



COUNTRY REPORTS

Media Research for One Continent

Consolidated by Celia Collins - Carat Africa

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ANGOLA



Information Supplied by: Filipa Oliveira

Country Overview



Legislation changes 2014:

→ Published results for Census 2014 have only very few indicators.

→ Next to each figure presented is the source.

Basic Country Statistics

	% or No:
Population	24.383.301 (Census 2014)
Urbanisation vs Rural	62,3% of total population lives in urban areas (Census 2014)
GDP growth rate in 2014	3.9% (2014 est. - "The World Fact Book" - CIA)
% living below poverty line	40.5% (2006 est. - "The World Fact Book" - CIA)
Literacy in Adults over 15yrs	71.1% (2015 est. - "The World Fact Book" - CIA)
% of population below 15yrs	43.2% (2014 est. - "The World Fact Book" - CIA)
Administrative Division	18 Provinces
No. of Television Sets	NA - 98% Homes with TV - 55% Homes have 1 TV set / 29 % Homes have 2 TV sets (AMPS Luanda 2014)
No. of Radio Sets	NA - 75% usually listens. 85% listens at home / 37% listens on mobile phone (AMPS Luanda 2014)
No. of Languages	Portuguese (official) and several national languages
No. of Religions	Roman Catholics, Christians, Protestants
Local Currency	Kwanza
Exchange Rate (US\$)	109,00 Kz
Latest Censor (Year)	2014

Current Political Environment

Current President	José Eduardo dos Santos
Ruling Party	MPLA
No. Of Cell Phones	NA - 91% has at least one mobile phone (AMPS Luanda 2014)
No. Of Landlines	NA - 3% Homes have land line (AMPS Luanda 2012)

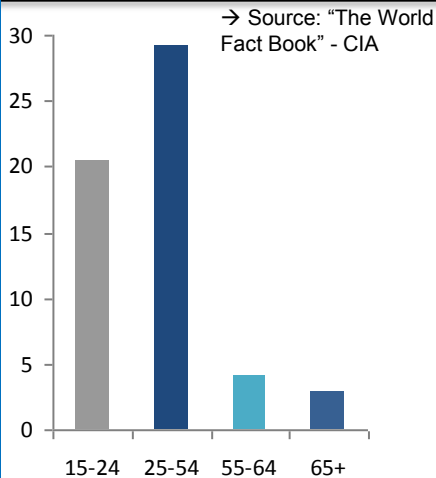
TOTAL UNIVERSE SIZE

24.383.301 (Angola)

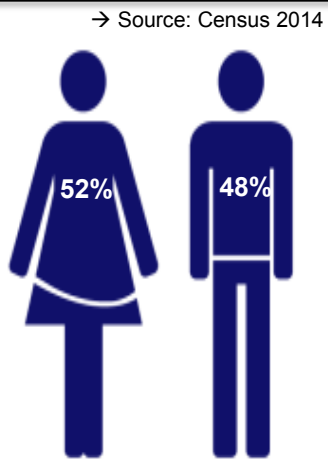
(Census 2014)

COUNTRY STATS

AGE PROFILE



GENDER



ETHNIC GROUPS

Ovimbundu 37%,
Kimbundu 25%,
Bakongo 13%,
mestico (mixed European and native African) 2%,
European 1%,
other 22%

LANGUAGE



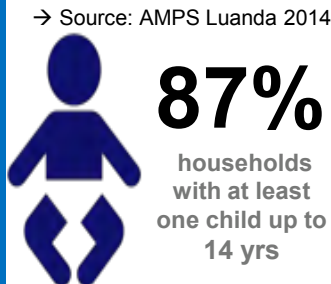
Portuguese
(official) and
several
national
languages

