied the growth of streaming services in Belgium. The study identified factors such as the video quality of the broadcasts that are key in determining the success of such services. Audiences that watch live broadcast games not only care about the final results or the scores of these games, they care about the story and the progression of the game as both of those aspects are often unpredictable. The immediacy of sports broadcasts is a key attraction for audiences. Therefore, they look for the most seamless broadcast to watch their sport.

Supersport introduced its first HD channel in 2013 (Digital TV Europe, 2013), and seven further HD stations in 2014. (Digital TV Europe, 2014). Engaging commentary, player or fan interviews, and match analysis coordinated with visuals, music, and other pre-recorded elements before the transmission has turned broadcast coverage of football on Supersport into a narrative that sets the agenda for audiences consuming the broadcast.

## 2.7 Factors affecting pay-TV subscriptions

### 2.7.1 Cost and Convenience

Global trends have changed pay-TV consumer viewing habits. According to Lee, Lee, and Brown (2017) and Elias (2019), consumers have shifted to over-the-top television (OTT TV) services because they want to watch whatever they want, when they want, and for as little money as possible in comparison to pay-TV. This is because OTT TV services are more accessible, available, and affordable than traditional TV. Additionally, with audiences seeking convenience first, Elias (2019) argues that consumers are quickly adapting to new technologies to view content because of price and the improved quality of content compared to pay-TV.

Udoakpan and Tengeh's (2020) article examining the impact of over-the-top television services on pay-TV subscription services in South Africa finds that although there is a growing trend of consumers migrating from pay-TV services to OTT TV services, that migration has little or no impact on pay-TV services. This is in stark contrast to Kenya, where data from the Communications Authority shows that subscriptions to pay-TV services in Kenya have drastically fallen over the past 5 years. The study also identifies two types of audiences – cord-shavers and cord-stackers.

Cord-shavers are those that downgrade premium pay-TV subscription services for lower packages without wholly cancelling services and cord-stackers combine their subscription with pay-TV subscription services owing to the inability of OTT TV services to offer the elite sport. Likewise, both phenomena have been mentioned in Kenyan media reports as a growing trend. Lastly, the researchers draw the conclusion that, rather than being a replacement for pay-TV services, OTT TV services are a supplement to it, with each offering having its own distinct benefits. While this might be true of content like movies, television shows and music that can be found in various forms on different OTT platforms, football broadcast is particularly unique in that it offers a singular advantage i.e. it's only broadcast live once and on one channel.

### 2.7.2 Ease of Access

An investigation by Keogh, Davidoff, Freeman, and Lessiter (2001) into attitudes regarding technology, digital media, and media consumption, in general, was done in the UK. The research examined the user-friendliness features of digital media, such as PCs and interactive TV, as well as the challenges associated with implementing streaming media technologies. According to Keogh and colleagues (2001), the perceived or actual "ease of use" of media streaming capabilities may act as a barrier to adoption. They examined the usefulness of several technological applications, ranging from TV to PCs, using cluster analysis. There was considerable uncertainty over whether internet streaming would have a cannibalizing impact on existing cable networks after reviewing the research done by Cha and Chan-Olmsted (2012).

Many business executives questioned the impact this would have on television as our technology and infrastructure for video streaming grew, with some even claiming it would completely replace it. The purpose of Cha and Chan-(2012) Olmsted's study on this topic was to ascertain if the new medium (digital media) will replace or enhance the traditional one (cable). The study by Cha and Chan-Olmsted (2012) helped to show the "basic functional parallels" between cable and internet streaming, as well as the linkages that result from each.

More recent research has concentrated on the elements that promote this adoption in light of the rising online media consumption from sources like streaming services or websites. In addition to examining user motives for choosing online media over conventional TV, Bondad-Brown, Rice, and Pearce (2012) also took into account user age, generation, and contextual age.

The paper made the surprising discovery that instead of dividing their time between all of the media possibilities accessible to them, consumers build smaller subgroups of options and only consume media from those smaller subsets. An intriguing discovery throughout, one of the main factors driving respondents to switch to streaming services is that the availability of channels can be more precisely matched to consumer preferences. Nielsen Company conducted a similar, simpler study that revealed that households only used 14% of the channels made available to them through cable (Nielsen, 2009).

### 2.7.3 Covid and subscription numbers

Sport is one of the disciplines that most felt the effects of Covid-19, as all sporting activities were cancelled during the pandemic. Channels dedicated exclusively to sports broadcasts found it difficult to keep audiences engaged. Lopez et al. (2020) study on Hungarian MTVA's sports channel M4, shows how the channel made use of its archives and chose to reproduce past sports events which held a special meaning to the Hungarians, such as their 3-0 victory over Brazil in a football match in 1986. Indeed, Supersport with the same commitment to nostalgia replayed previous football tournaments, programmes and content that had attracted audiences in the past like World Cup matches, Champions League games and Premier League matches. However, studies show that the pandemic impacted the number of pay-TV subscribers. In the US for instance, 1.8 million subscribers cancelled their pay-TV because of unemployment, high subscription fees, and the lack of live sports (Variety, 2020).

## 2.8 Theoretical Framework

### 2.8.1 Uses and Gratifications Theory

This theory examines why and how audiences use different media. It's applied when measuring consumers' motivation for using their chosen media platforms like television, smart phones, magazines and newspapers. Developed originally in the 1940s and reintroduced by Katz, Blumler and Gurevitch (1974), this theory suggests that individual values, social roles, and life circumstances are important factors that shape how, and which media are consumed by an audience (Danesi 2017). The theory suggests that viewers act reasonably, guided by singular thought processes and needs, by gratification sort and acquired (Rubin and Windahl, 1986).

Uses and gratification theory has five core elements. Firstly, it suggests that the audience is motivated by reasons and purposes as they consume media. It is goal-oriented. For example, and in the case of this study, audiences may watch live sport tv to fill their evenings or weekends, to be entertained or to be informed about the goings on in the world of sports. Consumption of sports has become as much a social activity as it is a psychological one. Audiences consume sports to fit in, relieve stress, get entertained, to escape (Rubin, 1983).

Secondly, the audience is proactive regarding media use and not the broadcaster. In this sense, the media selected, and the needs met are determined by the audience (Katz, et al., 1974). Certain audiences may want the ability to control live sports broadcasts as and when they receive the broadcasts. Given that pay-TV services have technologically evolved to provide audiences with the ability to pause and rewind live sports broadcasts, it can be a need that draws audiences away from FTA broadcasts to pay-TV providers.

Thirdly, there exists competition for broadcasters in meeting the needs of the audience. In the case of this study, the audience has an option of going to the stadium to physically watch live sports – distance permitting. The audience also has various over-the-top broadcasters and streaming services to choose from to meet their needs and gratification (Katz, et al., 1974). Individually, a consumer may want the freedom to select from a wide variety of content available to them. Paying for tv provides a wide variety of options compared to free-to-air broadcasting, radio, or even physically going to a game. One can flip different channels.

The sage goes, "In broadcasting, ratings in king". Broadcasters pore over audience numbers and trends. They dissect the demographic distribution of viewers – young, old, female,

male, etc – to understand and package broadcasts that respond to their needs. This is the fourth feature of the uses and gratifications theory. Through social listening on social media, focus groups, surveys and interviews, broadcasters of live sport tv know the finest details of their audience consumption status, trends and habits.

The fifth aspect of the theory states that judgements about the cultural importance of mass media should be paused while the audience determines their meaning (Katz, et al., 1974). Respondents are affected differently by the same media content, based on their ideas and what they want to do with the media. Bilandzic and Patrick (2004) argue that active and passive viewing are not mutually exclusive but are in themselves endpoints of a continuum of audience activity.

Consumers may move from one medium to another and end up picking one over the other influenced by the satisfaction of specific needs. For instance, they may choose to watch free-to-air broadcasts and forgo subscription-based tv based on the need to fulfil and receive gratification from these services. This study seeks to understand the behaviour of the audience while accessing live sport tv through the Uses and Gratifications theory.

### 2.8.2 The Theory of Technological Determinism

The Theory of Technological Determinism states that media technology shapes how individuals in a society think, feel, act, and how society operates as we move from one technological age to another (McLuhan, M. 1962). The human race has experienced four major technological transitions that can be traced from tribal to literate to print and finally to electronic all of which have shaped humanity. This theory is attributed to Thorstein Veblen (Hauer, 2017), who suggested the link between technology and the society in which that technology is applied. Veblen suggested that any social change is attributed to technology, technological development, communications technology and media. Because of the technology we interact with, we learn, feel and think the way we do because of the messages we receive through the existing technology.

At the inception of broadcasting, radio required us to only listen and develop our sense of hearing. The television era then engaged and developed both our hearing and visual senses which we then transferred into our everyday lives repeatedly reinforcing the behaviour. With the growth of the internet that began at the tail end of the 20$^{th}$ century, there is no need for an audience to gather around a television to listen to the radio or watch a live broadcast of football as before.

