UNIVERSITY OF NAIROBI

SCHOOL OF JOURNALISM AND MASS COMMUNICATION

CONSUMPTION PATTERNS OF LOCAL PROGRAMMES ON PAY TELEVISION IN KENYA: A CASE STUDY OF ZUKU TELEVISION

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A RESEARCH PROJECT SUBMITTED TO THE SCHOOL OF JOURNALISM AND MASS COMMUNICATION OF THE UNIVERSITY OF NAIROBI IN PARTIAL FULFILMENT OF REQUIREMENTS FOR THE DEGREE IN MASTER OF ARTS IN COMMUNICATION STUDIES

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DECLARATION

This research project is my original work and has not been presented in and/ or to any other forum or audience, in any other university or examination body.

Signed…………………………………… Date…………………………..

 OTIENO OUKO DENISH

 K50/79545/2012

This research project has been submitted for examination with my approval as the supervisor.

Signature ………………………………… **Date**…..………………………..

DR. SAMUEL SIRINGI

DEDICATION

I dedicate this work to my father Mr. Jonathan Otieno and my late mother Mrs. Roselyn Otieno for their support towards my education. To my family, your love, concern, encouragement and enthusiasm has made me to come this far and achieve this goal. Thank you all.

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RESEARCH OPERATIONAL DEFINITIONS

Film/Movie: A recorded motion picture that is telecast for 30minutes and above.

Programme: Body of live or recorded material consisting of images, sound or both which can be broadcasted.

Nudity: Consists of frontal or rear camera exposure, above and below the waist for both sexes.

Sexual Activity: Is an act performed with another for sexual gratification and may include foreplay.

Restricted Access: Film/movie, programme which is prohibited for sale to the public or to individuals due to the negative morals it is perceived to support.

Video: System of recording, reproducing or broadcasting moving visual images on or from video tape.

Classify: This is to assign something to a class/category according to shared/common qualities.

Broadcasting: This is unidirectional conveyance of sound or television programme whether encrypted or not by, radio or other means of telecommunication for reception by the public.

Free-to-air- television channels: Television channels which broadcast their signal without encryption and capable of being received by conventional broadcasting receiving apparatus.

Pay television: Television broadcasting in which viewers pay by subscription to watch a particular channel.

Digital Content (e-content): Local content which is disseminated and accessed using digital means.

Broadband: High capacity (able to carry a lot of data per second, rather than the particular speed of data), always on internet connectivity.

Broadcaster: Any legal or natural person who composes or packages or distributes television or radio programme services for reception by the public or sections of the public or subscribers to such a service, irrespective of the technology used.

Local Content: Television programme whose conceptual framework, plot of the story, scene represent Kenya's socio-cultural, political and religious ideologies.

Subscriber: A person who has entered into an agreement with a Pay television provider to subscribe to radio or television service at a monthly fee.

Telecast: Slotting of a given programme in the play list for broadcast.

Wincabel: Management software that keeps subscription data of all Zuku customers.

ABBREVIATIONS

NTV	**:**	Nation Television
KTN	**:**	Kenya Television Network
KBC	**:**	Kenya Broadcasting Corporation
CA	**:**	Communications Authority of Kenya
FTA	**:**	Free to air television channels
BCAC	**:**	Broadcasting Content Advisory Council
KFCB	**:**	Kenya Film Classification Board
CCK	**:**	Communication Commission of Kenya
STB	**:**	Set Top Box
n	**:**	Total number
ZSPL	**:**	Zuku Satellite Subscription Platform
ZCPL	**:**	Zuku Cable Subscription Platform

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ABSTRACT

Liberalisation of airwaves and proliferation of broadcasting stations has led to increased competition in Kenyas' broadcast industry (Oriare et al., 2010). In the pay television sector, stiff competition was witnessed with the entry of Wananchi Group having a brand name Zuku in 2009 (Kenya Film Commission 2010).This study was focused on the pay television broadcast sector in Kenya with Zuku as a service provider. The overall objective of the study was to establish consumption patterns of local content on Zuku television by subscribers. Specific objectives included to establish factors determining uptake of local Zuku content, establish subscribers' perception of local content in terms of quality and story line, and establish responses of the service provider towards consumption patterns. The target population for this study was all Zuku subscribers in Nairobi.

 The study used primary data, which was collected using open-ended interviews and questionnaires and structured interviews with key informants. Secondary data sources were also consulted for more information. Data was presented by use of tables and figures. The study established that most Zuku subscribers were aware of all local programmes on its platform. It was further established that although local programmes awareness was high, consistency in viewership was poor. *State House* was established the most favourite local programme on Zuku platform because of its ability to connect with the viewership in terms of movie settings, fiction and drama, while *Groove Theory* was found to have the best video quality and *Leo* to have the best audio quality. Consistency of high viewership was found among subscribers of 25 to 30 years. Local programmes on Zuku were found to be family oriented hence people consumed them in a family setting. It was established that viewership of local programmes was concentrated on weekends more than weekdays among Zuku subscribers. The study recommended that Zuku needs to telecast fresh episodes of local programmes on weekends and slot repeats during weekdays. This study also recommended that Zuku needs to increase promotion of local content on its platform to increase awareness across all subscribers and come up with block and encounter programming strategies in order to retain and attract local content audience.

CHAPTER ONE

1.0 Overview

This chapter covers the introduction to the study, study area, background, problem statement, overall and specific study objectives, rationale of the study, study justification, scope of the study and study limitation.

1.1 Introduction to the Study

In Kenya, Digital Satellite Television (DSTV) which is a product of Multi Choice Africa has been the major player in the pay television market since 1995 (Kenya Film Commission 2010). However, the entry of Wananchi Group with a brand name of Zuku in 2009, led to a sharp rise in competition (Kenya Film Commission2010). Due to stiff competition in the market, Multi Choice Africa in 2011 launched another product called GOtv with an aim of making pay television more affordable to subscribers in Kenya (www.multichoice.co.za). *Star Times* which is owned by Chinese firm, *Star Times Media* with its signal being provided by Pan African Network Group was the latest entrant in the market having been launched in July 2012(www.startimes.co.ke). Due to this competition, pay television operators have started incorporating local content in their programming schedules in order to attract and retain their subscribers. According to Oriare et al., 2010, Kenyans want a media that promote development of local content and talent.

According to the Kenya Communications (Broadcasting) Regulations, 2009 local content means the total of all television or radio programmes which fulfil any four of the following conditions (a) The production is made in either Kenya's native languages or official language of Kenya. (b) The production was done in Kenya. (c) The content deals with issues that are unique and relevant to Kenyan audiences. (d) At least 20% of the share of the production company is owned by Kenyans. (e) Majority of the artists are Kenyans.

1.1.1 Classification of Broadcast Content

The Kenya Film Classification Board is mandated by Films and Stage Plays Act. Cap 222, Laws of Kenya to regulate the creation, broadcasting, possession, distribution

and exhibition of films in the Country. Section 46 I (2) of the Kenya Communications (Amendment) Act, 2009 further expands the mandate of the board to cover broadcasting sector. Kenya Film Classification board classifies broadcast content into the following categories, (i) GE (General Exhibition), which covers content suitable for family viewing (ii) PG (Parental Guidance), covers content contain scenes that may upset children under the age of 10 (iii) PG 16, for programmes that contain scenes unsuitable for persons under the age of 16 (iv) PG 18, for programmes that contain adult scenes only (v) Restricted/Banned are for programmes that erodes morals of society, undermine national interest or stability or create disharmony among various racial and religious groups.

1.2 Study Area

In Kenya, there is high trend of television viewership among the urban population than those in the rural (Kenya Film Commission 2010). The pay television market is still more concentrated in urban areas than in rural areas (Communications Commission of Kenya, 2012 currently known as Communications Authority of Kenya).The study was carried out in the pay television sector with specific focus on Zuku as a service provider. The study location was Nairobi since it forms part of urban areas with high subscriber concentration (Zuku, 2014). It also helped to ease the access of target population.

1.3 Background of the Study

The media industry has been identified as a key growth industry with great potential to spur economic growth and help in the realisation of Vision 2030 through tourist attraction, investment and employment creation (Oparanya, 2012). In the 1970s and early 1980s, Kenya was producing and hosting many international film crews as South Africa (Ministry of Information and Communication, 2011). In 2006, film production in Kenya generated about USD 45 million (estimate), whereas South Africas' City of Cape Town alone generated USD 540 million. Today, Kenya should conservatively have had an industry that is at least five times its current size if the growth curve had been maintained since the 1970s (Ministry of Information and Communication, 2011).

Content production has the potential to develop into a strategic industry for Kenya particularly in job creation, conservation, promotion and exportation of local culture and nurturing of local talents (Ministry of Information and Communication, 2007).

Kenyas' television audience can access diverse media choices but they are heavily fragmented. Audience habits, preferences and patterns affect media behaviour. Kenyas' media consumers use radio the most, followed by television and newspaper (Oriare et al., 2010).This means that it is the audience that controls the programming content of media houses and the broadcast media cannot dictate to the audience what they want to hear or watch. Therefore, if a subscriber chooses a pay television provider on the basis of particular sports content, those customers would be harder for competitors to tap as some sports content is sold on an exclusive basis (Communications Commission of Kenya, 2012, currently known as Communications Authority of Kenya). This underscores the fact that content is one of the major tools used by pay television stations to attract and retain their customers.

The information and technology revolution has positively affected the media in Kenya. Large media houses such as Nation Media Group, Standard Group, Wananchi Group and Multi Choice are quickly adapting to new technologies. Therefore, Kenyans want media that promote development of local content and talent (Oriare, et al., 2010).

The influence of television programmes on our political, socio-cultural and economic structures mostly depends on the level of exposure towards the broadcast content. With the rise of technological convergence, it is imperative to establish the platform where content is accessed for the desired influence to be achieved (Oriare et al., 2010).These platforms are radio, television, mobile phones and internet.

The movement of media in Kenya towards monopoly, leading to ownership concentration in few hands, has further led to homogeneity in terms of content production (Oriare et al., 2010).The duplication in terms of content production is mostly evident in free-to air stations (FTA) where you find programmes with same actors ,same themes and only the programme title has changed, airing in two different stations. For example, the programme *Pranksters* on NTV. On Citizen television the

programme called *Pasua* has the same theme as *Prankstars*, same location setting and one actor happens to appear in both shows. Another is the *XYZ* which is on the political satire in Kenya. The same programme was first aired on Citizen television but afterwards the programme moved to NTV. While there is an increase in duplication of local content by FTA stations, the stations have also to a larger extent promoted the local Kenyan television content. Some of the notable FTA stations that have extensively promoted Kenyan local productions are: (a) Citizen Television which has promoted many local productions namely; *Tahidi High*, *Mother –In-Law*, *Papa Shirandula, Inspector Mwala*, *Tabasamu, Machachari, Naswa* (*Naswa* is the most duplicated local content concept by Kenyan local content producers),*Nairobi Law, Waridi, Makutano Junction, Wedding Show* (also features among the most duplicated local production concept) *Tusker Project Fame*, *XYZ* show(www.citizentv.co.ke/schedule).(b) NTV promoted productions such as *Mali, Samantha Bridal*(Same production concept as *Wedding Show*),*Churchil Live, Churchil Raw, Noose of Gold, The Property Show, Guy Center, Beba Beba,Generation3,Prank Stars* (Shares same production concept as *Naswa* on Citizen) (www.ntv.nation.co.ke/schedule). (c) KTN local productions broadcasted are *Tujuane, Ajabu, Pasua* (Same production concept as *Naswa* and *Prank Stars*), *Afya Bora, Club Kiboko, Tazama, Kula Happy, Changing Times, Mheshimiwa, Art Scene, Lies that Bind, Kenya Kona, Mama Duka*(www.standard media.co.ke/ktnschedule). (d)KBC broadcasts local productions such as *Vitimbi, Vioja Mahakamani, Hila,* and *The Classmate* (www.publicbroadcasting.net/kbc/guide).