BANKING

→ Source: AMPS Luanda 2014

Have a bank account - Luanda (population aged 20+) 50.4%

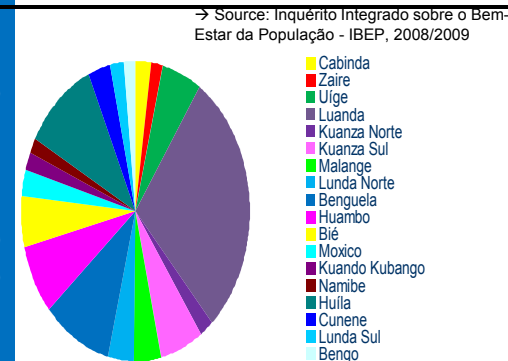
CHILDREN



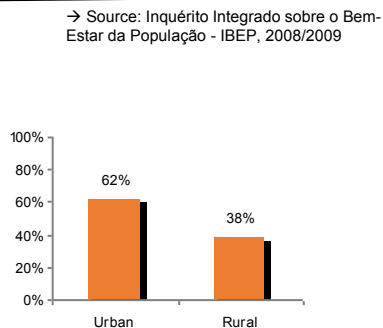
POPULATION

(growth rate: 2.78%);
birth rate: 38.97/1000;
infant mortality rate: 79.99/1000;
life expectancy: 55.29

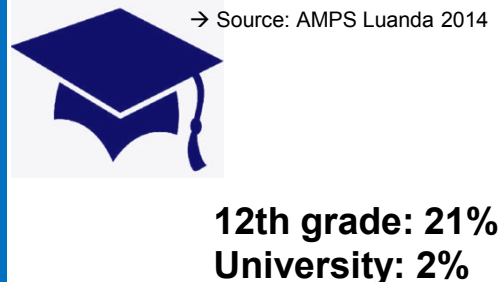
PROVS BREAKDOWN



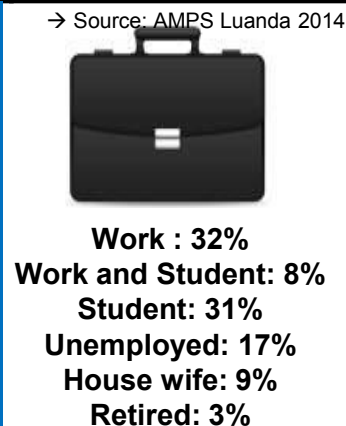
URBAN VS RURAL



EDUCATION



EMPLOYMENT



PRESIDENT

Jose Eduardo Dos Santos



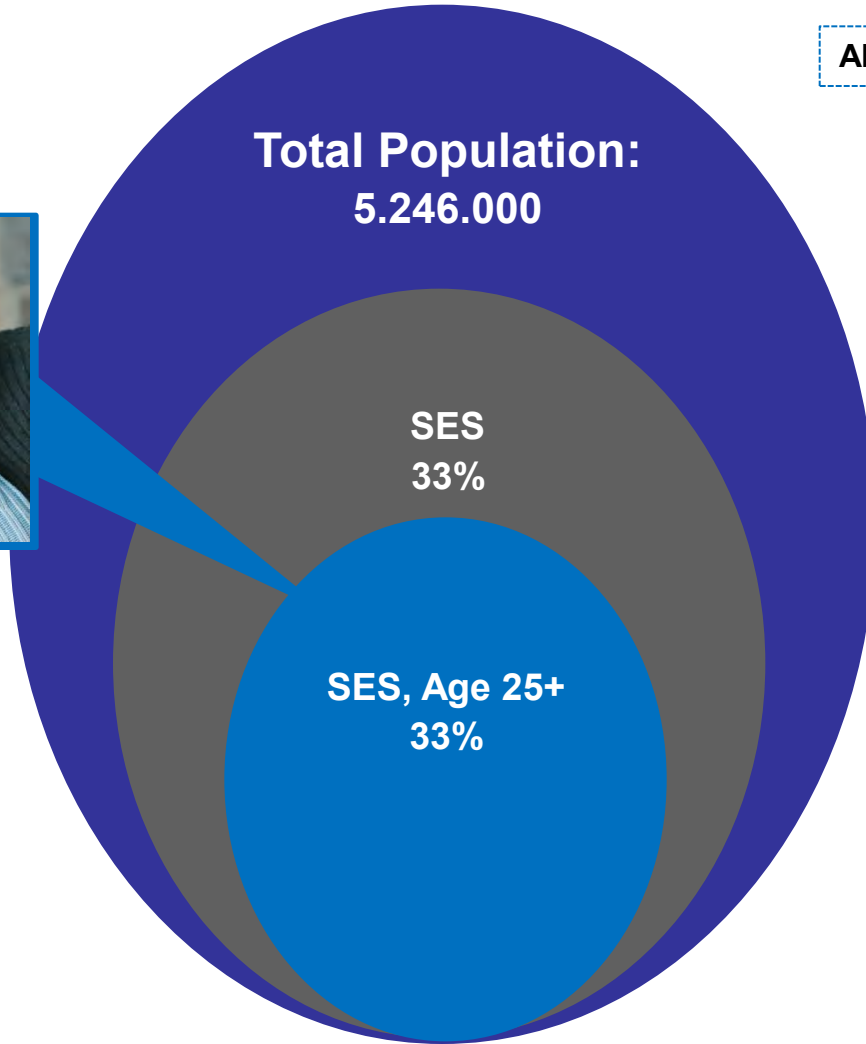
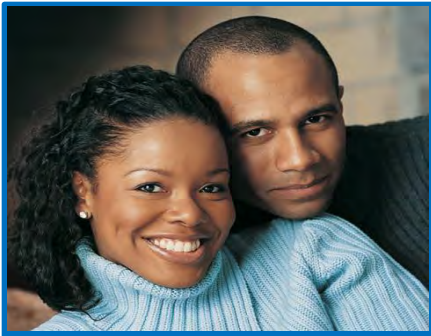
SES BREAKDOWN