Globally, traditional broadcasts of football that were exclusive to state-owned terrestrial broadcasters have declined as audiences have shifted their consumption habits. In the 80s and 90s, perhaps the only way to access content was through singular broadcasts on television and radio followed by newspaper reports the following morning. Today, circulation for print has fallen and so has time spent listening to the radio and watching television (McNair, 2016), both phenomena that can be attributed to the alternative ways that audiences consume sport.

Most of the exclusive football content is available online through the official platforms of exclusive rights owners and, illegally, on streaming websites that hijack and broadcast signals from the aforementioned rights owners. Further, the industry creates additional content that is exclusively for the internet to serve the consumption behaviours of the audience as shaped by technology as well as corporate sponsors.

Like any new technology, the advent of new media has been anticipated to herald the end of traditional media before it (Bullard, 2013) by sending "a signal to the world that old media empires are modern-day dinosaurs headed for extinction". On this basis, media and technology observers have argued that digital streaming spells doom for the existing pay-TV model broadcast (Leichtman Research Group, 2022).

Further, proponents of technological determinism theory argue that any negative consequence of technological development is a result of poor use by the respondents and not of the specific nature of technology. Sports broadcasting ill-fated dalliance with 3D broadcasting failed to excite audiences in 2010 (Pope, 2020).

Through technological determinism, this research intends to understand the behaviour of Kenyan audiences towards consumption of exclusive sports broadcasts available on pay-TV channels in the face of the emergent digital technologies.

# CHAPTER 3: METHODOLOGY

## 3.1 Methodology

Research methodology is the process of reviewing scientific research; it is a plan for logically employing several techniques to systematically address the research question (Goddard & Melville, 2004). This section describes the procedures employed, their limitations, assumptions and presentation of the study.

## 3.2 Research Approach

The study employs a mixed-methods approach. It combines quantitative and qualitative techniques. While key informant interviews yield qualitative information, the dissemination of self-administered questionnaires collects quantitative data. This combination strategy guarantees a thorough analysis of the research issues, enhancing the study's conclusions with a variety of viewpoints and data sources.

Further, through an exploratory research approach, the study allows for a comprehensive examination of a topic that has not received much attention: the effect of new technologies on legacy media consumption, with a focus on pay-TV services. This methodology is very suitable for exploring previously unexplored domains, providing chances to uncover novel perspectives and achieve a thorough comprehension of audience conduct and inclinations.

## 3.3 Research Design

Given that this study explores a relatively under researched topic in Kenya, it employed an exploratory research design. Indeed, exploratory design would allow the researcher to approach the topic from a fresh perspective i.e., the influence of new technologies on consumption of legacy media. The design will allow the researcher to primarily gather information directly from subscribers and key informants through a survey in order to generate new and emerging insights regarding audience behaviour towards pay-TV services as impacted by new technology.

### 3.4 Study Population

The study population is the total number of pay-TV subscribers in Kenya between 2018 and 2022. According to Kenya National Bureau of Statistics Economic Survey 2023, there was a total of 8,418,198 commercial and household pay-TV subscriptions in the past 5 years. Therefore, the population of the study was 8,418,198.

#### 3.4.1 Sample Size

To respond to research questions (i) and (ii), the study involved a representative sample of 200 Kenyan adults who’ve had access to pay-TV, free-to-air television, and broadband services in the defined five-year period i.e., 2018-2022. This sample represented the 8,418,198 Kenyans subscribed to pay-TV.

Although there are no rigid guidelines on selecting a sample size for interview studies, researchers have proposed some very loose guidelines. For example, Brinkmann [2013] suggests that qualitative interview studies should typically have no more than 15 participants. To respond to research question (iii), this research limited the number of key informant interviews to 6. The study was done for a period of three months beginning July 2023 to September 2023.

### 3.5 Sampling Technique

This study employed both purposeful sampling and non-probability sampling techniques. Purposeful sampling technique was employed to respond to research questions (i) and (ii) regarding audience preferences of live sports broadcasters in Kenya and what influences such preferences. Particularly, this study used stratified purposeful sampling. The 5 major urban centres in Kenya with the highest number of pay-TV subscribers i.e., Nairobi, Mombasa, Kisumu, Nakuru and Eldoret served as the strata as follows.

| Region | Subscribers | Percentage | Sample Size |
|---|---:|---:|---:|
| Nairobi | 607,186 | 56% | 112 |
| Nakuru | 164,329 | 15% | 30 |
| Mombasa | 152,695 | 14% | 28 |
| Kisumu | 83,264 | 8% | 16 |
| Eldoret (Uasin Gishu) | 80,911 | 7% | 14 |
| **TOTAL** | **1,088,385** | **100%** | **200** |

*Table 3.3: Stratified Random Sampling (Data sourced from KNBS Economic Survey 2023)*

As demonstrated in Table 3.3, the strata utilised in the stratified purposeful sample were established by taking into account the distribution of pay-TV subscribers across Kenya's 5 biggest metropolitan centres according to the Kenya National Bureau of Statistics Economic Survey 2023. The percentages in the table show how many people subscribed in each urban centre over the given time period (2018–2022) in comparison to the total number of subscribers. Nairobi had the majority of Pay-TV subscribers across the 5 years equivalent to 56% of the study population. The researcher therefore allocated 56% of the questionnaires to respondents in Nairobi i.e., 112 out of 200 questionnaires. Nakuru was allocated 30 out of 200 questionnaires equivalent to 15% of the study population. Mombasa, 28 questionnaires equivalent to 14%, Kisumu 16 questionnaires equivalent to 8% and Eldoret 14 questionnaires equivalent to 7% of the study population.

To investigate research question (iii) regarding factors behind reduced TV subscriptions, the non-probability sampling technique used for the study was purposive sampling. The researcher identified key informants from Kenya’s three major pay-TV providers i.e., DSTv, StarTimes and Zuku. The study selected two key informants each from the pay-TV providers for a total of 6 key informants. These officers were from the pay-TV providers' Marketing and Technical departments.

Further, in selecting the sample, the researcher ensured that there was a fair representation of household and commercial subscribers across the defined strata. The urban centres with the highest population produced the highest sample for the study and the urban centres produced the fewest as shown in table 3.1.

Convenience sampling was used to include individuals from the target population who could be identified as pay-TV subscribers. Household pay-TV subscribers were identified by the satellite dishes installed in their homes. Commercial pay-TV subscribers were identified through observation as they would publicly showcase sports content e.g., bars, restaurants and hotels that broadcast sports content and were open to the public.

**3.6 Data Collection Tools and Methods**

The study employed two methods of data collection. To investigate research questions (i) and (ii), the study used self-administered questionnaires. The questionnaire employed had both online and offline versions (See Appendix)

The questionnaire was broken down into four sections: Part I provided overall details about the participants; Part II asked questions about the preferences for specific sports tv channels and the reasons for such preferences; Part III asked questions about viewing choices of content on multiple channels, and Part IV aimed to find reasons behind reduced TV subscriptions. The questionnaire contained both structured and unstructured questions. The unstructured questions contained counter-check questions that were used to test the objective responses from the structured questions. They also enhanced the ability to make recommendations from the findings of the study.

To investigate research question (iii), the study obtained data through key informant interviews. These were administered in person. The interview questions were laid out in an interview schedule (See Appendix). The researcher was supported by 3 assistants who volunteered to help identify, distribute and collect questionnaires to pay-TV subscribers.

The questionnaires were distributed to the participants physically in Kisumu, Nakuru, Eldoret and Mombasa. In Kisumu, the researcher visited households in Lolwe Estate and Kibos where he distributed and collected the questionnaires to respondents in person. In Nakuru, the researcher visited Section 58. In Eldoret, the researcher visited Langas Estate. In Mombasa, the researcher employed his extended family who distributed the questionnaires in Bamburi and its environs. Because of limited time, resources, and the vast distances of places in Nairobi, the researcher distributed the questionnaires through Google Forms on Gmail. The researcher collected the distributed questionnaires on the same day once the selected participants completed them. Data processing then followed. Only after thoroughly examining the questionnaire for any incomplete details was the data reviewed.

112 questionnaires were distributed online and 88 were distributed physically.

### 3.7 Data Analysis and Presentation Methods

For online responses, the study used Google Forms' inbuilt analysis tools to analyse the results. Data from offline responses were entered into Google Forms for analysis. Tables, histograms and Explanatory narratives were the primary method of data presentation.

### 3.8 Ethical Considerations

Ethics are defined moral guidelines that direct research from its initiation to its completion and dissemination of findings. Walliman (2014) notes that observing research ethics throughout the study benefits everyone involved from the researcher himself, to the population sample being studied, the awarding body and the consumers of the study. Indeed, adhering to ethical principles provide a credible basis for the research stand.

For this study, all the appropriate ethical principles were followed, as outlined by Connelly (2014). Before venturing out, the researcher was granted permission from the University to conduct a study. Informed consent was adequately obtained before the research began and all participants received complete and correct information about the study. For respondents to have an educated choice on whether or not to engage in the research, they were informed of the general nature of the study.

In addition, the study maintained the participants' identities and confidentiality. No personal information about the respondents who participated in the research was disclosed. Regarding data privacy, no one received the information provided by respondents. Moreover, the respondents had the choice of declining answering to the questionnaire. The safety of the volunteer’s information was also guaranteed during the research.