Zuku as a pay television has also incorporated Kenyan local television content such as, *Groove theory, State house* and *Leo*(www.zuku.co.ke/tvguide).The government of Kenya, over the past few years has tried to put in place mechanisms that can help promote local content productions such as the establishment of a Broadcasting Content Advisory Council (BCAC) which was established under section 46 of the Kenya Information and Communications Act,1998 (CAP 411A). The BCAC is responsible for making decisions on administration and development of broadcasting content aspects, compliance with broadcasting codes and ethics by broadcasters and mechanisms on handling broadcasting complaints. The council is to help further promote professionalism, integrity and ethics in the broadcasting sector. Secondly, the government has formulated The National Broadband Strategy which is to help to

promote online local content. This will in turn make local content productions more accessible via online platform thereby increasing viewership of local content. The popularity of digital content (e-content) is meant to increase because one of the objectives of the strategy is to provide quality broadband services to all citizens. Another milestone taken by the government is the formulation of a National Film Policy by Ministry of Information and Communication, 2011.The policy seeks to provide foundation to enable a complete and profitable turn around for the film industry and make an investment sector of choice.

Taking into account recent several efforts by government to put in legislations that will help promote Kenyan local content, this study therefore sought to establish consumption patterns of local content with specific focus on Zuku as a pay television provider.

1.4 Problem Statement

The local media content industry is an avenue that provides Kenyan artists to fully exploit their talent in acting, thereby creating job opportunities especially for the youth (Ministry of Information and Communication, 2011). Large media houses such as Nation Media Group, Standard Group, Wananchi Group, Royal Media Services and Multi Choice are quickly adapting to new technologies to create more platforms for local content. This move clearly demonstrates that Kenyans desire a media that promotes the development of local content (Oriare et al., 2010).

The Kenyan media is yet to fully embrace broadcast of local content. To ensure this is achieved, the Kenya government, through Parliament, legislated to increase local content to 60% from the current 40% in all local television stations (Hansard, 2013). While few researchers have in the recent past documented on local content (Oriare et al., 2010), such documentation has not focused on consumption patterns of local programmes on pay television in Kenya. In addition, since Zuku launched its pay television operations in 2009, the company has not undertaken any research in regard to its local programmes such as *Groove Theory, State House* and *Leo* so as to establish consumption patterns of Zuku subscribers towards local content, establish factors determining uptake of local content, establish subscribers' perception of local

content in terms of quality, storyline and to establish response of service provider towards consumption patterns. It is this research gap that the study sought to fill.

1.5 Overall Objective

The overall objective of the study was to establish consumption patterns of local content on Zuku television by subscribers.

1.5.1 Specific Objective

i) To establish factors determining uptake of local Zuku content.

ii) To establish subscribers' perceptions of local content aired by Zuku in terms of quality and story line.

iii) To establish responses of the service provider towards consumption patterns.

1.6 Research Questions

The study addressed the following research questions.

(i) What factors determine uptake of local content by Zuku?

(ii) What are subscribers' perception towards local content aired by Zuku in relation to quality and story lines?

(iii) What is the response of Zuku as a service provider towards consumption patterns?

1.7 Rationale of the Study

This study would help Zuku as a pay television operator to establish market response towards its local programmes such as *Groove Theory, State House* and *Leo*. It also sought to establish the consumption pattern of Zuku subscribers towards local content, subscribers' perception towards the content, factors determining the uptake of the programmes by Zuku and service provider responses towards consumption patterns. In addition, this study sought to establish if there is a need for Zuku to re-align its programming scheduling strategy.

1.8 Study Justification

Media users play an active role in choosing and using the media therefore, media users will always seek a source that best fulfils their needs (Blumer and Katz's,1974). The proliferation of media in Kenya has been characterised by the deployment of the

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latest technological innovations in the field of communication. Following this growth, Kenyans now prefer media that promotes the development of local content and talent (Oriare et al., 2010).

Groove Theory, State House and *Leo* programmes form part of the major local content that has been promoted by Zuku. However, how subscribers interact with these programmes is yet to be established. Also, pay television is a service delivery industry where the players must always ensure that the needs of subscribers are always met. This study, therefore, sought to find if the adopted local content continues to positively impact on Zuku subscribers. It also sought to establish if local content scheduling strategy impacts well on the subscribers or not. It is for these needs that this study was undertaken.

1.9 Scope of the Study

According to Abel (2008), population is the entire group of individuals, objects, items, cases, articles or things with common attributes or characteristics. This study covered Zuku pay television subscribers within Nairobi because of easy access and budget constraints.

Narrative as a qualitative research method was used. According to Jwan et al., (2011,) Narrative research thus, allows the researcher to share the storied lives of participants to provide insights and understandings about challenging social issues as well as to enrich lives of those participants. Subscribers gave their stories on their perception towards Zuku local content programmes namely, *Groove Theory*, *State House* and *Leo*. In-depth face to face interviews were carried out with key informants such as Zuku programming manager and marketing representatives.

1.10 Study Limitations

While conducting this study, challenges were experienced during data collection where nine respondents failed to return their questionnaire and to participate in the open ended interview due to attitude towards this study. The study however worked at winning confidence of those involved in this research and assuring them of confidentiality. Also, Zuku subscribers who pay for their monthly subscription via mobile money (M-pesa, Airtel Money), online payment through pesapal

(www.pesapal.com), paying via Pesa Point Automatic Teller Machine and payment through the banks were left out as the study targeted only those who came to make their cash payment at the head office located along Mombasa Road, Nairobi. This was because of ease of access and budget constraints. In addition, study respondents were only available towards end of the month which slowed the pace of data collection. Moreover, the study was a case study of Zuku as a pay television operator. This selection was limited to the extent at which the findings of this study can be generalised to cover the entire pay television industry. Also, the period of this study was six months which is too short to exhaust in detail the purpose of the study.

CHAPTER TWO

LITERATURE REVIEW AND THEORETICAL FRAMEWORK

2.0 Introduction

There is a renewed interest in the power of the mass media over its audience. As media technology develops and as mass media become more pervasive in our daily lives, media influence is no longer limited to changing or reinforcing opinions, attitudes and behaviours; Kevin,(2003).The mass media has become important socialisation agent as well creating and shaping many of our shared attitudes, values and perceptions of social reality; Alexis, (1984).In the wake of this new reality, the government of Kenya has shown unprecedented interest in increasing the percentage of Kenyan local productions to broadcast in media stations from 40 per cent to 60 per cent. (Hansard, 2013).Technological advancement in communication industry is yet to support broadcasting of more local content especially the long awaited shift from analogue to digital broadcast platform (Ministry of Information Communication, 2007). Also, the faster growth being seen in the pay television industry is yet to fully promote locally produced programs. This chapter, therefore, critically examine theories and studies that are relevant to this research.

According to Abel, (2008), the first purpose of literature review is to help the researcher conceptualise a research study by acquiring a broad based knowledge of possible topics. Secondly, it helps one to compose a critique of the materials that have been identified by the researcher as relevant.

2.1 Critique of Related Media Research

Oriare et al., 2010, in their research "The Media We Want" concentrated more towards media ownership trend and consolidation in Kenya. In this section, Oriare et, al., (2010), associates media political ownership with political elite class such as former President Daniel Arap Moi, his son Gideon Moi and Joshua Kulei having a link with the Standard Group, former Prime Minister Raila Odinga being associated with Radio Umoja and Nam Lolwe FM, while former Presidential Candidate Kenneth Matiba being associated with *The People* newspaper through Kalamka Limited.

Oriare et al.,(2010) notes that the popularity of local television programs like *Mother In-Law*, *Tausi*, *Papa Shirandula* and Cobra Squad indicate that Kenyans want media that would promote development of local content and talent. However, Oriare et al., (2010), doesn't indicate the uptake of these programs by pay television sector.

Oriare et al., (2010), suggests that there is only a need to undertake further research on applications and financial viability of emerging local content while there also exists the need to determine the uptake of local content more so by pay television, reasons for the uptake and its influence on subscribers'. It is this gap that this research sought to fill.

2.2 Theories

Kevin,(2003) notes that the purpose of theory is to explain, comprehend and interpret phenomena and put forward propositions suggesting why such phenomena occur in the manner they do.

2.2.1 Uses and Gratification Theory

This theory explains the relationship between audience and media. It focuses on the reasons why people use media, hence studies the use of media as part of everyday social interaction (McQuail, 2010). For instance, most people would want to watch Kenya Premier League especially the match between Gor Mahia and AFC Leopards simply because of the popularity of the club and the social interest which the two clubs elicit in the sports arena, hence any discussion of the two teams creates a high level of social interaction, Morley, (1992). The theory further presents the use of media in terms of satisfaction of social or psychological needs of an individual (Blumler & Katz 1974).Mass media compete with other sources of gratification, though gratification can be attained from a medium's content. Examples include watching a specific programme such *Tahidi High*, *Vioja Mahakamani*. The theory further posits that gratification can be attained from familiarity with a genre within a medium. For example, a person will watch a comedy like *Churchil Live* because he/she can easily relate with the programmes' content. It can also be due to the general exposure to the medium and from the social context in which the media is used such as watching television program together with family.

Uses and Gratification theory focuses attention on individuals in the mass communication process while sometimes gratification happens at group level. People use media for reinforcement of values .They always want to identify with characters that reinforce their values.

McQuail (2005) notes that people use media for different reasons but perhaps the most important one is the quest for current information in the society. For instance, people are always glued to their television sets during news time to catch up with the current happenings in the society hence become informed.

Blumler and Katz, (1974) argued that audience needs have social and psychological origins which generate certain expectations about the mass media leading to different media exposure patterns of gratifying both intended and unintended needs. This therefore assumes an active audience making own choices. However, McQuial, (1987) argues that social and psychological status uniformly influence both general habits of media use and belief and expectations of benefits offered by media which shape specific acts of media choice and consumption.

Uses and gratification theory states that media audience is always active, therefore give different interpretations to media messages for self-satisfaction. The theory posits that people actively use media for personal identity, integration and social interaction. Blumler and Katz, (1974) say that people's social and psychological origins do generate expectations and needs that are always gratified by media.

2.2.1.1 Relevance of Theory to the Study

Relevance of this theory is demonstrated in the increase of interest towards Kenyan local content by television audience (Oriare et al., 2010). Pay television companies such as Multi choice and Wananchi Group have started to commission many local programmes. This shows that Kenyan television audience interest and satisfaction on use of media as a form of entertainment is geared towards local content. This shift has made viewer demand to be the key driver for creation of local content. This study therefore, focused on the gap towards consumption trend of created local content.

2.2.2 New Audience and Reception theory (Active Audience)

This theory focuses on how audience members generate meaning from the media in broader context of the exercise of power in society (Kevin, 2003).The uses and gratification model is interested in what audiences do with the media. However, this theory is more interested in understanding how audience actively engage in the process of generating meaning and the factors outside the media that shape the sense they make of the media messages (Kevin, 2003).The theory also recognises the intelligence of media audience and their capacity to make decision on the type of content they want to watch thereby putting them in an active individual, social and political level.