All Adults

→ Source: Marktest Base Study 2007

→ Source: AMPS Luanda 2014

→ Source: AMPS Luanda 2014



RESEARCH PRODUCTS

ANGOLA AMPS

Luanda (annually)
Benguela

Media Monitoring



Ad-Hoc research

Mystery Client
Focus Group
In-depth interviews
Desk research
Quantitative



RESEARCH PRODUCTS

Marktest Media Monitoring

- Television

 - TPA1, TPA2, TV Zimbo, Globo, Record, Zap Novelas, AfroMusic Channel

- Radio

 - R. Luanda, R. Escola, R. Ecclesia, R. 5, R. Mais, R. Cazenga

- Press

 - all publications – newspapers and magazines

- Television and radio collection: patternmatching and manual

- Press collection: manual

Country Research

AMPS Luanda

AMPS Benguela

Last Survey Released	2014	Last Survey Released	2014
Type of Interview Sample Size	3.519 Adults age 15+	Type of Interview Sample Size	1.606 Adults, aged 15+
Scope of Survey (Universe)	Luanda Province	Scope of Survey (Universe)	Benguela Province (Benguela and Lobito Municipalities)
Media Covered Brands covered	Print / radio / television / internet / habits and behaviours / mobile communication / food products consumption / alcoholic and non- alcoholic beverage consumption / banks	Media Covered Brands covered	Print / radio / television / internet / habits and behaviours / mobile communication / food products consumption / alcoholic and non- alcoholic beverage consumption / banks
Survey Funding Cost of Survey	Self Funding	Survey Funding Cost of Survey	Self Funding
Next Survey	2015 (ongoing fieldwork June-July)	Next Survey	---
Sample Size & Methodology	3.520 interviews PAPI	Sample Size & Methodology	3.519 interviews PAPI

Media Overview - Channels & Media Reach

	2011		2012		2013		2014		
Medium	No.	REACH (usually watch, listen, read)	No.	REACH (usually watch, listen, read)	No.	REACH (usually watch, listen, read)	No.	REACH (usually watch, listen, read)	
TV channels	3	96,9%	3	95,9%	3	98,3%	3	96,8%	→ 3 National channels (open channels) + international channels (pay-TV)
Radio channels	13	80,5%	13	78,5%	13	76,1%	13	74,1%	
Newspapers	17	20,7%	17	60,4%	20	63,4%	16	62,9%	
Magazines	15	7,2%	15	43,2%	19	43,2%	18	42,0%	