# CHAPTER 4: DATA ANALYSIS AND INTERPRETATION

The quantitative data examined in this chapter is presented through frequency and percentage distributions based on 200 valid responses. The qualitative data is presented through narrative format.

## 4.1 Demographic Information

### 4.1.1 Age Distribution

The data examined the distribution of respondents' ages by exhibiting frequency and percentage distributions based on 200 valid responses from a range of ages. The age group 25-34 years were the most frequent subscribers to pay-TV with 81 respondents (40.5%) followed by age group 35-44 years which had 47 subscribers (23.5%). 18-24 years had 35 subscribers (17.5%), 45-54 years had 24 subscribers (12%), and 55-64 years had 13 subscribers (6.5%). This age distribution suggests that young and middle-aged adults subscribe to pay-TV more frequently than any other age group.

| | N | % |
|---|---|---|
| 18-24 years | 35 | 17.5% |
| 25-34 years | 81 | 40.5% |
| 35-44 years | 47 | 23.5% |
| 45-54 years | 24 | 12% |
| 55-64 | 13 | 6.5% |

*Table 4.1.1: Age distribution of the respondents*

### 4.1.2 Gender Distribution

The second question sought to identify the gender distribution of the respondents. The total percentages show how the respondent group's gender distribution progressed over time. 72 out of 200 respondents identified as female representing 36%, compared to 128 male respondents (74%). This finding suggests that men are more interested in subscribing to pay-TV than women are. The researcher noted that women deferred the responsibility of providing responses to the male figure in their household as they were more likely to clearly understand and respond to the subject of the study.

| | N | % |
|---|---|---|
| Female | 72 | 36% |
| Male | 128 | 74% |

*Table 4.1.2: Gender of respondents*

**4.1.3 Level of Education**

The data set shows the frequency and percentage distribution of participants' level of education. The study found that two respondents (1%) had no formal education, 2 respondents (1%) had completed primary school. 38 respondents (19%) had TVET education, 104 respondents (52%) had earned a university degree and 54 respondents (27%) had postgraduate education. From the findings, it was established that an overwhelming majority of pay-TV subscribers and sports watchers have obtained formal education. The majority of pay-TV subscribers and sports fans, according to the survey, have completed formal education.

| | N | % |
|---|---|---|
| No formal education | 2 | 1% |
| Primary School | 2 | 1% |
| TVET | 38 | 19% |
| University Degree | 104 | 52% |
| Postgraduate Education | 54 | 27% |

*Table 4.1.3: Education levels of the respondents*

**4.1.4 Employment Status**

57.6% of the respondents are employed, 19.5% are self-employed, 11.5% are students, and 11.5 % are unemployed. The study's disclosure of the respondents' job status—a significant percentage of whom are employed—highlights the critical role that employment plays in determining an individual's ability to purchase pay-TV services.

| | N | % |
|---|---|---|
| Student | 23 | 11.5% |
| Out of work | 23 | 11.5% |
| Employed | 115 | 57.6% |
| Self-employed | 39 | 19.5% |

*Table 4.1.4: Employment status*

**4.1.5 Individual Incomes**

By displaying frequency and percentage distributions based on 200 verified responses, the study found that 45 respondents (22.5%) earned less than Kshs 15,000 monthly, 24 respondents (12%) earned between 15,0001-35,0000, 45 respondents (22%) earned between Kshs. 35,001 - 75,000. 24 respondents (12%) earned between Kshs. 75,001 - 100,000 and 62 respondents earned above Kshs. 100,000. The wide variety of income levels among the respondents—many of whom make over Kshs. 100,000—indicates the variation in financial capability among the study group.

| | N | % |
|---|---|---|
| Less than Kshs. 15,000 | 45 | 22.5% |
| Between Kshs. 15,001 - 35,000 | 24 | 12% |
| Between Kshs. 35,001 - 75,000 | 45 | 22.5% |
| Between Kshs. 75,001 - 100,000 | 24 | 12% |
| Above Kshs. 100,000 | 62 | 31% |

*Table 4.1.4: Individual Income Levels*

**4.2 Audience Consumption of Pay-Television**

**4.2.1 Most Consumed Sports Broadcasts**

The information examined the specific sports broadcasts that were the most popular amongst the respondents by displaying frequency distribution. In order of preference, 160 of the respondents preferred watching the English Premier League. The UEFA Champions League was the second most preferred by 131 respondents while Motorsport (Formula 1, MotoGP, and Safari Rally) was the third most popular sports broadcast 71 respondents. The Olympics were preferred by 41 while 33 respondents preferred the World Athletics Championships. The data clearly shows that the main attraction in sports broadcasting is football content. The English Premier League, The UEFA Champions league and other European Leagues are the most preferred broadcasts.

The study's examination of the most popular sports broadcasts, how frequently sports broadcasts are viewed each week, and the preferred sports broadcast medium offers insightful information on the viewing habits and preferences of the public.

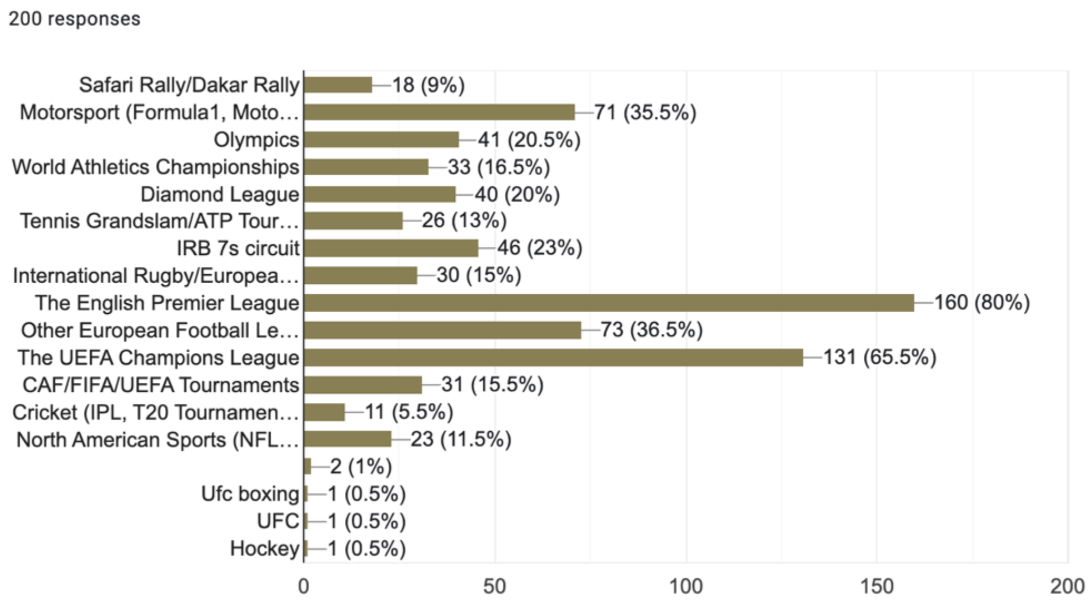



*Table 4.2.1: Respondents preferences of specific sports broadcasts*

### 4.2.2. Number of Sports Broadcasts Watched per Week

The question examined how frequently respondents consumed their favourite sporting events per week either by listening in to radio or watching on tv. The distribution of frequency of seeing or listening among the 200 valid responses is as follows. In one week, 16% of respondents consumed their favourite sports broadcasts at least once. 21.5% tuned in at least twice in a week, 27% at least thrice; 13% at least 4 times and 22.5% watched their favourite sport content 5 times or more in a week. The fact that more than half of the respondents choose to pay for a TV or mobile app subscription in order to watch sports broadcasts highlights how important cost and accessibility factors are when determining which subscriptions to purchase.

| | N | % |
|---|---|---|
| One | 32 | 16% |
| Two | 43 | 21.5% |
| Three | 54 | 27% |
| Four | 26 | 13% |
| Five | 45 | 22.5% |

*Table 4.4.2: Number of times sports broadcasts are watched/listened to per week*

#### 4.2.3 Respondents Most Preferred Sports Broadcast Medium

The question examined the most preferred sports broadcast medium in Kenya. The distribution of frequency among the 200 valid responses is as follows. Pay-TV broadcasts was the most popular form of broadcast preferred by 84 of the respondents followed by streaming broadcasts consumed on computers/mobile phones by 35 respondents. 26 respondents preferred terrestrial television, 25 preferred paid streaming services, 17 respondents preferred video showrooms, only 2 preferred radio broadcasts.

| | N | % |
|---|---|---|
| Radio (AM/FM/Digital broadcasts like Spice FM, BBC Radio) | 2 | 1% |
| TV (through terrestrial and OTT broadcast like K24, and KBC) | 26 | 13% |
| Pay-TV (DSTv, StarTimes) | 84 | 42% |
| Mobile Phone/Tablet – (paid streaming services like Showmax) | 25 | 12.5% |
| Computer/Laptop (unpaid streaming websites) | 33 | 16.5% |
| Video Showrooms (Kibanda) | 17 | 8.5% |
| All of the above | 13 | 6.5% |