Structuralists argue that the content of the media is organised in particular patterns that positions audience and determine meaning people take.(Kevin,2003).Writers of the screen theory such as Stephen II Catch and Laura Mulvey analysed how films position the audience as a subject and force them to take on the identity and ideology of the film text. Heath, (1981) argues that audience is positioned in the narrative of a film by Cinematic techniques. For example, the camera shoots from perspective of protagonist and what she /he is looking at, thereby offering the audience with an illusion of the world. This encourages the viewer to be active and see camera as real and not an ideological construction.

It examines structure of the film through the use of the camera angles, editing devices and other techniques (Mulvey, 1975).According to Eldridge et al.1997, film tends to construct masculine subject positions. In mainstream Hollywood, women act as erotic objects for male audience (Van, et al.2010). Mulvey says that the link between Cinematic practices and patriarchy is clear. Films reflect, reveal and even play on straight, socially established interpretations of sexual difference. This perhaps explains the reason why there are specific roles for male and female actors in local television content. For example, Men will always play the role of watchman in local drama '*Papa Shirandula*'.

Criticism: This theory fails to explore the relationship between actual audience and content, while the uses and gratification theory clearly explains this relationship in terms of personal identity. It says the relationship is created when the audience use

content as a tool of integration and social interaction and for quest of getting information. Screen theory fails to acknowledge that audience members come to media with their own views and perspectives but instead states that it is the media text that constructs one's ideological position. Mulvey's work has also been challenged for neglecting difference in sexual identity amongst audience and for emphasising gender at the expense of other differences such as race (Eldridge et al., 1997).

In re-appraising active audience theory; it states that audience are no longer passive, gullible entity and easily manipulated by media. It moved away from seeing people's interaction with media as passive. Active audience theory challenges the notion that what the media say is crucial in determining what people think. People are not simply captive subjects positioned by media texts to accept ideological dominant messages, they have the freedom and interpretive skills to resist and subvert the media. (Kevin, 2003).

Fiske's as one of the active audience theory scholars is stressing on ability of audiences to make their own meanings from what the media produces. Schiller, (1989) observes that in active audience theory, the impact of resistance and subversion. The active audience theory says that resisting media messages is always progressive, other critiques like Barker and Brooks, (1998) point out that audience in some situations could be said to be positively choosing to be passive.

Kitzinger, (1999) identify difference between how people react or respond to media text and interpretation of the meaning of text in that others can agree on the meaning but refuse to accept what is conveyed while some people use the media as a source of personal identity. Others may, however, reject this notion. For example, some audience will find Kenyan local television content appealing while others will not. Kitzinger (1999) therefore disagrees with Blumler and Katz (1997) theory that media use tend to be more specific among audience.

Morley, (1986) says that decision to watch particular program or format was not simply based on pleasure people gained from them or their resonance with the ideological approach. Instead, they were as a result of family circumstances and power relations in homes. The different roles men and women have in domestic

sphere shape their viewing habits. For example, women will watch some programs because their husbands watch and the same applies to men. This is based on who has the power over the remote.

2.2.2.1 Relevance of Theory to the Study

Relevance of this theory to the study is seen on how individuals actively engage with media messages and the meanings they attribute to them. This active engagement is demonstrated by how Kenyans copy some dialects used in Nigerian movies. Locally, Kenyans are actively engaging in local sports. Currently local football has become a major form of entertainment and attracts more fans. Characters in local programs like *Papa Shirandula* draw a lot of attention from Kenyan audience such that even advertisers use them to do their adverts because of interest they elicit from local content fans. This study therefore, focused on the gap towards the unprecedented interest for local content by Kenyan television audience.

CHAPTER THREE

RESEARCH METHODOLOGY

3.0 Overview

In this chapter, we discuss methodology that includes: study philosophical paradigm, research approach, research methods, study population, the target audience, sampling frame, data collection tools, pilot study and data analysis. In addition, it entails ethical considerations of the research and reflexivity.

3.1 Philosophical Paradigm

According to Abel, (2008), paradigms are axiomatic systems characterised by differing sets of assumptions about the phenomena into which they are designed to inquire. All researchers have a philosophical learning (Jwan et al., 2011).

Two main issues were considered when it comes to philosophical paradigm. These are: ontology and epistemology. In other words, the nature of reality and the way reality is studied. Under ontology, what shapes my view is relativists' position. This takes a subjective view that there is no single viewpoint of the world and therefore reality is internal to and dependent on the individual's perceptions and experiences (Johnson, 2008). This means that when taking different subscribers' view on their perception towards local content on Zuku, each subscriber gave his/her own view regarding local content. These views are shaped by the environment where one is watching Zuku local programmes from, the cultural setting hence objective multiple interpretations are expected. Therefore, my philosophical view on this is that different individual perceptions i got concerning local content were due to mixed social and cultural settings subscribers were exposed to.

Mason (2002), explains that interpretivist-constructive epistemology seeks to generate data from people themselves: aiming to get knowledge about how people perceive, interpret and understand issues that affect them in their contexts. The interpretive approach not only allowed me to see people as primary source of data but also helped to seek their perceptions. In epistemology, my philosophical learning is that the outcome of peoples' view on local content was as a result of their 'insider view' and not the 'outsider view'. Jwan et al, (2011) states that though persons may interpret

practices and activities in different ways, they are likely at the same time to be influenced by views of the peers, family and ethic group they belong.

3.2 Research Approach

According to Gall, Borg and Gall (2003), research can be classified based on the type of data collected or method of data collection used. There are two types of research approaches namely quantitative and qualitative approach (Mugenda, 2008).Qualitative approach was used based on the type of data and method of data collection that were employed, this included interviewing of the participants and reviewing of past records.

3.3 Research Method

Jwan et al, (2011) say that narrative researchers collect data about the participants' experiences and the meanings they attribute to those experiences. They further define narrative research approach as the study of how different human experience the world around them and involve a methodology that allow people to tell stories of their lives. Narrative was used as one of the qualitative approach because it necessitates a relationship between the researcher and the participant. Clandinin et al, (2000) suggest that it is important that the relationship between the researcher and participant be mutually constructed in a manner that is caring, respectful and characterised by an equality of voice.

3.4Target Population

A population is the group that research focuses on (Cooper and Schindler, 2003).Target population in statistics is the specific population from which information is desired. The study targeted Zuku subscribers in Nairobi. This was because of easy access and budget constraints. There are 50,000 Zuku subscribers on Cable platform in Nairobi and 70,000 Zuku subscribers on Satellite platform in Nairobi (Zuku, 2014).This means that the targeted population in this research was 120,000.This was also the accessible population for the purpose of the study.

3.5 Sampling Technique and Sample Size

Convenient or accidental sampling was used. Abel, (2008) refers to this as availability sampling. Convenient sampling eased accessibility of the target population since any

subscriber who came to pay his/her monthly subscription fee formed part of the study sample despite race, gender, age, educational background and economic status. This led to collection of varied opinions from respondents.

One challenge faced by using convenient sampling is that, i was not able to get views of subscribers' who pay for their monthly subscription through M-Pesa, Pesapal, Airtel Money and Yu Cash. A sample of fifty (50) Zuku subscribers in Nairobi was obtained. This was because of easy access and budget constraints. The sampling took a period of 10 days whereby each day five (5) subscribers who had come to pay for their monthly subscription were interviewed.

Table 3.1: Sample Size

Zuku Subscribers in Nairobi		
Platforms	**No.of Subscribers**	**Obtained Sample**
Satellite	70,000	20
Cable	50,000	30
Total	**120,000**	**50**

Source: Researcher, 2014

3.6 Sampling Frame

Selecting a sampling frame was done selectively and purposively. Schatzman and Staruss (1973) stated that selective sampling is a practical necessity that is 'shaped by the time the researcher has available to him, by his framework, by his starting and developing interest and by any restrictions placed upon his observations by his hosts' Additionally, in their discussion of sampling people, they stated that the researcher select people according to the aims of research.

According to Patton (1990), the 'logic and power of purposeful sampling lies in selecting information rich cases for study in depth. Information rich cases are those from which one can learn issues of importance to the purpose of the research.
Table 3.2 indicates summery of the sampling frame used.

Table 3.2 Sampling Frame

CUSTOMER ID	AREA OF RESIDENCE	SUBSCRIPTION PLATFORM
ZSPLOO201201	SOUTH C	SATELITE

ZSPL00201202	SOUTH C	SATELITE
ZSPL00201203	SOUTH B	SATELITE
ZSPL00201204	SOUTH B	SATELITE
ZSPL00201205	HIGHRISE	SATELITE
ZSPL00201206	HIGHRISE	SATELITE
ZSPL00201207	HIGHRISE	SATELITE
ZSPL00201208	HIGHRISE	SATELITE
ZSPL00201209	HIGHRISE	SATELITE
ZSPL00201210	SOUTH C	SATELITE
ZSPL00201211	SOUTH C	SATELITE
ZSPL00201212	SOUTH C	SATELITE
ZSPL00201213	SOUTH C	SATELITE
ZSPL00201214	SOUTH C	SATELITE
ZSPL00201214	SOUTH C	SATELITE
ZSPL00201215	SOUTH C	SATELITE
ZSPL00201216	SOUTH B	SATELITE
ZSPL00201217	SOUTH B	SATELITE
ZSPL00201218	SOUTH B	SATELITE
ZSPL00201219	SOUTH B	SATELITE
ZSPL00201220	SOUTH B	SATELITE
ZSPL00201221	IMARA DAIMA	SATELITE
ZSPL00201222	IMARA DAIMA	SATELITE
ZSPL00201223	IMARA DAIMA	SATELITE
ZSPL00201224	IMARA DAIMA	SATELITE
ZSPL00201225	IMARA DAIMA	SATELITE
ZSPL00201226	IMARA DAIMA	SATELITE
ZSPL00201227	UMOJA	SATELITE
ZSPL00201228	UMOJA	SATELITE
ZSPL00201229	UMOJA	SATELITE
ZSPL00201330	UMOJA	SATELITE
ZSPL00201331	UMOJA	SATELITE
ZSPL00201332	UMOJA	SATELITE
ZSPL00201338	UMOJA	SATELITE
ZCPL00201339	SOUTH B	CABLE
ZCPL00201340	SOUTH B	CABLE
ZCPL00201341	SOUTH B	CABLE
ZCPL002013342	SOUTH B	CABLE
ZCPL00201344	SOUTH B	CABLE
ZCPL00201345	SOUTH B	CABLE
ZCPL002013346	SOUTH B	CABLE
ZCPL00201347	SOUTH B	CABLE
ZCPL00201348	SOUTH B	CABLE

ZCPL00201349	SOUTH B	CABLE
ZCPL00201350	SOUTH C	CABLE
ZCPL00201351	SOUTH C	CABLE
ZCPL00201253	SOUTH C	CABLE
ZCPL00201354	SOUTH C	CABLE
ZCPL00201355	SOUTH C	CABLE
ZCPL00201356	SOUTH C	CABLE
ZCPL00201357	SOUTH C	CABLE
ZCPL00201360	SOUTH C	CABLE
ZCPL00201366	SOUTH C	CABLE
ZCPL00201370	SOUTH C	CABLE
ZCPL00201372	SOUTH C	CABLE
ZCPL00201379	SOUTH C	CABLE
ZCPL00201380	SOUTH C	CABLE
ZCPL00201381	SOUTH B	CABLE
ZCPL00201382	SOUTH B	CABLE
ZCPL00201383	SOUTH B	CABLE
ZCPL00201384	SOUTH B	CABLE
ZCPL00201385	SOUTH B	CABLE
ZCPL00201386	SOUTH B	CABLE
ZCPL00201387	SOUTH B	CABLE
ZCPL00201388	SOUTH B	CABLE
ZCPL00201389	SOUTH B	CABLE
ZCPL00201390	SOUTH B	CABLE
ZCPL00201391	IMARA DAIMA	CABLE
ZCPL00201392	IMARA DAIMA	CABLE
ZCPL00201393	IMARA DAIMA	CABLE
ZCPL00201394	IMARA DAIMA	CABLE
ZSPL00201395	IMARA DAIMA	SATELITE
ZSPL00201396	HIGHRISE	SATELITE
ZSPL00201397	HIGHRISE	SATELITE
ZSPL00201398	HIGHRISE	SATELITE
ZSPL00201399	HIGHRISE	SATELITE
ZSPL00201400	UMOJA	SATELITE
ZSPL00201401	UMOJA	SATELITE
ZSPL00201402	UMOJA	SATELITE
ZSPL00201403	UMOJA	SATELITE

Source: Zuku Win cable, 2014

3.7 Data Collection Tools and Techniques

The purpose of a tool or instrument is to measure the variables of the study (Abel, 2008).The tools that were used include: Open-ended interviews to get views of Zuku

subscribers on local content i.e. *Groove Theory*, *Leo* and *State House*. An audio recorder was used so as to capture all the verbal explanations. Structured interviews with Key informants such as Zuku head of programming and marketing representative was done. Use of open ended interview allowed me to ask follow up questions that helped to extract more information from subscribers.