Television Consumption



97%

Watch TV

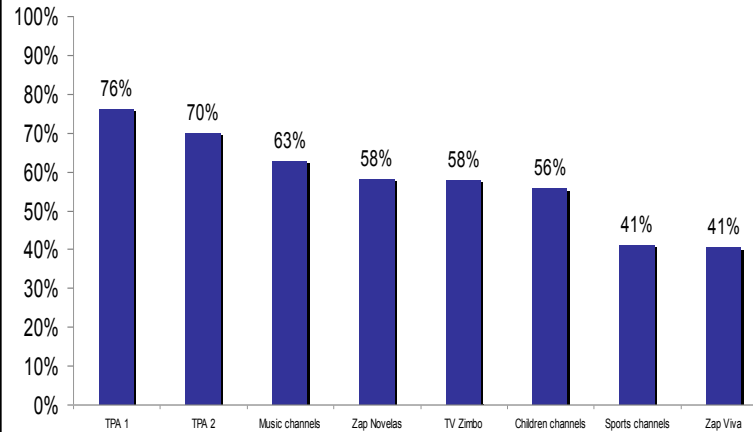
25% are heavy viewers (4+ hrs per day)

81% has pay-tv

→ Source: AMPS Luanda 2014

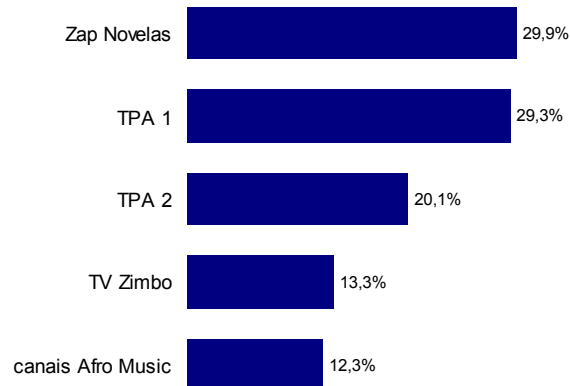
TOP STATIONS

TV CHANNELS TOTAL AUDIENCE



→ Source: AMPS Luanda 2014

preferred tv channel (total 3 references)



→ Source: AMPS Luanda 2014



Radio Consumption

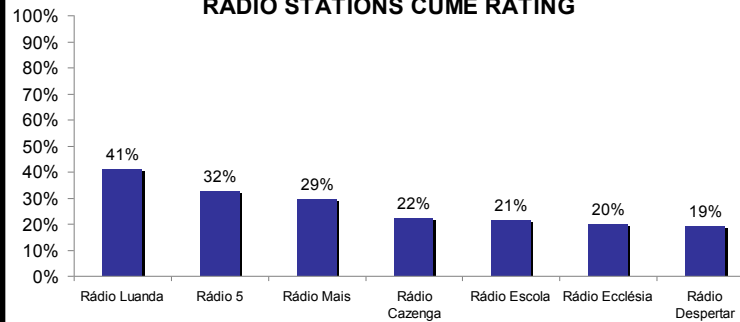


74%
Listen to radio

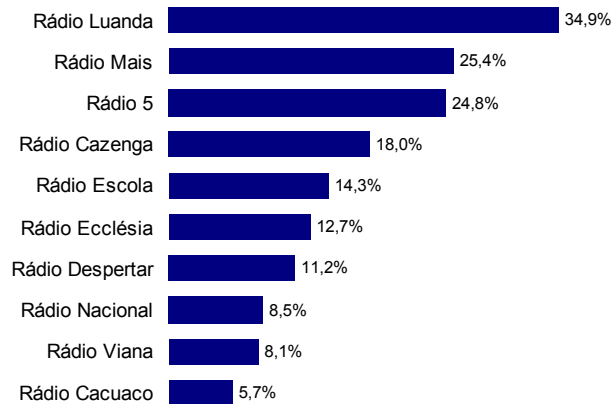
→ Source: AMPS Luanda 2014

TOP STATIONS

RADIO STATIONS CUME RATING



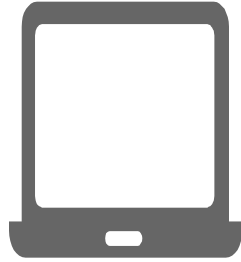
preferred radio station (total 3 references)



→ Source: AMPS Luanda 2014



Mobile/Digital Consumption



**Access Internet:
38%**

→ Source: AMPS Luanda 2014

- mostly for web surfing and / or chatting;
- Facebook and Google are the most accessed sites