*Table 4.2.3: The most preferred sports broadcast medium*

#### 4.2.4 The Most Preferred Sports Broadcast TV Channel

The question inquired what the most popular sports broadcaster is in Kenya. Of the 200 valid responses gathered, data shows that Supersport on DSTv was the most preferred broadcaster with 57.5% of responses (115 respondents), followed by illegal online streaming at 20%. Showmax was preferred by 9% (18 respondents), GOtv by 8.5% (17 respondents), K24 at 3% and StarTimes Sport at 2% (4 respondents).

| | N | % |
|---|---|---|
| K24 | 6 | 3% |
| StarTimes Sport | 4 | 2% |
| Supersport on DSTv | 115 | 57.5% |
| Showmax | 18 | 9% |
| GOtv | 17 | 8.5% |
| Online Streaming | 40 | 20% |

*Table 4.2.4: Most preferred sports broadcast tv channel*

### 4.2.5 Reasons for Preference to Specific Sports Broadcasters in Kenya

The data offered provides a thorough understanding of why respondents in Kenya favour particular sports broadcasters. Based on a verified answer count of 200, the split of reasons for choice is varied: some respondents (3%) value a wide range of sports channels, while others are drawn to Premier League coverage (4%), clarity (5%), and accessibility (10%). For some people, the availability of their preferred material (4%) and the ease of accessible (10%) are important factors. The cumulative percentages show the increasing percentage of respondents who attribute their preferences to particular elements. This dataset insight provides a comprehensive overview of the factors influencing people's choices for certain sports broadcasters in Kenya.

| | N | % |
|---|---|---|
| A variety of channels broadcasting sports | 6 | 3% |
| Premier league coverage | 8 | 4% |
| clarity | 10 | 5% |
| My favourite is on it | 4 | 2% |
| Accessibility | 20 | 10% |
| I can pay for DSTv | 8 | 3.4% |
| Clear picture, very good transmission and variety of football | 9 | 4.2% |
| cost | 20 | 10% |
| Streaming is easily accessible anywhere | 8 | 4% |
| Hustle-free, I don't need the Internet, I get everything in one place | 4 | 2% |
| Best coverage, Clarity, easily accessible | 4 | 2% |
| Convenient | 16 | 8% |
| It has variety shows | 6 | 3% |
| it is cheaper | 8 | 4% |

| | | |
|---|---|---|
| I use internet and subscribe to Showmax pro. It's cheaper that DSTv | 6 | 3% |
| Accessibility to WIFI | 10 | 5% |
| They have the most diverse collection of sports channels | 7 | 3.5% |
| Its free, readily available. | 7 | 3.5% |
| quality | 7 | 3.5% |
| Actual clarity convenient | 4 | 2% |
| I have it | 2 | 1% |
| I watch at a local joint with a paid DSTv service | 5 | 2.5% |
| I own a pub and DSTV are the only ones with a product that suits the business | 4 | 2% |
| F1TV IS EXPENSIVE | 6 | 3% |
| I like to watch football with friends in our estate | 4 | 2% |
| Value for money | 4 | 2% |
| reliable | 3 | 1.5% |

*Table 4.2.5: Reasons for Preference to Specific Sports Broadcasters in Kenya*

### 4.2.6 TV/Mobile App Subscription

Asked to indicate whether they paid a tv or mobile app subscription to access sports broadcasts, 130 out of the 200 valid responses (65%) said they pay a tv or mobile subscription to access live sport. 84 (35%) of respondents did not pay for a mobile subscription.

The respondents who do not pay a tv/mobile subscription noted that they access broadcasts mostly through internet streaming from different available sites, watching broadcasts in video showrooms, using shared DSTV mobile streaming accounts and only watching broadcasts available on free to air broadcasters i.e. K24.

| | N | % |
|---|---|---|
| Yes | 130 | 65% |
| No | 70 | 35% |

*Table 4.2.6: TV/Mobile app subscription*

### 4.2.7 Respondents' Monthly Spend on Pay-TV Subscriptions

Of the respondents who pay monthly pay-TV subscription, 18 spent less than Kshs. 1000, 63 spent between Kshs. 1,001-3,000, 32 spent between 3,001-5000, 11 spent Kshs 5,001-7000 and 6 spent 7,000. The researcher noted a direct corelation between data aligns with the subscription costs of the package that broadcasts football. The study's disclosure of respondents' monthly pay-TV subscription spending, especially the fact that a sizable portion of them spend less than Kshs. 3,000, highlights the crucial role that cost plays in influencing subscription choices.

| | N | % |
|---|---|---|
| Less than Kshs. 1,000 | 18 | 22.5% |
| Between Kshs. 1,001 - 3,000 | 63 | 12% |
| Between Kshs. 3,001 - 5,000 | 32 | 22.5% |
| Between Kshs. 5,001 - 7,000 | 11 | 12% |
| Above Kshs. 7,000 | 6 | 31% |

*Table 4.2.7: Monthly spend on subscriptions*

## 4.3 Factors Affecting Pay-TV Subscriptions

### 4.3.1 Factors Influencing Choice when Selecting a Sports Broadcaster

The researcher examined the factors that respondents consider when selecting a preferred sports broadcaster. Availability of a respondent's favourite sport broadcast was considered first by 102 respondents, followed by the quality of the broadcast mentioned by 89 respondents. Respondents least considered their safety and the safety of their devices when selecting their preferred broadcast.

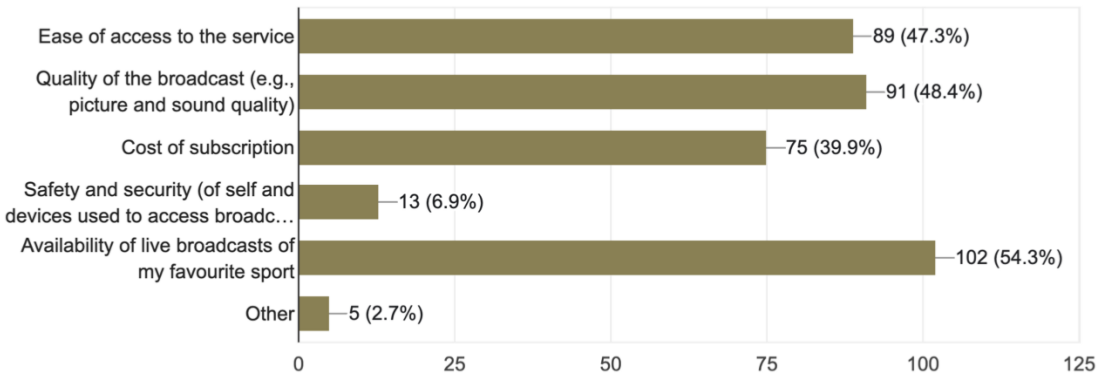



*Table 4.3.1: Factors Influencing Choice when Selecting a Sports Broadcaster*

### 4.3.2 Preferred Means for Watching Sports

101 respondents preferred paying a tv/mobile app subscription to watch their favourite sport (50.5%). 39 respondents preferred watching on phone/computer/tv through unpaid internet streams. The least preferable way of watching sport is by using someone else's subscription on my phone/tablet/tv with only 6 respondents. Watching football in bars, restaurants, and video showrooms is the third most popular with 30 respondents (15%), while 24 respondents preferring free-to-air TV options like K24 and KBC without subscribing to pay-TV (12%).

| | N | % |
|---|---|---|
| I prefer paying a tv/mobile app subscription to watch my favourite sport | 101 | 50.5% |
| I prefer watching my favourite sport in a bar/restaurant/video showroom with pay-TV | 30 | 15% |
| I prefer watching my favourite sport on free to air tv like K24, and KBC and would never subscribe to pay-TV. | 24 | 12% |
| I prefer watching my favourite sport on my phone/computer/tv through unpaid internet streams. | 39 | 19.5% |
| I prefer watching my favourite sport using someone else's subscription on my phone/tablet/tv | 6 | 3% |

*Table 4.3.2: Preferred Means for Watching Sports*

### 4.3.3 Frequency of Pay-TV Subscriptions in the Past 5 Years

In the past 5 years, 22.7% of respondents continued with a pay-TV subscription but at lower costs/packages each month. 21.6% increased the frequency of watching free and unpaid online streams. 33.5% added online subscriptions to an existing pay-TV subscription. 10.2% completely stopped subscribing to pay-TV and 11.9% reduced the frequency of subscription from monthly to once every often.