According to Holstein and Gubrium, 1997, open ended interviews allow respondents to play an active part in the research, rather than being passive objects to be studied. Structured interviews helped to go about questions that required no or yes answers from Key informants. Strength of interviews as a data collection tool is that they are more focused and insightful. The weakness is that it can be biased due to poorly constructed questions and can have inaccuracies due to poor recall.

Stake (1995) observes that "gathering data by studying documents follows the same line of thinking as observing or interviewing". Data from earlier commissioned researches by Zuku were studied and acted as secondary sources. One strength of secondary data sources is that they are stable and can be reviewed repeatedly; they have exact meaning, contain exact names, references and details of an event and offer abroad coverage. The weakness of secondary data sources is that it can result in biased selectivity if the collection is not complete. Also, their access may be deliberately blocked.

Researchers can best counter criticism of data collection techniques used in narrative research by ensuring the use of multiple data sources (Jwan et al, 2011). Questionnaires were given to subscribers which were later used as multiple data sources.

3.8 Pilot Study

Before the research tools were finally administered to participants, pre-testing was carried out to ensure that the questions were relevant, clearly understandable and make sense. The pre-testing aimed at determining the reliability of research tools including wording, structure and sequence of questions. The pre-testing involved 5 respondents that were selected randomly among Zuku pay television subscribers. The purpose of pilot test was to refine the questions so that respondents in major study

would have no problem in answering the questions. Experts were requested to comment on the representativeness and suitability of questions and give suggestions of corrections to be made to the structure of research tools. This helped to improve the content validity of data of data that was collected.

3.9 Data Analysis and Presentation

According to Richards (2009and Yin, 2003, 2009), data analysis in qualitative research involves looking at the data, assigning categories and putting together emerging issues into themes in an attempt to answer research questions.

Thematic analysis as was used: According to Aronson (1994), using thematic analysis is done by first reading and listing the categories of experiences from the transcribed data and field notes then identifying all the data that illustrate the categories. My analysis took an inductive approach where themes emerged from data. In the data analysis, the following stages were followed: transcribing data, re-familiarising with the data, first phase coding, second phase coding, third phase coding and product report. Data was presented inform of narratives, table and figures.

3.10. Dependability and Credibility

Credibility is extent to which a research fact or finding is what it is claimed to be (Bassey, 1999). To ensure credibility, key concepts were reviewed; here clear operational definitions which have been identified were used consistently throughout the study. Exercising triangulation; same research questions were answered from different perspectives so as to uncover all aspects of the study. Also, different sources of data were used (source triangulation), this involved getting data from different participants. Providing a chain of evidence; Open ended interviews were done with subscribers on an interval of 5 interviews per day; filling of questionnaires also followed after the interview. Member checking; Draft of the research report was given to key informants such as Zuku head of programming, marketing representative so as to confirm if they have been reported correctly. Dependability is demonstrating that the operations of a study –such as the data collection procedures-can be repeated, with the same results (Yin,2003).This was ensured by making a thick description of the entire research process. A proper interpretation on open ended interviews was done.

3.11. Ethical Considerations

Ethics are the moral principles that guide research from its inception through to its completion and publication of results (Economic and Social Research Council, 2005). Specific ethical considerations that were adhered to are (Jwan et al, .2011);

(a) Participant-not subjects: I referred to my data sources as participants and not subjects so as to recognise their active role in the research process.

(b) Informed consent: All research participants were given accurate and detailed information about the research and their express consent be assured before starting the research process. Participants were informed of the general nature of the research so that they can make informed decision about whether or not to participate in the research. Also before starting audio recording I reminded participants that the discussion would be audio-recorded and they are free to participate or not.

(c) Confidentiality and anonymity: There was no disclosure of any individual who will participate in the research process. Also, on the site where the research was carried out. On confidentiality, the information given by participants was not passed to anyone. However, informed them that this may be published in a journal article or book.

(d) Privacy: Participants had a right not to take part in the research, not to answer questions and not to be interviewed if they feel so.

(e) Protection from harm: Any physical or psychological harm, discomfort or stress to the participants was avoided. These include revealing information that relates to their illegal, sexual or deviant behaviour. Their position in occupational settings.

Also, information was given to participants on who they should contact in the event of any issues arising in the course of the research which I may not be able to solve. Therefore, University of Nairobi contacts were given in case of an issue.

(f) Deception: Purpose of the study was not concealed; hence I truthfully told participants the nature of the study.

(g) Falsified data; False data was not presented in this research because I am aware that it can compromise my research professional status, reduce public trust in the research and jeopardise future study in the area of local content on pay television.

(h) Faking results: No fake result has been presented in this research.

(i) Plagiarism: Ideas, results or written materials from other sources have not been presented as my own in this research. This included material downloaded from website. Any source was adequately mentioned.

(j) Payment: No inducement to participants was offered prior to seeking consent either in the form of payment or gift.

3.12. Reflexivity

Reflexivity refers to the awareness of the researcher's contribution to the construction of meanings throughout the research process and an acknowledgement of the impossibility of remaining outside of one's subject matter while conducting research (Jwan et al, 2011).

I am an employee of Zuku in the broadcast department. This enabled me to approach this research from an objective angle because of an interest of knowing Zuku subscribers' perceptions towards local content on Zuku television. My experience in broadcast content production helped me to give a positive critique on the production aspects of local content on Zuku television.

CHAPTER FOUR

DATA ANALYSIS AND INTERPRETATION

4.0 Overview

This chapter focuses on data analysis, results presentation and discussion of the findings. The overall objective of this study was to establish consumption patterns towards local content on Zuku television by subscribers. This study also sought to establish factors determining uptake of local content by the service provider, establish subscribers' perception towards local content aired by Zuku in terms of quality and story line and establish responses of the service provider towards consumption patterns. The research findings were presented inform of narratives, table and figures.

4.1 Response Rate

The sample size of this study was fifty respondents out of which 41 filled and returned their questionnaires. The same number also participated in open ended interview. Out of 41 respondents 38 were subscribers and three were key informants. The remaining nine respondents neither returned their questionnaires nor accepted to be interviewed. This represented a response rate of 91 per cent. This correlates with Mugenda and Mugenda`s (2003) recommendation that a response rate of 50% is adequate for analysis and reporting; a rate of 60% is a good and a response rate of 70% and over is excellent. This clearly shows that the response rate in this study was excellent.
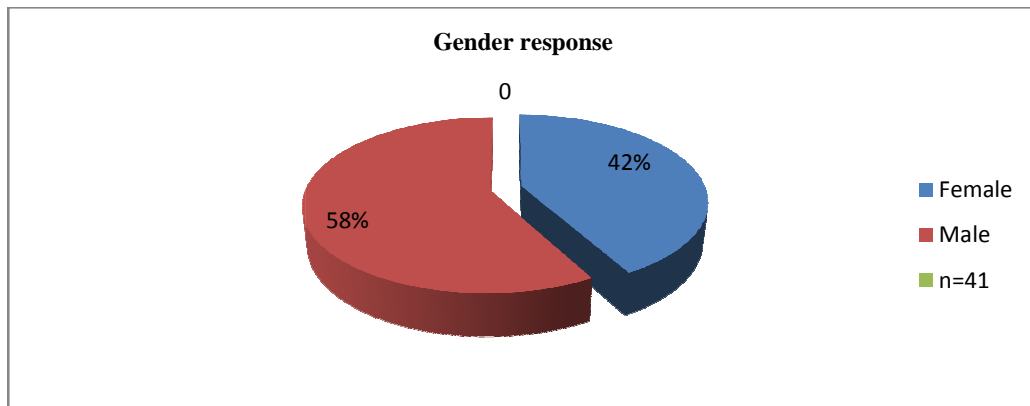
4.2 General Information

The general information of the respondents comprised gender, age bracket, highest level of education and subscription platform.

4.2.1 Gender of the Respondents

The respondents were asked to indicate their gender. The results are presented in figure 4.1.

Figure 4.1: Gender Response

Source: Researcher, 2014

According to the findings, 58% of the respondents indicated that they were male while 42% were female. This showed that majority of male subscribers opt to pay for their monthly subscription through cash leaving other payment methods such as paying via mobile money (M-pesa, Airtel Money), paying online through pesapal (www.pesapal.com), paying via Pesa Point ATM and paying through banks. It was also established that those who work near Zuku head office opt to pay for their monthly subscription through cash majority of which were men.

4.2.2 Age Bracket of the Respondents

The respondents were also requested to indicate their age bracket. The results are shown in figure 4.2.