**91% have a cell
phone**

→ Source: AMPS Luanda 2014



Print Consumption

PRINT / PRESS

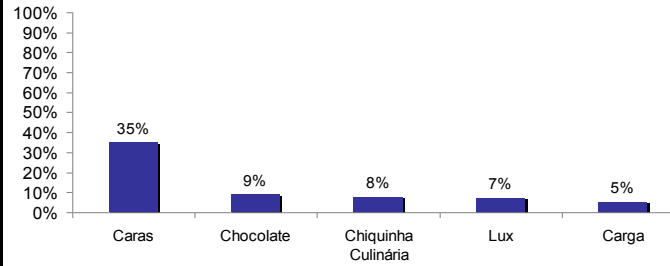


42%
Read
magazines

→ Source: AMPS Luanda 2014

TOP TITLES

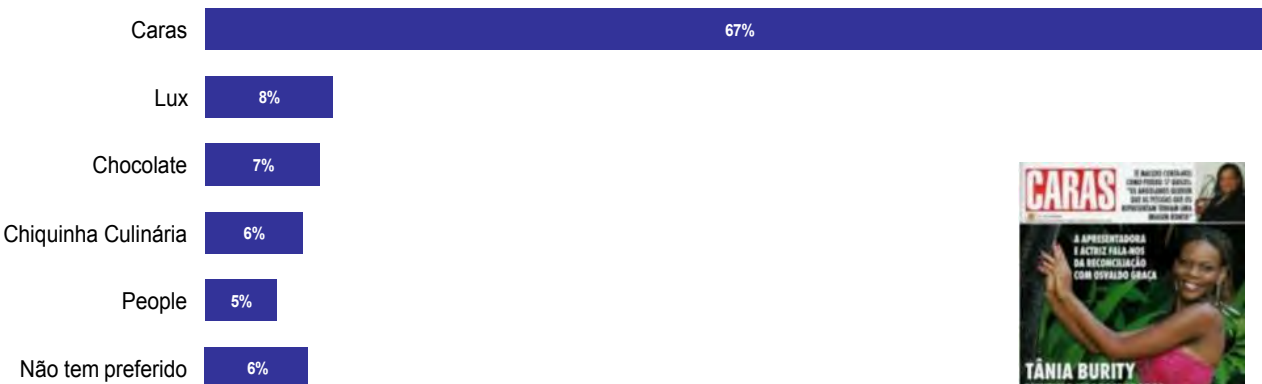
MAGAZINES MAXIMUM COVERAGE



→ Source: AMPS Luanda 2014



Preferred magazine



GHANA



Information Supplied by: **IPSOS GHANA**

GHANA

Country Overview



Legislation changes 2014:

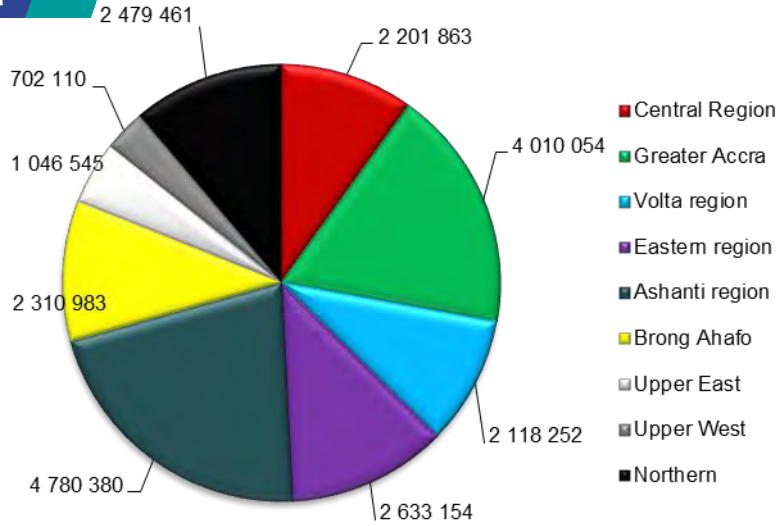
BASIC COUNTRY STATISTICS

Population	24,658,823.00
Urbanization vs. Rural	12,545,229(Urban) : 12,11594(Rural)
GDP Growth Rate in 2010	5.2%
Living below the Poverty Line	28.5%
Literacy in Adults over 15years	71.5%
% of population below 15years	38.9%
Administrative Division	Ten Regions: 250 Districts
No. of Television	28 licensed
No. of Radio	247 licensed
No. of Languages	Over 79
No. of Religions	3 main
Local Currency	GHc
Exchange Rate (USD)	GHc 3.8 : 1 USD