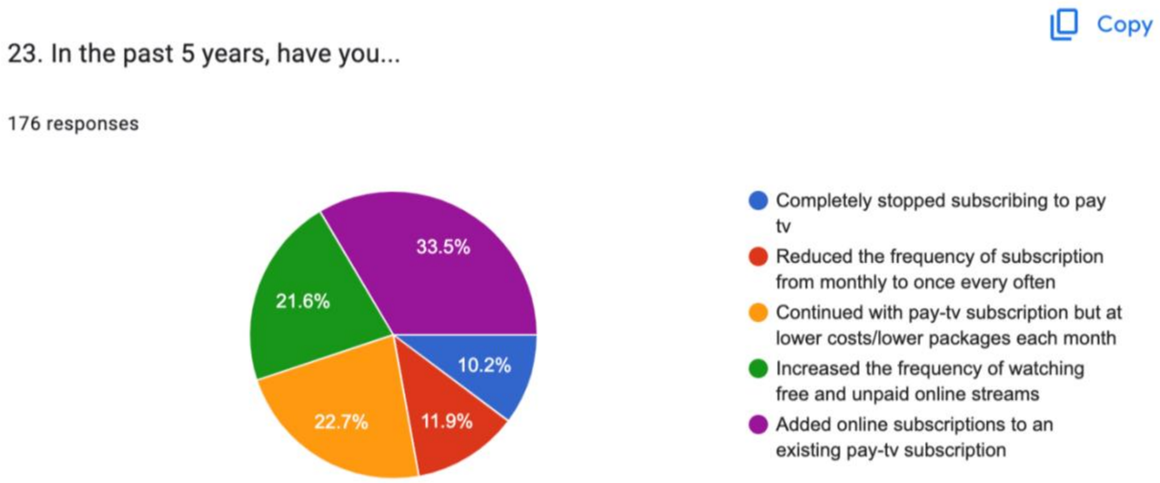



*Table 4.3.3: Frequency of Pay-TV Subscriptions in the Past 5 Years*

### 4.3.4 Audience Behaviour when Subscribing to Pay-TV

The researcher examined the attitude of respondents towards pay-TV subscriptions when accessing their preferred sports broadcast. Of the 200 valid responses, percentage distribution shows that 28% disagree that they subscribe to pay-TV only when their favourite sport is on and 22.5% strongly disagree. 19.1% of the respondents strongly agree that they only subscribe to pay-TV when their favourite sport is on while 17.5% agree. 15% are neutral.

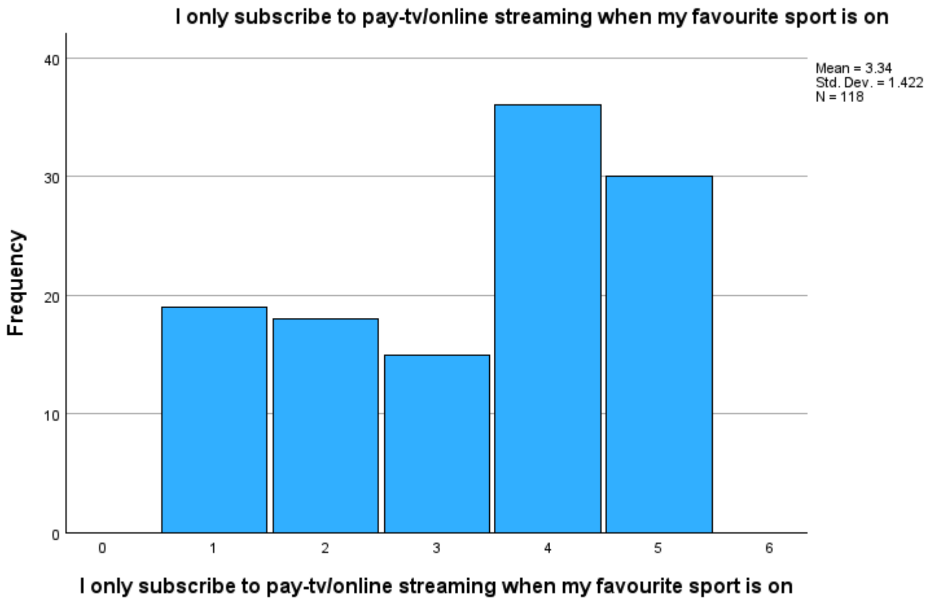



*Table 4.4.4: The Impact of Live Sports Broadcasts on Pay-TV Subscriptions*

When asked whether they subscribe to pay-TV at all times, 37% strongly disagree, 14% disagree, 18.5% agree, 21% strongly agree, and 9.5% are indifferent.

**I subscribe to pay television at all times**

| | N | % |
|---|---|---|
| Strongly Agree | 74 | 37% |
| Agree | 37 | 18.5% |
| Neutral | 19 | 9.5% |
| Disagree | 28 | 14% |
| Strongly Disagree | 42 | 21% |

The information presented examined how respondents consume sports outside of paying for pay-TV. 25.4% strongly agree that they watch sport through other channels that are not pay-TV. 23.7% agree and 9.3% are indifferent. 28.8% disagree with the sentiment and 12.7% strongly disagree.

**I do not subscribe to any pay-TV but watch sports through other channels**

| | N | % |
|---|---|---|
| Strongly Agree | 30 | 25.4% |
| Agree | 28 | 23.7% |
| Neutral | 11 | 9.3% |
| Disagree | 34 | 28.8% |
| Strongly Disagree | 15 | 12.7% |

The researcher inquired about the respondents' opinion on the cost of pay television. 78% of respondents agree that pay-TV costs are too high. 8.4% disagree with the notion while 12.7% are neutral.

**The cost of Pay-TV is too high.**

| | N | % |
|---|---|---|
| Strongly Agree | 80 | 50.8% |
| Agree | 48 | 28.0% |
| Neutral | 27 | 12.7% |
| Disagree | 33 | 7.6% |
| Strongly Disagree | 12 | 0.8% |

Regarding the pricing techniques offered by pay-TV channels, 63% strongly agree or agree that pay-TV providers have not offered more friendly pricing options that justify the content available. 15.5% disagree or strongly. 21.5% are neutral.

**Pay-TV providers have not offered more friendly pricing options that justify the content available.**

| | N | % |
|---|---|---|
| Strongly Agree | 79 | 39.5% |
| Agree | 47 | 23.5% |
| Neutral | 43 | 21.5% |
| Disagree | 20 | 10% |
| Strongly Disagree | 11 | 5.5% |

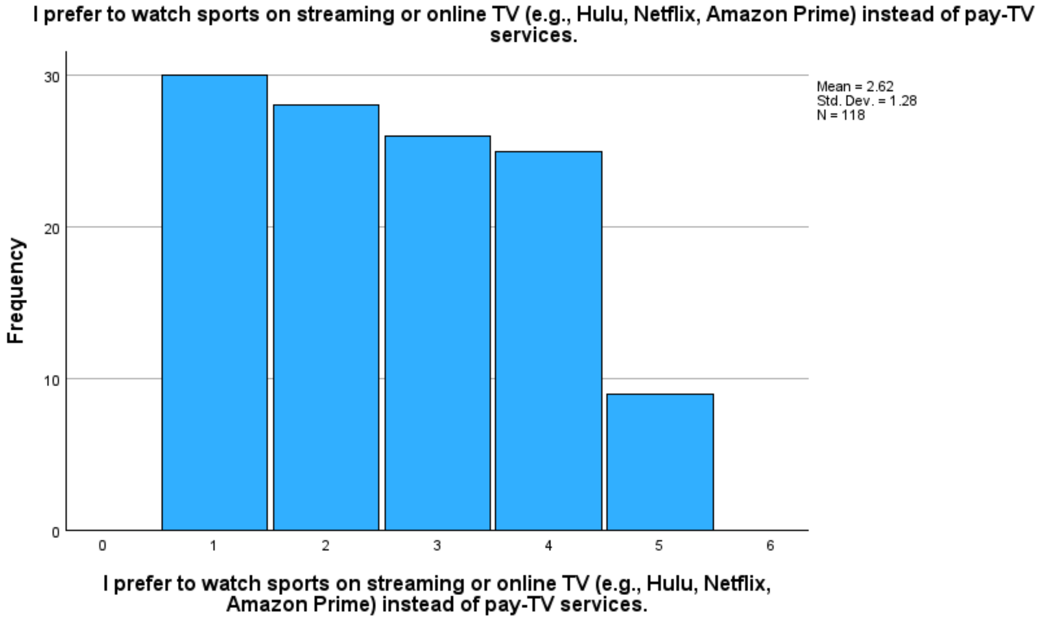
Based on 200 verified responses, 30.5% of respondents strongly agreed that pay-TV providers place greater emphasis on profits. 29.5% agreed, 25% were indifferent, and 15% disagreed.

**Pay-TV providers place greater importance on profits than quality service.**

| | N | % |
|---|---|---|
| Strongly Agree | 61 | 30.5% |
| Agree | 59 | 29.5% |
| Neutral | 50 | 25% |
| Disagree | 30 | 15% |

### 4.3.5 Audience Perception on Streaming vs Pay-TV

The question examined the preference for viewing sports on streaming or online TV platforms (such as Hulu, Netflix, and Amazon Prime) instead of conventional pay-TV services. 30.1% of respondents highly agreed, 28.7% agree, 24.0% are indifferent, 22.2% disagree, and 8.6% severely disagree.




The researcher inquired whether the respondents have considered affordable and competitive alternatives to pay-TV subscriptions. 14.5% of the respondents strongly agreed, 23% agreed. 29% disagree, 12% strongly disagree and 21.5% are indifferent.