**Figure 4.2: Age Bracket of the Respondents**
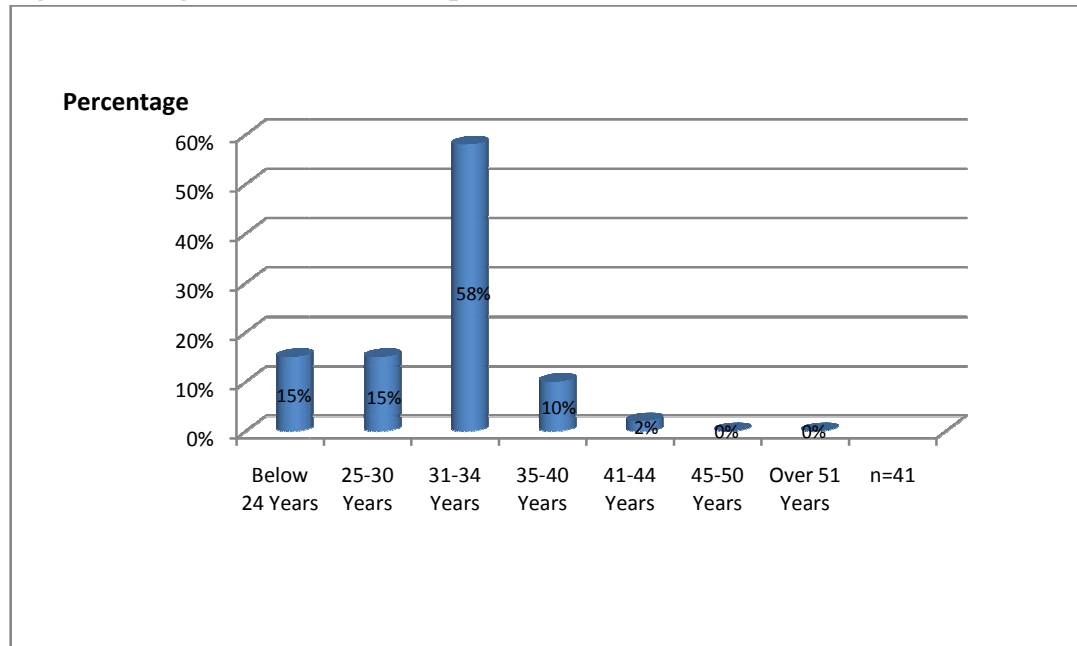
Source: Researcher, 2014

The respondents were distributed across all age groups starting from below 24 years to 51 years and above. According to the findings, 15% of respondents were below 24 years, 15% of the respondents indicated that they were aged between 25 and 30 years. Fifty eight per cent indicated that they were aged between 31 and 34 years while 20% indicated that they were aged between 35 and 40 years and 2% indicated that they were aged between 41 and 44 years. Respondents between the age of 45 and 50 years reported an outcome of 0%, the same to those between 51 years and above hence didn't form part of the study. From the findings, the study deduced that most of the respondents were between 31 and 34 years. This also indicates that people between the age of 31 and 34 years afford and uses pay television services.

4.2.3 Respondents Highest Level of Education

The respondents were requested to state their highest level of education. The results are presented in figure 4.3.

Figure: 4.3: Highest Education Level
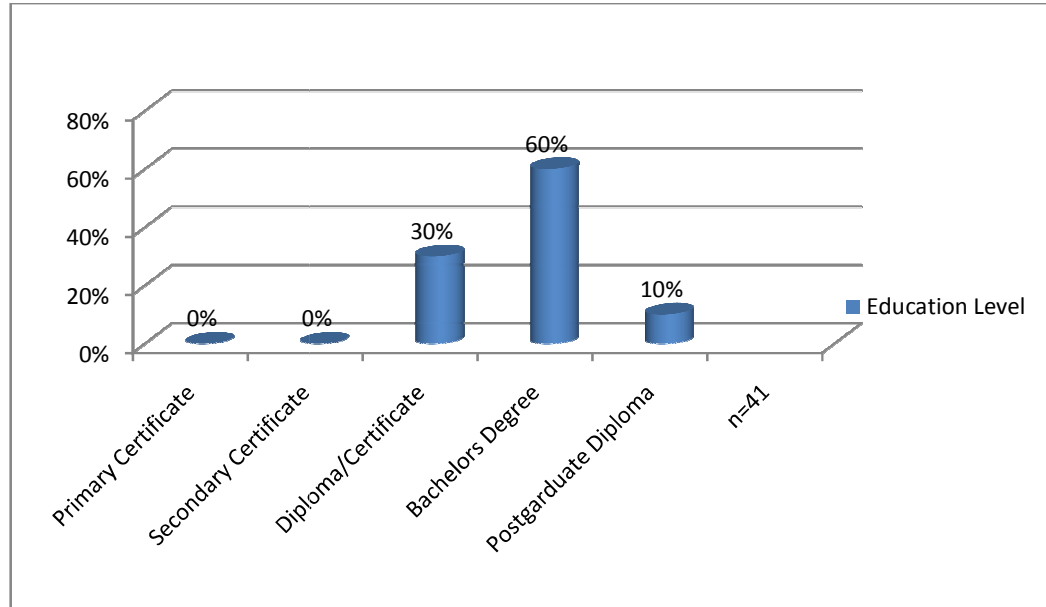
Source: Researcher, 2014

According to the findings, 30% of the respondents indicated that they had college diploma/certificate as their highest level of education, 60% had bachelors' degree, 10% indicated they had postgraduate degree while no respondent indicated to have primary or secondary certificate as their highest level of education hence, a 0% was recorded. From these findings, I deduced that most of the respondents in this study had bachelors' degree as their highest level of education. This clearly shows that pay television subscribers have appreciable level of education hence can give a logical perception towards local content aired by Zuku in terms of quality and story line.

4.2.4 Subscription Platform

The respondents were requested to state their subscription platform. The results are presented in figure 4.4.

Figure 4.4 Subscription Platform
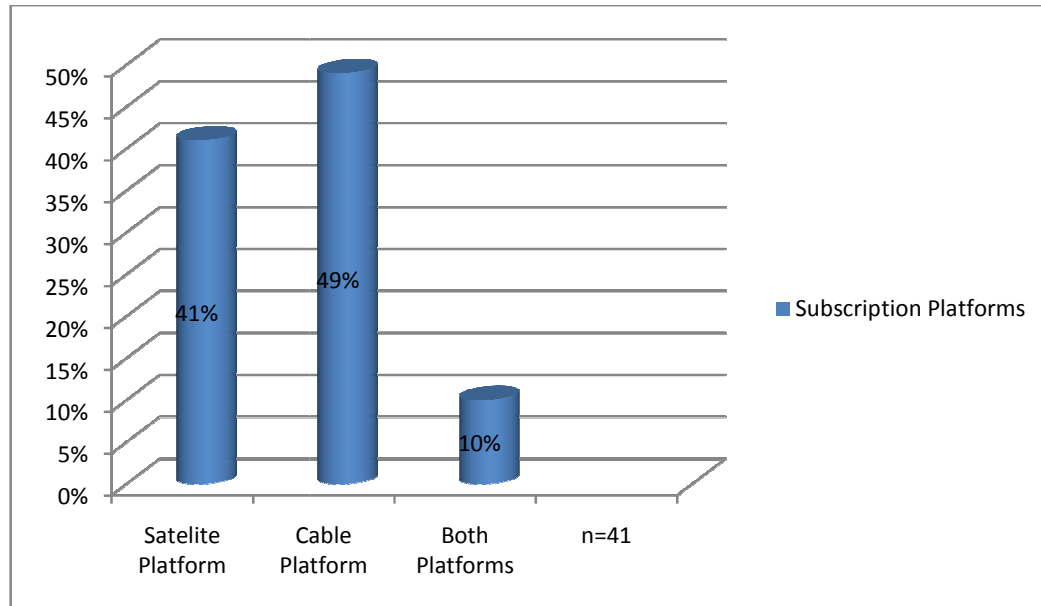
Resource: Researcher, 2014

According to the findings, 41% of the respondents indicated that they were on satellite platform, 49% were on cable platform and 10% were both on cable and satellite platform. From the findings, most of the respondents were on cable platform, which further indicates faster spread of Zuku fibre coverage within Nairobi.

4.4 Programmes Consumption Pattern

This study sought to establish consumption patterns of local programmes on Zuku pay television. Several factors towards consumption patterns of local programmes were interrogated such as awareness of local programmes, favourite programme, programme viewership frequency/consistency, setting/environment/location of watching such programme, preferred telecast time of the programmes, video and audio quality of the programmes, and relation of programmes story line to local context/environment.

4.4.1 Awareness of Local Programmes on Zuku

The respondents were asked to indicate whether they were aware of local programmes on Zuku television namely *State House*, *Leo* and *Groove Theory.*

Figure 4.5: Programme Awareness
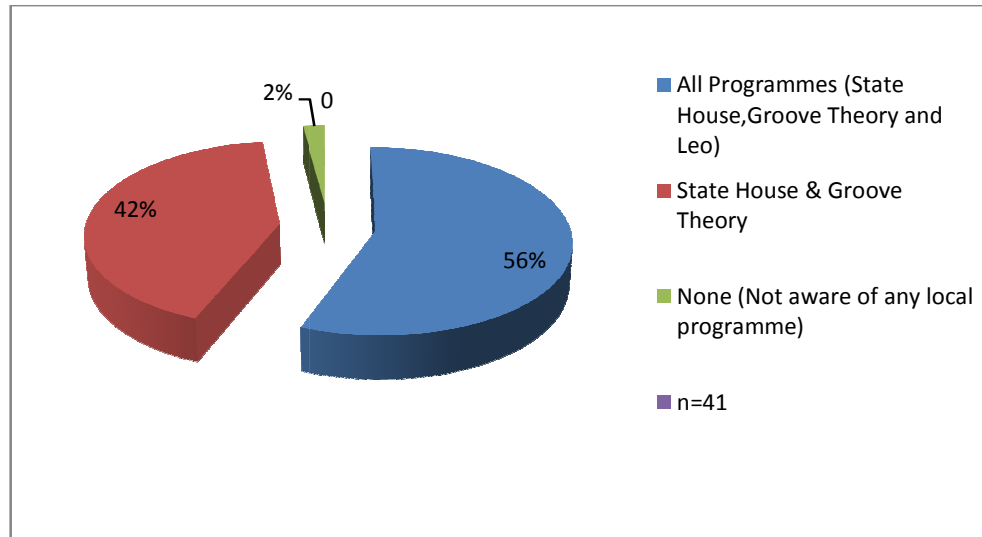
Source: Researcher, 2014

As indicated in figure 4.5 above, 56% of the respondents reported that they were aware of local programmes on Zuku television (*State House, Groove Theory and Leo*). Forty two per cent of the respondents indicated that they were aware of only two programmes namely *State House* and *Groove Theory* while 2% of the respondents indicated that they were not aware of any of the mentioned local programmes on Zuku and instead indicated that they were aware of *Crime Lab* and *Nat Geo Gold* which are international content. Subscribers who indicated awareness of all programmes were mostly between 24 years and below, 25 and 30 years, 31 and 34 years. Respondents who indicated awareness of only two programmes (*State House and Groove Theory*) were mostly between the age of 35 and 40 years. Subscribers between 41 and 44 years indicated awareness of international content and not local content. The study did not manage to capture views of subscribers between the age of 45 and 50 years, 51 years and above respectively. This is because a good number of customers within the ages did not come to pay for their monthly subscription at Zuku head office hence; they might have paid through other channels or sent others to make payments on their behalf. From the findings, most subscribers were aware of local content on Zuku channel hence, it is expected that more customers should be watching local

programmes on a regular basis however, most respondents when asked whether they had watched any of the programmes in 7 or 4 weeks, most people responded to have watched local programmes in the last four weeks and not 7 days as it would be, based on awareness level. From the findings i found out that although there was high level of awareness of the local programmes, viewership of the programmes was not consistent among the subscribers. The study also found out that some subscribers (42%) were not able to recall *Leo* among the local content. In addition, there were some subscribers (2%) who were totally not aware of any locally content on Zuku. The studies therefore deduce that Zuku needs to intensify awareness of local content on its platform through various channels of communication.

4.4.2 Favourite Programme

The respondents were asked to indicate their favourite programmes. The results are shown in figure 4.6.