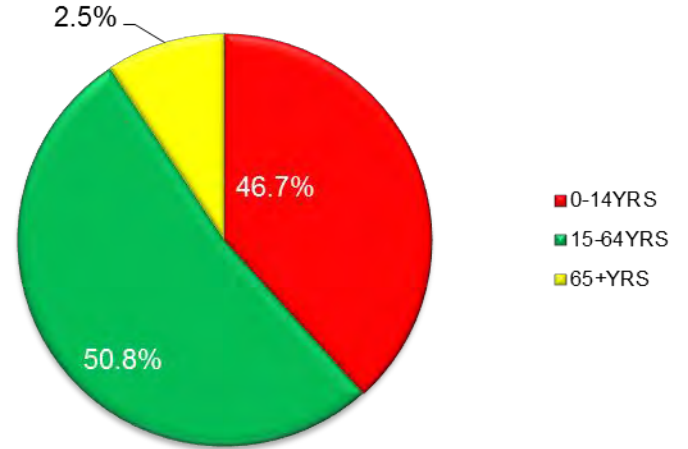
CURRENT POLITICAL ENVIRONMENT

Current President	John Dramani Mahama
Ruling Party	National Democratic Congress
No. of cell phones	47.8% (12yrs and older)
No. of landlines	2.3%