**I have found affordable, competitive choices of pay-TV providers in my area.**

| | N | % |
|---|---|---|
| Strongly Agree | 29 | 14.5% |
| Agree | 46 | 23% |
| Neutral | 43 | 21.5% |
| Disagree | 58 | 29% |
| Strongly Disagree | 24 | 12% |

### 4.3.6 Convenience Accessing Pay-TV and Online Streaming

While 34.5% of participants still find watching live sports on pay-TV convenient, about 31% of participants perceive internet streaming to be more time-efficient. Additionally, 18.5% like the convenience of watching sports online on different platforms, and 10% choose a hybrid strategy that combines pay-TV at home with live streaming when they're out and about. 6% of the replies were incomplete or labelled system-related, illustrating the diversity of viewpoints on this issue. The study's analysis of how convenient people believe pay-TV and internet streaming services to be provides insightful information about how media consumers make decisions.

**Comparison between the preference for online live streaming and pay-TV**

| | N | % |
|---|---|---|
| Compared to the time I have to invest in watching sports, the use of online live streaming for sports content is beneficial to me compared to pay-TV. | 62 | 31% |
| I find it convenient to watch live sports content via pay-TV. | 69 | 34.5% |
| I find it convenient to watch live sports online on any device. | 37 | 18.5% |
| I find it convenient to use pay-TV when I'm at home and live streaming when outdoors. | 20 | 10% |
| Missing System | 12 | 6% |

### 4.4 Key Informant Interviews

#### 4.4.1 Roles and Experience of Key Informants

The researcher interviewed 6 key informants working for 3 pay-TV stations. 4 key informants worked in Marketing and Sales Departments of their pay-TV stations. 1 key informant was employed as a Business Unit head and 1 was an Area Technical Manager.

1 key informant had been employed for more than 10 years at the pay-TV company he worked for. 2 key informants had worked between 8-10 years, 2 between 5-7 years and 1 key informant had been employed between 2-4 years.

#### 4.4.2 Highest and Lowest Years in Pay-TV Subscription

5 out of 6 key informants noted that 2022 had the highest number of subscription for the pay-TV channel they worked for. 1 key informant noted that 2018 was the year with the

highest number of subscriptions for the pay-TV they worked for. Indeed, all 6 key informants attributed the increased number of subscriptions to the FIFA World Cup tournaments in 2018 and 2022 as key drivers of subscription numbers. Particularly for 2022, key informants also attributed the spike in subscription numbers to the rebound from COVID-19 pandemic as subscribers reactivated their accounts.

Conversely, key informants overwhelmingly noted that 2021 had the lowest number of subscriptions in the past 5 years. Unsurprisingly, this downturn in subscription was attributed to the effect of the global pandemic, COVID 19.

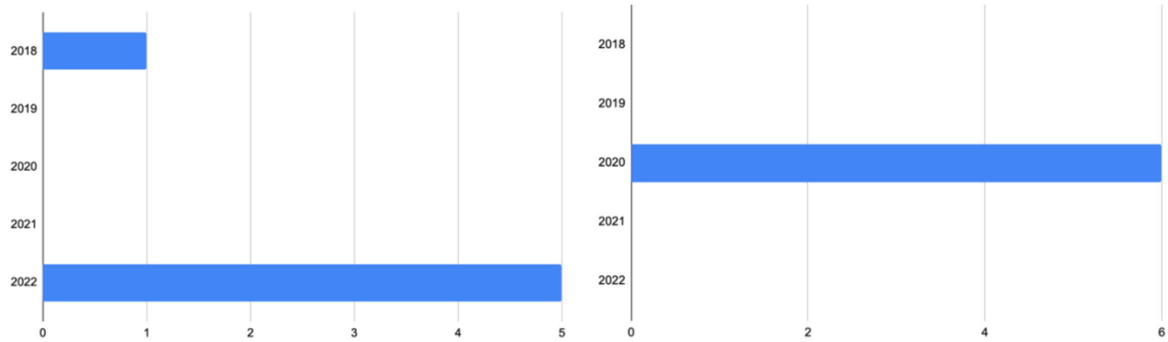



*Table 4.5.2 Year with the highest pay-TV subs – Year with the lowest pay-TV subs*

**4.4.3 Factors Promoting Subscriptions Among Pay-TV Customers**

Key informants suggest that availability of local content within a pay-TV programme schedule promotes subscriptions as subscribers are likely to identify with local sportsmen as well as local productions. The digital migration process that is still taking place in Kenya has also promoted subscription as more subscribers migrate to digital broadcasts from analogue. Lastly, diverse pay-TV packages that contain a spread of content including sport for different income levels has seen at least one pay-TV channel provider increase the number of subscribers in 2022.

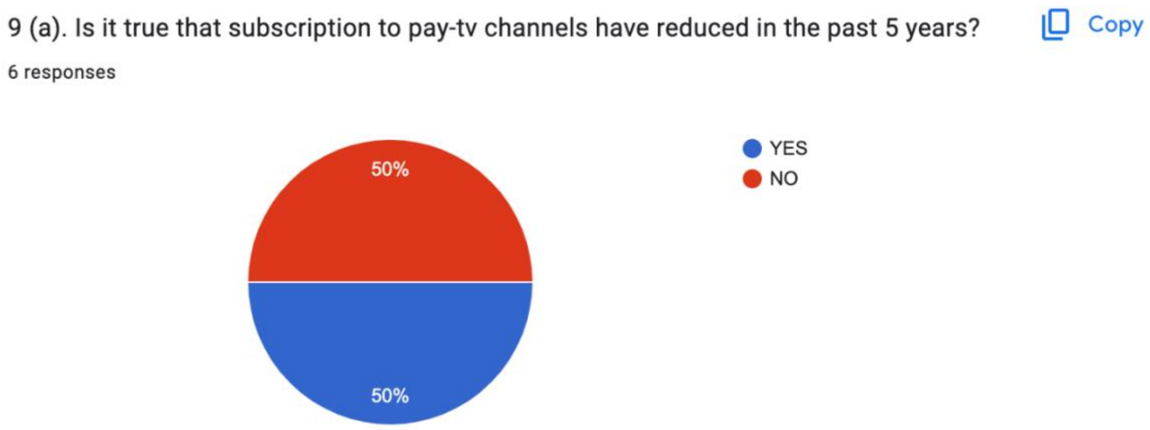
### 4.4.4 Threats to Subscriptions Among Pay-TV Customers

Key informants identify the weakening shilling as a major threat to subscription. One key informant informed the researcher that the shilling to dollar exchange rate affects subscription cost because pay-TV companies purchase content and set the cost of subscription in dollars. These costs are then passed down to the subscriber hence the periodical increase in the cost of subscription. This insight is also directly related to the worsening Kenyan economy and the increased cost of living occasioned by macroeconomic factors beyond pay-TV subscriber's control.

Key informants also noted illegal online streaming and competition from other pay-TV providers in the market as key threats to their customers. Indeed, 2 key informants note, pay-TV success is pegged on ownership of exclusive sports and entertainment content.

### 4.4.5 Subscription Trends in the Past Five Years

3 key informants noted that there had been a decline in subscriptions while 3 others noted that there had been an increase in the number of subscriptions across the 5 years of the study.



### 4.5 Discussions and Interpretation of Key Findings

#### 4.5.1 Demography

Age, individual income and education level play a critical role in respondents' decisions to subscribe to pay-TV to consume sports. Indeed, the findings on individual income agree with previous research by Udoakpan and Tengeh (2020) that shows correlation between educational attainment and pay-TV and sports content consumption. This correlation can be explained by the greater income levels that are often linked to tertiary education, which allow people to purchase pay-TV subscriptions that provide a wealth of sports content. Additionally, educated people are more likely to be aware of the sports information that is available to them and to exhibit deeper passions for sports; this is a phenomenon that is cultivated by the variety of intellectual experiences that they have in educational settings. The results underline the importance of education in forming media consumption habits as well as the impact of awareness, income, and personal interests on viewing choices.

Further, the price of pay-TV and over-the-top (OTT) services is a major factor in determining subscription choices, as was covered in the literature study. Jobs give people the security and money they need to pay for these services, which enables them to interact with a variety of content, including sports broadcasts (Variety, 2020). Employment is a complex element that interacts with economic and lifestyle factors in the context of media consumption. It may also affect the daily routines and free time that people have to watch pay-TV and sports material. This range of income levels supports the results that pay-TV costs significantly influence subscription choices, supporting the current notion that income is a crucial driver in one's capacity to afford pay-TV subscriptions. According Park and Kwon (2019) people who earn more are more likely to be able to afford pay-TV services, which frequently include an extensive and high-quality variety of sports programming. On the other hand, lower income levels might make it more difficult for people to enter the pay-TV industry, which would affect the decisions they make when looking for sports entertainment.

### 4.5.2 The Current State of Consumption of Pay-Television

The ideas of the Uses and Gratifications theory (Blumler & Gurevitch, 1974), which emphasises that viewers are driven by certain wants and deliberately choose media to satisfy those needs, are closely related to the findings on audience consumption. The audience's decisions when it comes to consuming sports content are a reflection of their needs for social interaction, education, and amusement. The study illuminates the dynamic interaction between audience preferences and the media platforms at their disposal by determining which sports broadcasts are most popular, how frequently they are seen, and the preferred distribution methods. This is consistent with the core ideas of the Uses and Gratifications theory, which emphasises the active participation of the audience in selecting the media that best meets their unique wants and desires.