Figure 4.6: Favourite programme
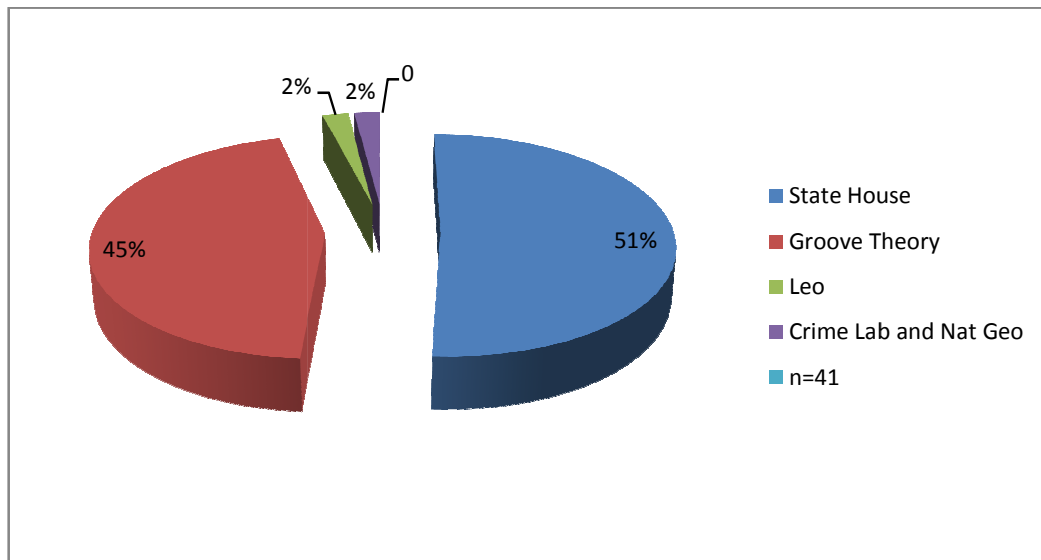
Source: Researcher, 2014

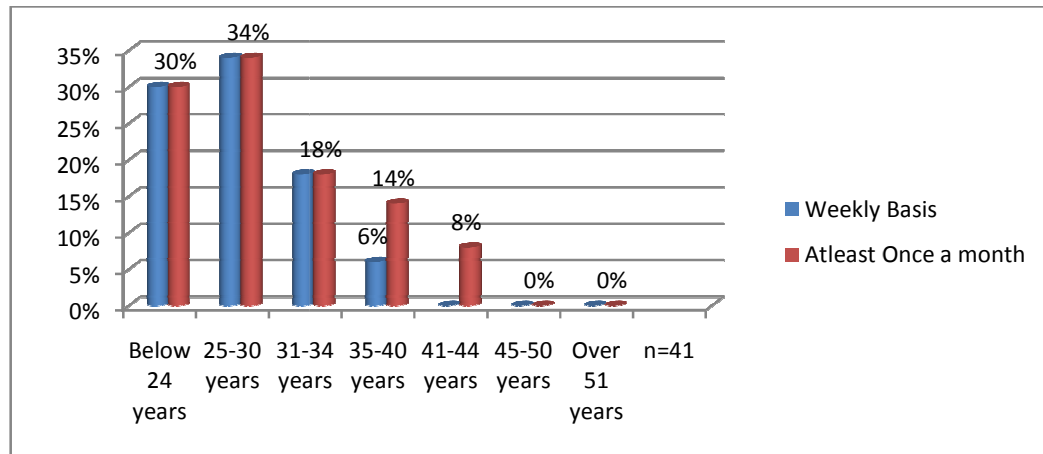According to the findings, 51% of the respondents indicated *State House* as their favourite programme, 45% mentioned *Groove Theory*, 2% indicated *Leo* as the favourite programme while 2% mentioned *Crime Lab* and *Nat Geo* as their favourite programmes. From these findings the study, most of the respondents indicated *State House* as their favourite programme hence the most watched local content on Zuku

platform, this is because of unique concept (the first show to highlight what goes inside the most powerful political office on land),which they could easily relate to. In addition, by having 2% of the respondents indicating that they are attracted to international content because of very high standard of production and unique stories, Zuku needs to engage more with local production companies to give further guidance on coming up with high quality productions and unique scripting of the stories. Key informants indicated that they engage with local production firms by acquiring ready content and organising local content forums for producers. Such forums should now involve intensive training towards quality programmes production and scripting. This will help to capture the remaining 2% of subscribers who still feel that local continent doesn't have captivating stories and not up to international quality standard.

4.4.3 Programme Viewership Trend By age

The respondents were asked how often they watch local programmes ranging from weekly basis to ones a month. The results are shown in the figure 4.7.

Figure 4.7: Programme viewership trend by age

Source: Researcher, 2014

According to the findings, 30% of respondents below 24 years watch local content on weekly and monthly basis which indicates a consistency in their viewership. This consistency was attributed to having enough time to reach home early enough and finish any pending homework to get enough time to watch these programmes. Thirty four per cent of respondents between the age of 25 and 30 years watch on weekly and monthly basis. This group reported the highest programmes viewership level hence become the target group that has a keen following on local programmes.18% of

respondents between 31 and 34 watch on weekly and monthly basis. While awareness of the programmes is high among this group, low viewership was recorded due to lack of time for programmes which telecast during weekdays. However consistency was indicated towards weekly and monthly viewership. 6% of respondents between 35 and 40 years watch on monthly basis while 14% of them watch at least once a month. This group recorded inconsistency towards weekly and monthly viewership; this was attributed to lack of time for programmes that telecast during weekdays. 8% of respondents between 41 and 44 years watch at least once a month with none watching on a weekly basis. The weekly basis turnout was attributed to the issue of lack of time.

The study was not able to capture respondents between the age of 45 and 50 years, 51 years and above. I deduced that subscribers between these ages had likelihood to have sent others to pay for their monthly subscription fee, and therefore could not be located among those who came to pay through cash.

4.4.4 Setting of Programme Viewership

Respondents were requested to indicate setting/environment in which they watch local content. Figure 4.8 shows the outcome.

Figure 4.8: Viewership Environment/Setting

Viewership environment/setting

0

35%

65%

- Watch with the family/friend
- Watch alone
- n=41
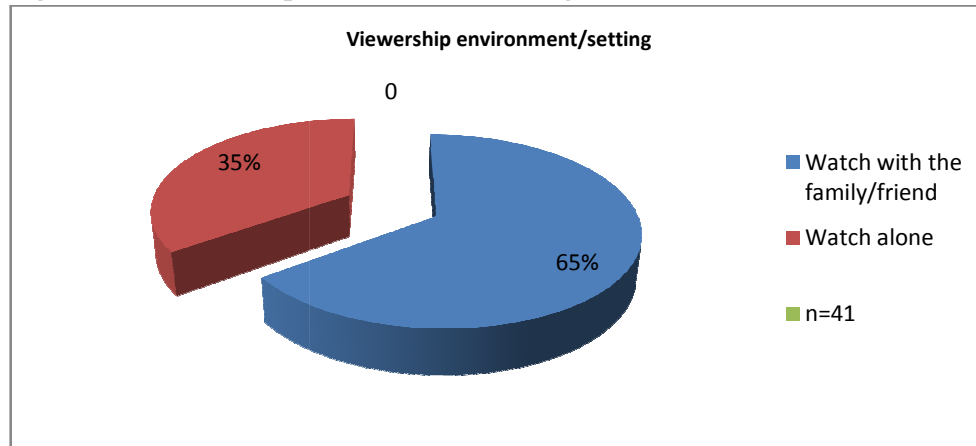
Source: Researcher, 2014

According to the findings, 65% of the respondents indicated that they watch the programmes with the family/friend. This shows that local content identify with the family values and represents the socio-political intrigues that one can easily relate with. The set-up of the scenes brings familiarity to the viewer. This mostly occurred with weekend telecast where people have time and not worried of tight schedules in the following day. Also 35% of the respondents indicated that they watch the programmes alone. From this, i deduced that those programmes that telecast on weekdays are likely to get lean viewership since people will watch the programmes while doing other activities as they prepare for next day work.

4.4.5 Programme Time Slots

Respondents were requested to indicate if they were comfortable with the current programmes telecast time which are Wednesday 8:30pm for Groove Theory, Monday 8:30 pm for State House and Saturday 9:30 pm for Leo or if they would prefer another broadcast day. The results are presented in figure 4.9 below.

Figure 4.9: Programme Time Slots
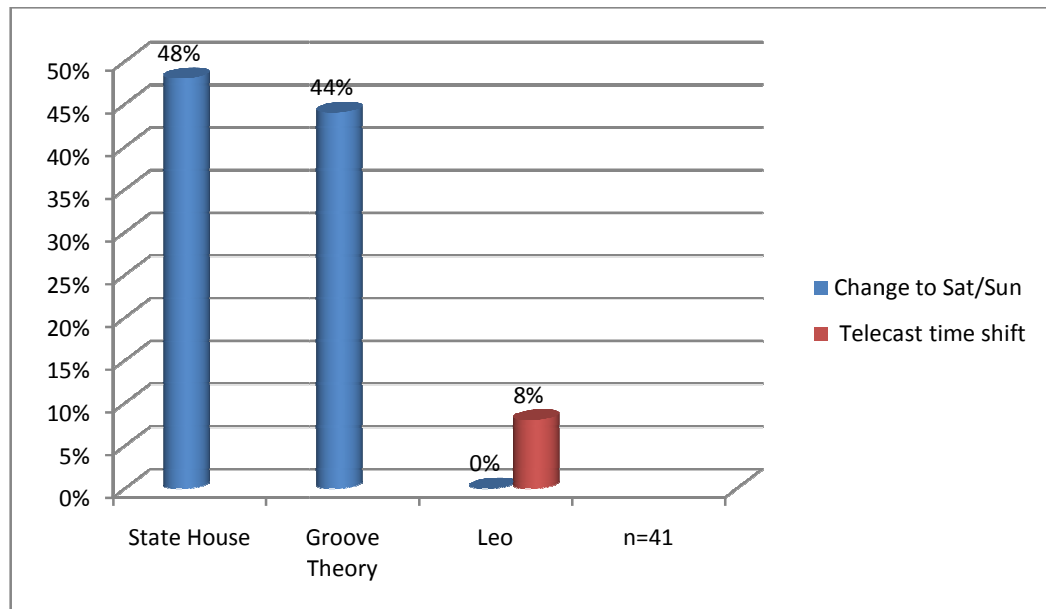
Source: Researcher, 2014

According to the findings, 48% of the respondents indicated that they would like telecast day for *State House* to change to Saturday or Sunday, 44% of the respondents indicated that they would like telecast day for *Grove Theory* to change to Saturday or Sunday while 8% of the respondents indicated that they would like broadcast time for *Leo* to change to 7:30pm instead of current time slot while a majority were happy with its current on-air slot which is 9:30pm. This study indicates that most subscribers are likely to watch more programmes on weekends than weekdays. This is because most people are out of office during those days and hence would enjoy watching the programmes from the comfort of their homes.

4.4.6 Programmes Video Quality
The respondents were requested to rate the video quality of local programmes. The results are presented in the figure 4.10.