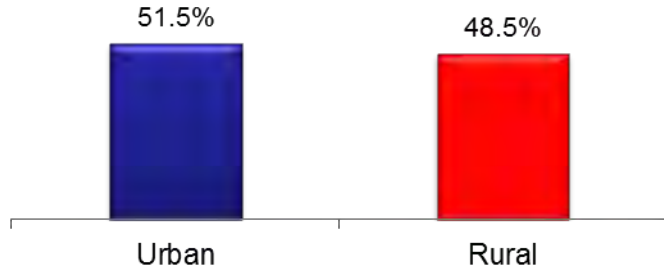
Country Statistics-GHANA



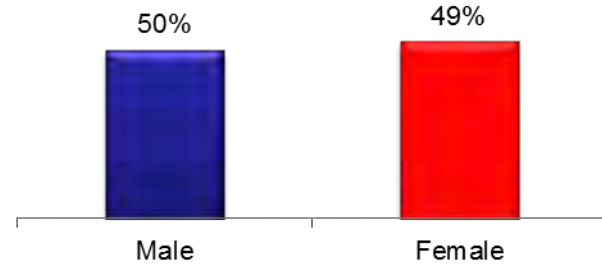
AREA



AGE



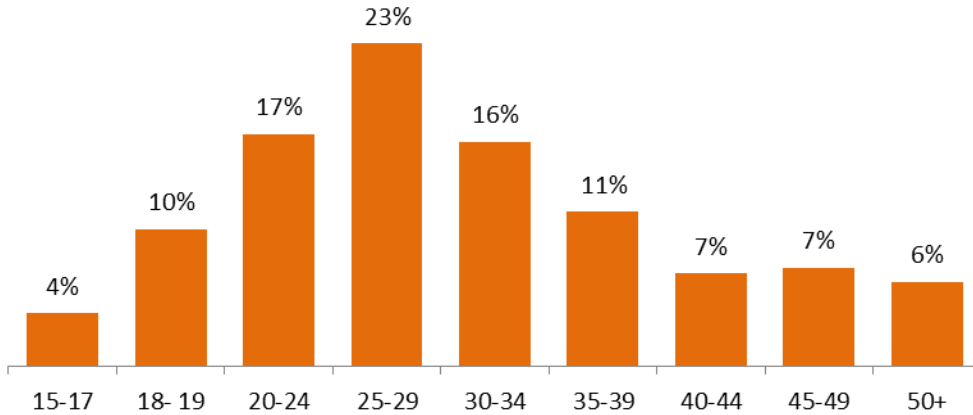
RURAL / URBAN



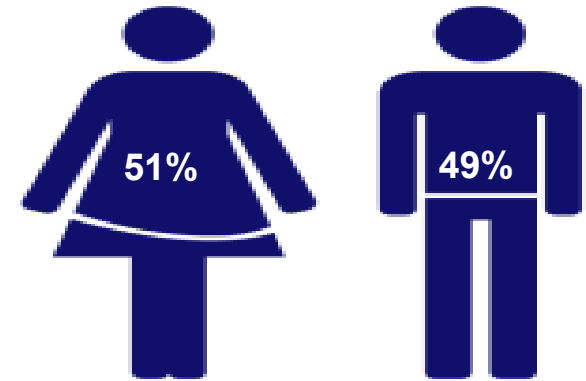
GENDER

COUNTRY STATS

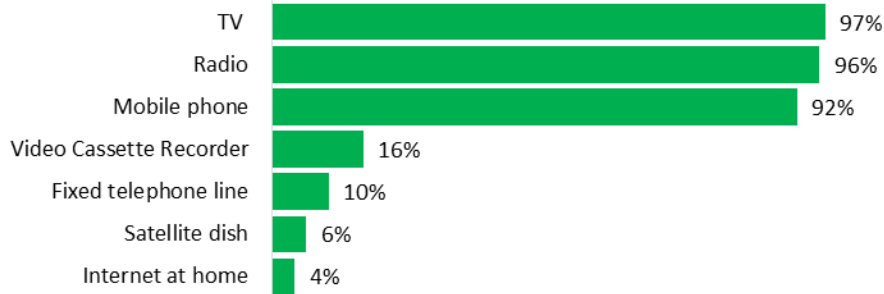
AGE PROFILE



GENDER



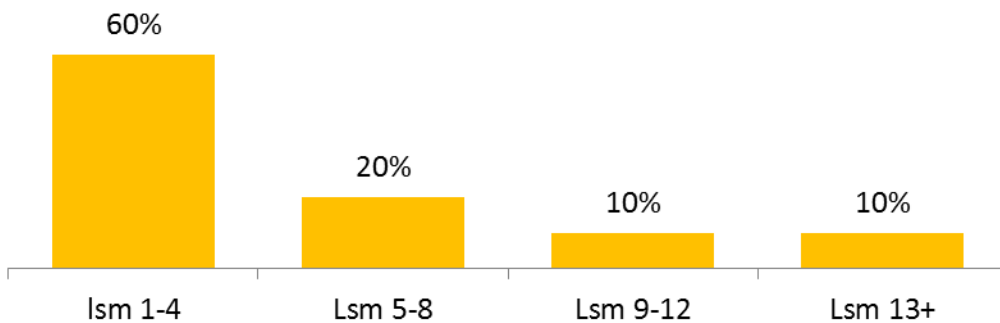
MEDIA ACCESS



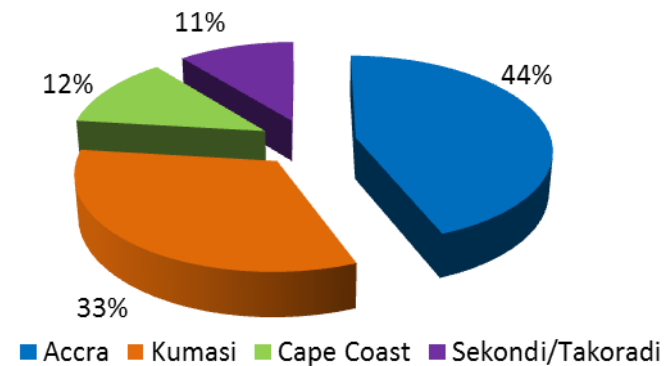
INTERNET ACCESS

49%

LSM CLASSIFICATION



DISTRIBUTION BY REGION



Country Statistics cont...

SEC		% of Population
UPPER SOCIAL CLASS	(AB)	15%
MIDDLE SOCIAL CLASS	(C1)	15%
MIDDLE SOCIAL CLASS	(C2)	20%
LOWER SOCIAL CLASS	(D)	21.5%
LOWER SOCIAL CLASS	(E)	28.5%

SEC's

MEDIA MONITORING



- Ipsos pioneered electronic media monitoring in Ghana in 2001. Ipsos the only company that offers an independent Ad tracking service with proof of flight through 24hrs media recordings.
- With 5% fee on advertising budget, Ipsos advertisement verification service is a fast, reliable and independent tracking service
- An audio matching technology is used thereby guaranteed accuracy with manual intervention. Manual intervention helps in capturing the Live presenter mention and Announcements.
- Monitoring is proprietary.
- Compliance levels
 - ❖ **Radio 60%**
 - ❖ **TV 65%**

MEDIA CONSUMPTION HABIT

- Ipsos diary Audience Measurement relates media consumption.
- Average audience per station per every 15 minutes. Channel reach, Channel share of audience,
- Consumption & activities by living standard measures data can be generated.