Regarding respondents’ thirst for quality and affordable pay-TV options, the findings agree with the topic covered in the literature, which emphasises price and accessibility as important variables affecting consumers' decisions between pay-TV and streaming services available online (Shishikura et al., 2005). These respondents' decision to pay for subscriptions suggests that they value the quality and dependability of service, even if it comes at a price, and are probably looking for easy access to the sports content they want. This illustrates how the interaction of these important elements in the changing media landscape affects viewer behaviour.

A proactive and selective approach to media consumption is shown by the study's examination of the audience's attitude towards pay-TV subscriptions, which included the discovery that some users only use these services when their favourite sport is being broadcast. The Uses and Gratifications theory, which holds that viewers deliberately select media to satisfy their particular wants and desires, is consistent with this phenomenon (Whittle, 2018). Viewers in this situation are discerning when choosing a subscription, stressing how crucial it is that the material suit their tastes. The aforementioned discovery highlights the growing sophistication of contemporary media consumers, demonstrating their capacity to customize their selections to correspond with their own preferences and needs for satisfaction.

Regarding the cost of subscriptions, the data suggests a significant proportion of members choose less expensive subscription plans, demonstrating a frugal attitude towards their media consumption decisions. This is consistent with the research review's on how subscription fees affect viewer choices (Park & Kwon, 2019). It implies that a lot of customers prioritise cost when making membership/subscription selections since they want to balance getting access to high-quality sports material while keeping an eye on their monthly spending.

### 4.5.3 Factors Affecting Pay-TV Subscriptions

The study's conclusions, which show that respondents significantly prefer internet streaming services over traditional pay-TV, align with the themes discussed in the literature review. Previous research has indicated that consumers are increasingly turning to Over-The-Top (OTT) services to meet their content consumption demands. The fact that people would rather watch material online than via traditional TV shows how media consumption is evolving and how consumers are coming to value the flexibility, accessibility, and wide variety of content that OTT platforms provide. The dynamic character of the media industry is reflected in this, as audiences have come to value the ease and personalization choices provided by internet streaming.

When evaluating and choosing media channels for their own requirements and preferences, viewers take perceived ease into consideration. In a time when consumers have a wide range of options for content access, convenience plays a major role in what they decide to watch. User-friendly interfaces, flexible content scheduling, and simplicity of navigation are all important factors in influencing how viewers feel and act when it comes to media consumption. Media companies may better meet the needs and expectations of their audience by being aware of these convenience aspects.

# CHAPTER 5: SUMMARY, RECOMMENDATIONS, AND CONCLUSIONS

## 5.1 Summary of Findings

### 5.1.1 The Most Preferred Live Sports Broadcaster in Kenya

One name stands out as the most popular live sports broadcaster – DSTV. DSTV owns Supersport channels which has established itself as the go-to destination for sports enthusiasts across the country, with 63.6% of respondents indicating their devotion to this platform. The depth of Supersport's coverage of sports, particularly European football competitions, is the primary reason why DSTv is the most preferred pay-TV provider in Kenya.

This research echoes Tengeh's (2020) findings. The findings are also similar to those of Rono and Mugeni (2019) who found out that Supersport wide choice of sports channels suits a wide range of preferences and interests. With football being the main attraction, other sports like rugby, motorsport, tennis, cricket, athletics or combat sports are also provided by Supersport on DSTv. This extensive coverage guarantees that fans can enjoy their preferred sports content as well as shift seamlessly to other sports broadcasts without changing platforms, offering a one-stop shop for all things sports-related. It confirms hypothesis one which mentions the correlation between live football broadcast and pay-TV subscriptions, indicating that people subscribe to DSTv because of its extensive coverage.

Supersport's coverage is unparalleled in terms of quality. The channels are well-known for high-definition broadcasts, giving viewers a crystal-clear and immersive experience. Ease of access is also a distinguishing trait. Once installed and connected, a user only needs to turn on their tv, select the Supersport channel on DSTv to watch their preferred sports content. It, therefore, appeals to a wide range of consumers and generations through traditional satellite television or seamless internet streaming on devices (Kimani & Iravo, 2017). This inclusion means that sports fans of all demographics may engage passionately with their favourite games without experiencing any impediments (Andai, 2016).

Supersport consistently secures the broadcasting rights to major international sporting competitions. Only once since 2001 has the channel lost the exclusive rights to broadcast the English Premier League, a key content pillar for sports broadcasts. World Cups, Continental tournaments, global competitions like the Olympics and World Athletics Championships broadcast rights are consistently secured by Supersport effectively locking out other broadcasters from the market. It solidifies its position as the ultimate sports destination.

The attractiveness of Supersport on DSTv is also linked to fans' emotional relationships with the channel, resulting in a profound resonance beyond ordinary entertainment. For many people, the experience of seeing great moments unfold on Supersport is deeply woven into the fabric of their sports memories. These emotional relationships produce a strong feeling of devotion and familiarity that goes beyond passive viewing; it turns into a communal adventure, interweaving followers in a shared tapestry of exciting highs and heart-breaking lows (Ford &Tamir, 2014).

It is critical to acknowledge that sports broadcasting tastes are subjective and influenced by various circumstances. While Supersport on DSTv is clearly a giant in the sector, sections of the community may prefer alternatives depending on their particular circumstances and preferences. Free-to-air options like K24 and KBC may hold a particular place in the hearts of individuals who value accessibility over budgetary restraints. Additionally, the digital era has introduced online streaming services that cater to the desires of individuals who want to fit their sports consumption with their modern, networked lifestyles. This complicated interaction of preferences highlights the dynamic and diversified world of sports broadcasting, where numerous platforms cater to a wide range of tastes, allowing viewers to construct their own personalised sports experiences.

### 5.1.2. Factors Influencing Pay-TV Preference

A complex mix of factors shapes pay-TV preferences with each factor catering to individual requirements, interests, and the need for convenience. The availability of desired programming is a critical factor that substantially influences pay-TV preferences. The breadth of offers available from a pay-TV provider has the potential to persuade people towards or away from a certain platform (Kohli, 2019).

This research identified coverage of major football events like the World Cup strongly influences pay-TV preferences. In 2022 when the FIFA World Cup was held, subscription numbers increased.

The quality of the viewing experience is also an important factor. Signal quality, image resolution (whether HD or 4K), sound quality, and the service's constant stability have all influenced subscribers towards their product.

Cost and price are also crucial in the landscape of pay-TV preferences. Consumers carefully assess the expense of a subscription against the perceived value they stand to receive in terms of content, features, and overall watching experience. DSTv have provided different packages with different content in an attempt to adapt to individual preferences, and clear invoicing practices (Rono & Mugeni, 2019). Indeed, the study discovers that customers want both enjoyment and financial prudence. It is noteworthy that a majority of respondents spent between Kshs. 3001-Kshs. 5000 per month on subscription. This finding aligns with the cost of DSTV's package that offers football content. This finding proves hypothesis two, which argues that consumers assess the subscription cost against the value they receive and that suppliers that provide competitive pricing and flexible packages tend to attract subscribers.

### 5.1.3 Causes of Decline in Pay-TV Subscriptions

The decline in subscriptions in 2020 can be attributed to the 2020 COVID-19 global pandemic. As key informants noted, respondents lost jobs and business ground to a halt which resulted in pay-TV budget being cut to make room for more essential household expenses. The lack of live football matches due to lockdowns in Europe meant that respondents did not see the need to subscribe to pay-TV.

Further, the data shows that while some respondents discontinued their pay-TV subscriptions entirely, others reduced their frequency of subscriptions by opting for lower-cost packages or online streaming alternatives as internet became cheaper. Furthermore, respondents are increasingly supplementing their pay-TV subscriptions with internet streaming services, indicating a rising preference for a hybrid approach to content consumption. These subscription behaviours highlight the ephemeral nature of the media ecosystem and how consumers adjust to new alternatives and technology (Lee et al., 2021).

The development of internet streaming and the availability of more economical options have altered how people consume and interact with sports material. This data not only reveals shifting consumer tastes and priorities but also underscores the necessity for broadcasters and service providers to adapt and provide flexible solutions that accommodate these changing behaviours.

## 5.2 Recommendations

1. Pay-TV providers should take note of respondents' beliefs that providers prioritise profits over excellent service. To maintain consumer happiness and loyalty, it is critical to balance profitability and providing high-quality content and service.
2. Pay-TV providers should prioritise providing a diversified choice of channels and programming that caters to a wide range of interests. This includes investing in local content. Viewers' tastes can be strongly influenced by the availability of desired programming, particularly sports material.
3. Pay-TV companies should prioritize the quality of the watching experience to draw and keep consumers. To fulfil the demands of contemporary audiences, this involves providing high-definition broadcasts, reliable signals, and exceptional audio-visual quality.
4. Providers need to evaluate their pricing policies to ensure that subscription fees reflect the perceived value of the products and services they offer. Affordable prices, adaptable packages, and clear invoicing procedures can improve client satisfaction.
5. Pay-TV companies need to be quick to adjust to shifting consumer preferences. To accommodate a variety of consumption habits, providers should think about providing hybrid solutions that mix traditional pay-TV with online streaming. The increase in online streaming services suggests a shift in tastes.
6. Broadcast industry regulator and internet providers should introduce stricter laws to curb illegal streaming of sports content.
7. Industry regulator should insist on the redistribution of exclusive sports content across the pay-TV channels.