Figure 4.10: Programmes Video Quality
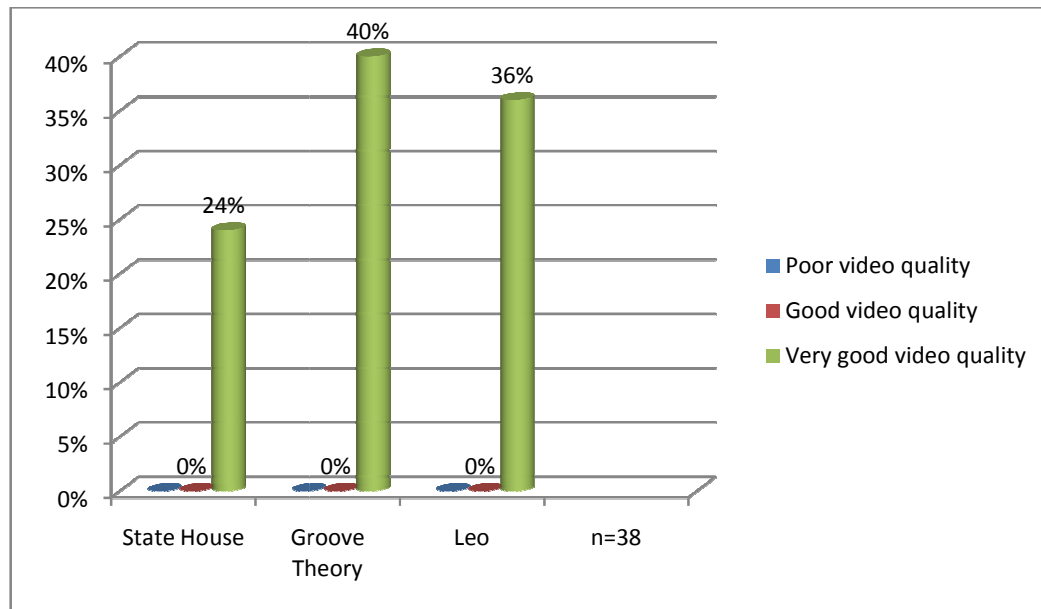
Source: Researcher, 2014

From the findings, 24% of the respondents indicated that *State House* had very good video quality, 40% indicated that *Groove Theory* very good video quality while 36% indicated that *Leo* had very good video quality. From the findings, small percentage of respondents endorsed *State House* as having very good video quality despite being the most favourite local programme on Zuku platform. However, this ratings were from a lay man`s point of view since subscribers were not video experts but acted upon the impression that they got while watching these programmes which can be influenced by many factors such as the type of television set one had at home. No programme was reported to have poor video quality thereby showing that most subscribers are happy with the video quality of local content that is aired on Zuku platform.

4.4.7 Programmes Audio Quality

The respondents were requested to rate the audio quality of local programmes. The results are presented in figure 4.11.
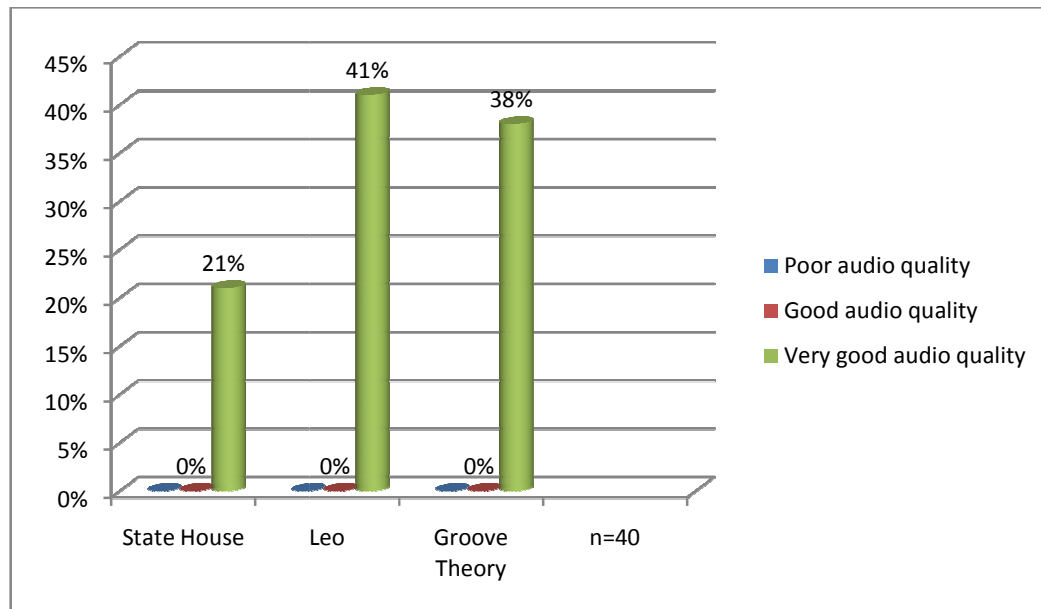
Figure4.11: Programmes Audio Quality

Source: Researcher, 2014

From the findings, 21% of the respondents indicated that *State House* had very good audio quality, 41% indicated that *Leo* had very good audio quality and 38% of the respondents noted that *Groove Theory* had very good audio quality. The rating, however, of audio quality were from a lay man`s point of view since subscribers were not sound experts but acted upon their own personal preference of what a clear sound should be, a process which might be influenced by the type of audio speaker a person have in the house. The outcome shows that subscribers are not disappointed when it comes to audio quality of local programmes on Zuku platform.

4.4.8 Relation of Programmes Story Line with Local Context
The respondents were further asked to indicate whether the story line of the local programmes relate very well with their local context. The results are shown in figure 4.12.

Figure 4.12: Relation of programmes story line
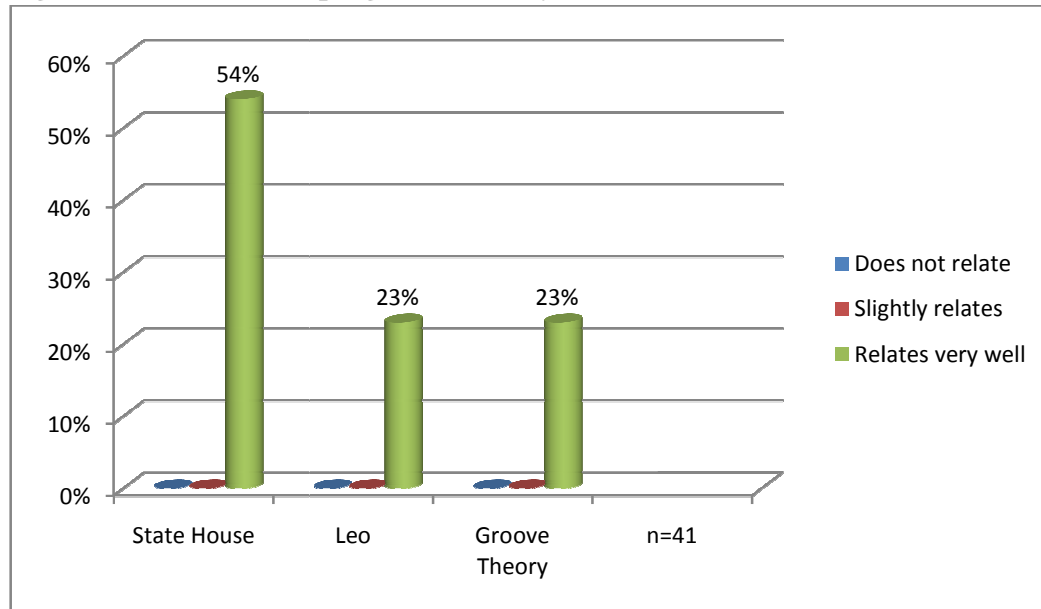
Source: Researcher, 2014

From the findings, 54% of the respondents indicated that the story line of *State House* relates very well with their local context and it is a programme they can easily identify with. I found that popularity of *State House* among subscribers was attributed to its story line that subscribers could easily identify with. While its video and audio quality had been rated as moderate by subscribers, it was still the most popular local content on Zuku platform. *Leo* and *Groove Theory* were rated as having above average audio and video quality. Only few subscribers could identify with the stories in the programmes hence making the programmes to be less popular among Zuku subscribers. The study deduced that what drives most subscribers to watching local content on Zuku platform is the ability of the programme to connect with viewership in terms of movie settings, fiction and drama.

4.4.9 How Zuku Engages with Local Production Firms To Promote Local Content

Interview with key informants involved how Zuku engage with local production firms in order to promote local content. From the findings, the respondents indicated that Zuku promotes this engagement by acquiring ready content produced by various local production firms. They also commission production houses to produce local content for their platforms. Zuku has already commissioned several production companies to

work on their local sports content such as *Setting the Pace*, *Zuku University Basketball League* (*ZUBL*).In addition, Zuku promotes such engagements by organising local content forums for local television programme producers.

4.4.10 How Zuku Creates Awareness of Local Content

This study sought to find ways through which Zuku create awareness of local content on its platform. From the findings, Zuku employs an effective On-Air strategy where local content is promoted which involves producing in house captivating and creative promos on a monthly basis in order to highlight monthly episodes scheduled for telecast. To further entrench the strategy,Zuku has a dedicated channel named 'Zuku Zone' where these promotional materials are scheduled to air on a 24 hour basis. Secondly, Zuku ensures optimum use of other platforms such as Face book, Twitter and You-Tube channel. Zuku has developed a You-tube channel where one can watch local programmes. Use of Face book and Twitter enable the service provider to highlight its premium local content, it also enable the company to crowd source so as to get views regarding local content on the platform. Through marketing, Zuku creates awareness by advertising its content on radio, billboards and branding some of the public spots such as the Nyayo stadium round-about in Nairobi.

4.4.11 How Zuku Responds to Viewer Demands on Local content and Consumption Patterns

This study sought to find out Zuku response towards viewer demand on local content and consumption pattern of local programmes on its platform. From the findings, Zuku responds to viewer demand of local content by incorporating more local content for the audience on the platform. Zuku does this by increasing budget for local productions so as to buy more already produced programmes and commission other local productions hence address growing needs. Towards the consumption patterns, Zuku re-schedule the On-Air time slot for the favourite local programmes based on subscriber preference. It also responds to the pattern by introducing re-run (repeats) of the programmes so as to serve subscribers who might have missed an episode of a favourite local programme.

In addition, Zuku has launched an On-Air promo material that educates its subscribers on how to use the personal video recorder function in their set top boxes so as to record any programme that might be airing when one is away.

Key informants further indicated that they respond to consumption patterns by ensuring a dependable and error free electronic programme guide that can help one to know in five days` time the programme he/she will be watching at a particular time. However, some respondents raised concern on dependability of electronic programme guide displayed by set top boxes as some subscribers noted certain instance of conflict of information between set top box display and On-Air programme.

4.4.12 How Zuku deals with Quality Challenges of Local Content

Key informants were further asked to show ways through which Zuku deal with quality challenges of local content and factors that determine acquisition of the same. According to the findings, what guides acquisition of local content by Zuku is the consumption trend in the market and subscribers behaviours, this is to say that when more subscribers demand more local content then Zuku as a service provider acquire more local content to air on its platform.

Zuku local content uptake is also guided by audience needs in each territory, meaning that if customers in Mombasa relates well with local content that is acted in Swahili language, then more content will be acquired to serve Mombasa territory. This idea gave birth to Zuku Swahili channel. To deal with quality challenges, Zuku produces and commissions its own content by setting quality standards for the productions. Key informants further indicated that Zuku organises training forums for various programme producers so as to help raise standards in the industry thereby leading to an outcome of quality productions.

CHAPTER FIVE

SUMMARY OF FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

5.0 Introduction

This chapter presents a summary of findings, discussion, conclusions and recommendations for practice and further research on the problem. This study aimed at establishing consumption patterns of local programmes on pay television in Kenya. The specific objectives were to establish factors determining uptake of local content, to establish subscribers' perception of local content in terms of quality and story line, establish response of service provider towards consumption patterns.

5.1 Summary of the Findings

From the findings, 58% of the respondents in this study were male while 42% were female. The study also established that most of the respondents were aged between 31 and 34 years. This showed that most subscribers who use Zuku pay television services lies between this age bracket. Their response rate was 58%. In addition, most respondents in this study had bachelors' degree as their highest level of education. They formed 60% of respondents in the study. This further showed that the respondents had required information to meet objectives of the study. Most respondents in this study were cable platform subscribers. This indicated that most customers on cable platform were located not far from the Zuku head office hence opted to pay their monthly subscription fee through cash to the service provider. The study was not able to capture respondents between the age of 45 and 50 years, 51 years and above respectively. This infer that a good number of pay television subscribers lies below the age of 44 years.

5.1.1 Consumption Patterns

This study sought to establish consumption patterns of local programmes on pay television in Kenya. The study established that most Zuku subscribers were aware of all local programmes on its platform. The awareness rate was at 56%. Respondents who indicated awareness of all local programmes were mostly below the age of 24 years, 25 to 30 years and 31 to 34 years. Although the level of awareness of local programmes was high, consistency in viewership was poor since most of the respondents recorded to have watched any of the programmes in the last 4 weeks and

not 7 days (weekly) as it ought to be. Only 34% of the respondents noted to have watched a programme on a weekly basis. Despite high level of awareness of local programmes, 42% of the respondents could not recall *Leo* among the local programmes. Also, 2% of respondents hardly recalled any local programme on Zuku platform.

State House emerged the most favourite local programme on Zuku platform with 52% of the respondents showing interest. This was mostly attributed by the ability of the programme to connect with viewership in terms of movie settings, fiction and drama. 2% of the respondents were not interested in any local content and instead noted international content namely *Nat Geo* and *Crime Lab* as their favourite programmes. It was also established that respondents between the age of 25 and 30 years showed consistency in programmes viewership. This group also were the highest local programme viewers on Zuku platform. It was also established that most respondents watch local programmes in the company of friends or family members hence most local programmes were found to be family oriented. 65% of the respondents watched the programmes with their family members/friends. Further, it was established that subscribers' preferred local programmes to be slotted on weekends rather than weekdays and only the repeats to take place during weekdays, hence high viewership was found to be concentrated during weekends than weekdays.

Subscribers' noted to be happy with video quality of local programmes with *Groove Theory* being noted as the programme with the best video quality by 40% of the respondents. No local programme was noted to have poor video quality. On audio quality, local programmes were established to have very good audio quality with Leo having the best audio quality. No programme was noted to have poor audio quality. It was established that local programmes on Zuku platform have story lines and are acted in context that connect with the viewership in terms of movie setting, fiction and drama. *State House* was established as the best local content with story line and acted in a context that relate well with the audience. Fifty four per cent of the respondents were established to like *State House* because of this connection. No local programme was established to have a disconnect in its story line.

5.1.2Subscribers' Perception of Local Content

The study also sought to establish subscribers' perception of local content aired by Zuku in terms of quality and story line. This study established that subscribers were positive towards the audio and video quality of local programmes aired by Zuku. They were rated as having very good audio and video quality. The ratings were at 40% for video and 41% for audio respectively.

It was also established that the story line of local programmes had the ability to connect with the viewership. Positive feedbacks were noted from the subscribers concerning the quality and story line of the content. This was attributed to the service provider strategy towards content quality such as producing and commissioning its own content hence setting the pace for production standards in the industry and organising forums to improve the production standards in the industry. It was established that *State House* was rated as the best local content with a story line that connected well with the viewers which was at 54%. *Groove Theory* was established as the best local content with in terms of video quality at 40% while *Leo* was established as the best local programme in terms of audio quality at 41%.

5.1.3 Factors Determining uptake of Local Content

The study sought to establish factors that determine uptake of local content by Zuku. It was established that Zuku incorporates more local content on its platform based on the needs of the audience in each territory. Zuku serves different audience in various regions that has a preferred language such as the Swahili speaking audience where Zuku will acquire movies or programmes in Kiswahili so as to resonate better with the subscribers.

It was established that consumption trends and behaviour of subscribers guide Zuku towards acquisition of local content. Through market research, feedback from social media platforms such as Facebook, Twitter, hits on Zuku, YouTube channel and from customer care team, Zuku is able to identify genre of local content which tend to attract more viewership hence invest in buying or commissioning such genre to be produced by local production firms.

5.1.4Response of Service Provider Towards Consumption Patterns

The study further sought to establish the response of service provider towards consumption patterns. It was established that Zuku responds by creating an effective On-Air strategy where local programmes are promoted. This further involves re-scheduling the On-Air time slots for favourite local programme in line with subscribers' preference. It also responds to the consumption by introducing programme re-runs (repeats) so as to serve audience who might have missed an episode of their favourite programme. In addition, it was established that Zuku responds to consumption patterns by introduction of **+1** channel which means creating two similar channel On-Air play list where one is an hour ahead so as to cater for subscribers who might have missed some part of the programme. Moreover, the service provider responds to consumption patterns by creating awareness on how to use personal video recorder device on the set top box so that one can be able to record a programme that will be broadcasted when he/she is away and be able to watch later.

5.2 Conclusion

This study concludes that there is high awareness regarding local content that is on the Zuku platform. In addition, most subscribers felt that the programmes have very good video and audio quality while their story line also relates to the local context which was also a reason why subscribers were interested in the programmes. In addition, it was established that there is consistency in local programmes viewership among people between 25 and 30 years of age and little or no consistency of viewership among Zuku subscribers between the age of 35 to 40 years and 41 to 44 years. It was also noted that 2% of Zuku subscribers are not aware of any local content on Zuku platform but instead aware of international content on Zuku platform. It was also noted that local programmes on Zuku platform are family oriented hence reason why most respondents were watching the programmes in company of family members.

It was further established that local viewership of programmes on Zuku is concentrated on weekends and not weekdays. There was a preference for programme repeats to be slotted on weekdays. However, fresh episodes should be moved to weekend slots. The study concludes that incorporation and commissioning of more local programmes by Zuku shows that indeed consumption of local programmes have

increased and the consumption pattern is guided by the ability of the programmes to connect with the viewer.

5.3 Recommendations

From the findings, more Zuku subscribers prefer to watch local content on Zuku platform during weekends than weekdays. Therefore, the study recommends that Zuku needs to shift telecast of its local programmes during weekends so as to increase consumption of the programmes among subscribers. From the findings, television viewership is more concentrated during prime time (7:00pm to 10:00pm). To fully capture audience within this segment, the study recommends that Zuku needs to establish a block programming scheduling strategy within this hour on its local content. This study also established that 2% of Zuku subscribers are still not aware of local programmes on its platform. To help capture this group of people, Zuku should increase promotion of local content on its platform and other external channels such as billboards, radio stations and television stations.

It was also established that international content is still superior to most local content in terms of quality. To help beat this competition, Zuku needs to set its local content production standards to match that of international production companies so as to entice more of its subscribers to watch local content.

From the findings, it was also established that third party channels that telecast international content during prime time acts as an influence towards shift in channel viewership during such hours. For Zuku to retain high local content viewership during prime time, the study recommends for a counter programming strategy in order to beat the competition.

5.4 Recommendations for Further Studies

This study established that there was an increase in consumption of local programmes among pay television subscribers and changing viewership pattern towards such consumption among Zuku subscribers. This study therefore recommends further studies in the area regarding uptake level of local content on pay television industry in

Kenya. The study also recommends further studies on local content genre that commands high viewership in pay television in Kenya.

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APENDIX I: LETTER FOR RESEARCH PERMISSION

TO,
THE HUMAN RESOURCE MANAGER,
WANANCHI GROUP,
P.O.BOX 10286-00100,
NAIROBI- KENYA.

Dear Sir/Madam,

RE: Permission to conduct a research study on 'Consumption Patterns of Local Programmes on Pay Television in Kenya. A Case Study of Zuku Television'
I am a student at the University of Nairobi`s School of Journalism carrying out research project as part of the course requirement for Master of Arts in Communication Studies.

The study seeks to establish consumption patterns of local programmes on pay television in Kenya with specific focus on Zuku as a service provider. I would like to conduct an open ended interview with subscribers who have come to pay for their monthly subscription fee at the head office located along Mombasa Road, Gateway Business Park for a period of 10 days. The findings of this research will be confidential and strictly for academic use and at no time will it be disclosed to a competitor or any other public forum.

Your kind permission will be highly appreciated.

Yours faithfully,

Denish Otieno

TO WHOM IT MAY CONCERN

Dear Sir/Madam,

RE: Request for participation in a research study on 'Consumption Patterns of Local Programmes on Pay Television in Kenya. A Case Study of Zuku Television'

I am a student at the University of Nairobi's School of Journalism carrying out research project as part of the course requirement for Master of Arts in Communication Studies.

The study seeks to establish consumption patterns of local programmes on pay television in Kenya with a specific focus on Zuku as a service provider. The research findings will be confidential and strictly for academic use and at no time will your name be mentioned anywhere in the report.

Your honest participation will be highly appreciated.

Yours faithfully,

Denish Otieno

APPENDIX III: QUESTIONNAIRE

This questionnaire consists of two parts; kindly answer all the questions by ticking in the appropriate box or filling in the spaces provided.

General Information

1. Your gender   Male [   ]   Female [   ]

2. Your age bracket (Tick whichever appropriate)

     Below 24 years   [   ]   25 – 30 years [   ]

     31 – 34 years   [   ]   35 – 40 years [   ]

     41 – 44 years   [   ]   45 – 50 years [   ]

     Over – 51 years   [   ]

3. What is your highest education level? (Tick as applicable)

     Primary Certificate [   ]   Secondary Certificate [   ]

     Diploma/Certificate [   ]   Bachelors' degree   [   ]

     Postgraduate degree [   ]   Others-specify..................

4. Tick which platform you have subscribed to.

   Cable [   ]   Satellite [   ]

Programs Consumption Patterns

5. Are you aware of all the following local programmes on Zuku?

     (a) State House   (b) Leo   (c) Groove Theory

       Yes [   ]   No [   ]

6. If No. Indicate which program/s you are aware of

     ....

7. Tick your favourite programme below.

   State House [   ]   Leo [   ]   Groove Theory [   ]

8. Give reason why you like the program/s.

   ....

   ....

9. Have you watched any of the above named programs in the past 7 days?

   Yes [   ]   No [   ]

10. If yes, state which program.

....
11. Have you watched any of the stated program/s in the past 4 weeks?

    Yes [   ]   No [   ]

12. If yes, state which program/s.

    ....
13. State the setting in which you watch above named program/s.

    Watch with the family/friends [   ]   Watch alone [   ]

14. Apart from the current time slots (8:30 pm on Wednesday for Groove Theory and 8:30 pm on Monday for State House, 7:00 pm on Saturday for Leo), is there a time slot and specific day you would prefer to watch any of the program/s.

    Yes [   ]   No [   ]

15. If yes, state the program/s, time and day.

    ....

Subscribers' Perception

16. Rate the following programs in terms of video quality.

Programs	Video Quality		
	Poor	Good	Very Good
State House			
Leo			
Groove Theory			

17. Rate the following programs in terms of audio quality.

Programs	Audio Quality		
	Poor	Good	Very Good
State House			
Leo			
Groove Theory			

18. Rate how the stories in the following programs relate with your local context/environment.

Programs	Storyline in relation to context		
	Does not relate	Slightly relates	Relates very well
State House			
Leo			
Groove Theory			

APPENDIX IV: KEY INFORMANT INTERVIEW GUIDES

1. What factors determine uptake of local content by Zuku?

2. What are the ways in which Zuku engage with the local production firms so as to promote local content?

3. How does Zuku create awareness of local content on its platform?

4. How does Zuku as a service provider respond to viewer demand on local content?

5. How does Zuku respond to consumption patterns of television programs on its platform?

6. How does Zuku plan to deal with challenges of quality of local content?