## 5.3 Conclusion

Audience behaviour is drastically shifting as new and emerging technologies challenge the existing status quo of pay-TV. However, audiences are still tied to pay-TV because of the exclusive content provided by the pay-TV channels. Indeed, the study research confirms that DSTv is Kenya's preferred pay-TV broadcaster precisely because the pay-TV company owns exclusive broadcast rights to the most popular sports content in the region. The excellent quality of broadcasts as well as ease of use is important for audiences as well.

Pay-TV subscriptions are also influenced by economic factors. While considered an essential entertainment choice by many households, loss of income caused by macro and microeconomic factors poses a threat to subscriptions. Households cut spending on pay-TV subscriptions and consider illegal streams due to increased cost due to weakening local currencies as well as reduced household income due to factors like global health pandemics.

In conclusion, the dataset provides insightful information into the complex world of pay-TV choices and consumer behaviours, highlighting the significance of a diverse, high-quality content offering, competitive pricing, and flexibility to accommodate shifting viewer tastes in the modern media landscape.

## 5.4 Areas for Future Research

This study is specifically about sports content on pay-TV, particularly football. Future research can be done on other forms of entertainment content on pay-TV like Movies, documentaries, music and television series.

Further, this study was specific to pay-TV broadcasts of sports content. Future research can be done on free-to-air broadcasters and how their audiences consume sports content therein.

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## Appendix

## Questionnaire

Hi,

I am an MSc. Communication Studies student at the University of Nairobi. An important part of my coursework involves conducting a research study on Audience Consumption Patterns of Pay-Television: The Case of Live Football Broadcasts in Kenya

This questionnaire intends to collect data on the state of consumption of Kenyan audiences who watch football regularly. Kindly provide the most truthful responses and where possible, share as many responses as you find relevant. I do not wish to use the data collected in any other way but for this study only and I will accord utmost privacy and confidentiality to the information you share. Thank you.

***SECTION 1***

**Have you been subscribed to any pay-TV service at any point between 2018 and 2022? (If YES, proceed with the rest of the questions)**

YES

NO

**1. In what age group are you?**

18-24 years

25-34 years

35-44 years

45-54 years

55-64

65+

**2. Which sex are you?**

Female

Male

Other

**3. What is your highest academic qualification?**

No formal education

Primary School

TVET

University Degree

Postgraduate Education

**4. What is your employment status?**

Student

Out of work

Employed

Self-employed

**5. What was your entire individual income in the past month?**

Less than Kshs. 15,000

Between Kshs. 15,001 - 35,000

Between Kshs. 35,001 - 75,000

Between Kshs. 75,001 - 100,000

Above Kshs. 100,000

***SECTION 2***

**6. Which sports broadcasts do you consume the most?**

Safari Rally/Dakar Rally

Motorsport (Formula1, MotoGP, Safari Rally)

Olympics

World Athletics Championships

Diamond League

Tennis Grandslam/ATP Tournaments

IRB 7s circuit

International Rugby/European Club Rugby

The English Premier League

Other European Football Leagues

The UEFA Champions League

CAF/FIFA/UEFA Tournaments

Cricket (IPL, T20 Tournaments, The Hundred)

North American Sports (NFL, NHL, Basketball, Wrestling)

Other…

**7. How many broadcasts of your favourite sport in (6) above do you watch/listen to in a week?**

One

Two

Three

Four

Five or more

**8. What broadcast medium do you use to access your most preferred sport?**

Radio (AM/FM/Digital broadcasts like Spice FM, BBC Radio)

TV (through terrestrial and OTT broadcast like K24, and KBC)

Pay-TV (DSTv, StarTimes)

Mobile Phone/Tablet – (paid streaming services like Showmax)

Computer/Laptop (unpaid streaming websites)

Video Showrooms (Kibanda)

All of the above

**9. Which is your most preferred sports broadcaster in Kenya?**

K24

StarTimes Sport

Supersport on DSTv

Showmax

GOtv

Online Streaming

**10. Please provide at least three reasons for your answer in (9) above**

**11. Do you pay a tv/mobile app subscription to access live sports broadcasts?**

Yes

No

**12. If YES in (11) above, how much do you spend per month to watch your favourite sports broadcast on tv/mobile?**

Less than Kshs. 1000

Between Kshs. 1001-3000

Between Kshs 3001-5,000

Between Kshs. 5,001-7000

Above Kshs. 7,000

**13. If NO in (11) above, how do you access sports broadcasts?**

**14. Do you place bets on your favourite sport?**

Yes

No

**15. If YES in (14) above, which of these statements is true?**

I subscribe to pay-TV so that I follow bets

I do not subscribe to pay-TV because I use that money to bet instead

I bet and subscribe to pay-TV at the same time without feeling any financial burden

I pay subscription through bet winnings

Betting and subscription to pay-TV are unrelated issues to me

***SECTION 3***

**16. To what extent do you agree with the following statements?**

| | Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|---|

| |
|---|
| I only subscribe to pay-TV/online streaming when my favourite sport is on |
| I subscribe to pay television at all times |
| I do not subscribe to any pay-TV but still I watch sports through other channels |
| I use family/friends' subscriptions to watch my favourite sport |
| I am subscribed to all channels that broadcast my favourite sport |

**17. Considering the options available to you, what influences your choice when selecting a sports broadcast?**

Ease of access to the service

Quality of the broadcast (e.g., picture and sound quality)

Cost of subscription

Safety and security (of self and devices used to access broadcast)

Availability of live broadcasts of my favourite sport

Other

**18. Which of these statements do you agree with?**

I prefer paying a tv/mobile app subscription to watch my favourite sport

I prefer watching my favourite sport in a bar/restaurant/video showroom with pay-TV

I prefer watching my favourite sport on free to air tv like K24, and KBC and would never subscribe to pay-TV.

I prefer watching my favourite sport on my phone/computer/tv through unpaid internet streams.

I prefer watching my favourite sport using someone else's subscription on my phone/tablet/tv (using a subscriber account to watch football)

**19. In addition to your pay-TV subscription, do you also have a subscription to an online streaming service such as Netflix, Prime, NBATV, F1TV?**

Yes

No

***SECTION 4***

**20. Which of the following sports broadcast services, if any, do you currently subscribe to? Please select all that apply.**

StarTimes

DSTv

Showmax Pro

GOtv

None of the above

Other

**21. How often have you paid for the subscription(s) above in the past 5 years?**

Always

More often than not

Often

Less often than not

Never

**22. What level of importance do you place on subscribing to watch your favourite sport?**

Very important

Fairly Important

Important

Somewhat important

Not important

**23. In the past 5 years, have you...**

Completely stopped subscribing to pay-TV

Reduced the frequency of subscription from monthly to once every often

Continued with pay-TV subscription but at lower costs/lower packages each month

Increased the frequency of watching free and unpaid online streams

Added online subscriptions to an existing pay-TV subscription

**24. To what extent do you agree with the following statements**?

| | Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|---|
| The cost of Pay-TV is too high | | | | | |
| Pay-TV providers have not offered more friendly pricing options that justify the content available. | | | | | |

| | |
|---|---|
| Pay-TV providers place greater importance on profits than quality service. | |
| I prefer to watch sports on streaming or online TV (e.g., Hulu, Netflix, Amazon Prime) instead of pay-TV services. | |
| I have found affordable, competitive choices of pay-TV providers in my area. | |

**25. In your case, which of these statements are true?**

Compared to the time I have to invest in watching sports, the use of online live streaming for sports content is beneficial to me compared to pay-TV.

I find it convenient to watch live sports content via pay-TV.

I find it convenient to watch live sports online on any device.

I find it convenient to use pay-TV when I'm at home and live streaming when outdoors.

Thank you for your response. Kindly reach out to 0720321730 via text or a call to collect the questionnaire.

**Interview Schedule**

**Audience Consumption of Pay-Television: The Case of Live Football Broadcasts in Kenya**

1. What is your position at the pay-TV company you work for?

2. How long have you worked at the pay-TV company?

3(a). Between 2018 and 2022, which year had the highest number of subscriptions at the pay-TV company you work for?

3(b). What reasons do you attribute to your answer in Question 3(a) above?

4 (a). Between 2018 and 2021, which year had the lowest number of subscriptions at the pay-TV company you work for?

4(b). What reasons do you attribute to your answer in Question 4(a) above?

5. What are the factors that promote subscriptions among pay-TV customers?

6. What are the factors that threaten subscriptions among pay-TV customers?

7. What are the opportunities for future subscriptions?

8. What are the threats for future subscriptions?

9 (a). Is it true that subscription to pay-TV channels have reduced in the past 5 years?

Other…

9. If YES in 9(a) above? Kindly explain why.

Thank you for your response. Kindly reach out to **0720321730** via text or a call to collect the questionnaire.