Subscription

Item	Five Regions (USD per Month)
TV & Radio	2,000.00
TV Only	1,000.00
Radio Only	1,000.00

Some Audience Data Clients



GAMPS

Media Diaries

Last Survey Released	2009	Last Survey Released	May 2015
Type of Interview Sample Size	1,745 Adults age 15+	Type of Interview Sample Size	700 Adults, aged 15+
Scope of Survey (Universe)	Urban and Rural	Scope of Survey (Universe)	Urban
Media Covered Brands covered	Print / Broadcast / outdoor/ Road show attendance/ Internet Usage/ Cinema Attendance	Media Covered Brands covered	Radio and TV
Survey Funding Cost of Survey	Self Funding	Survey Funding Cost of Survey	Self Funding
Next Survey	TBC	Next Survey	June 2015

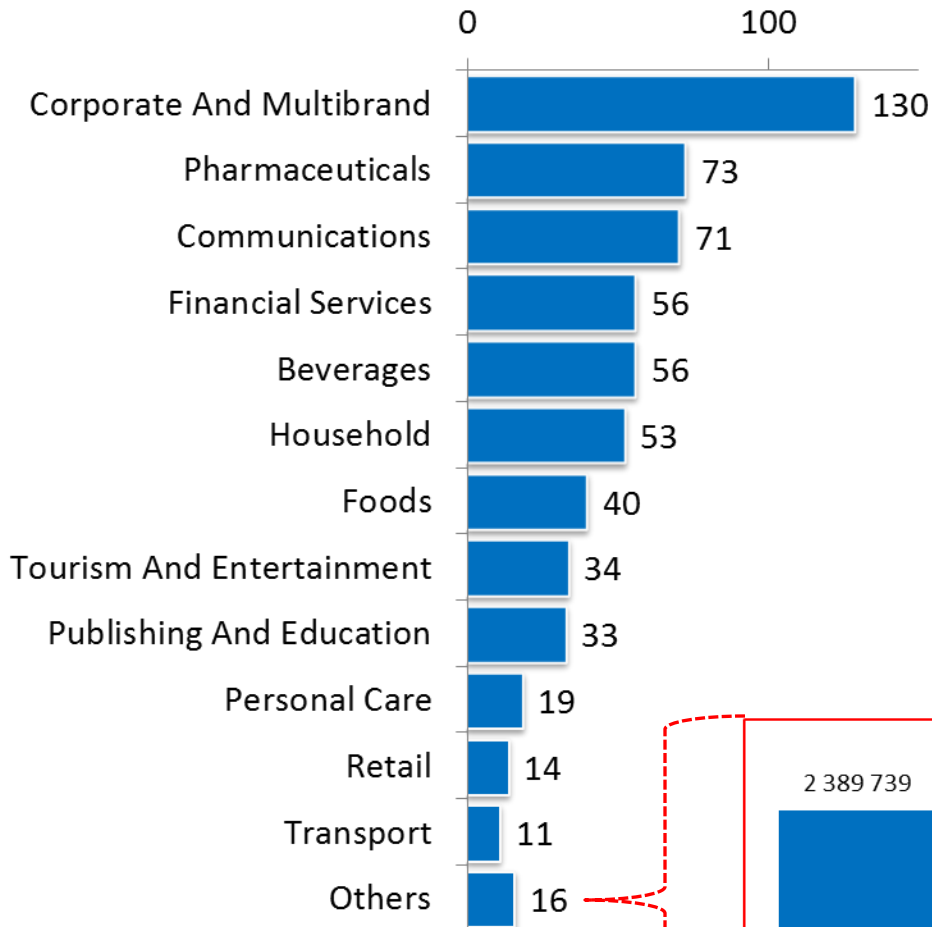
Ghana Media Activities



Source: 2009 Establishment study

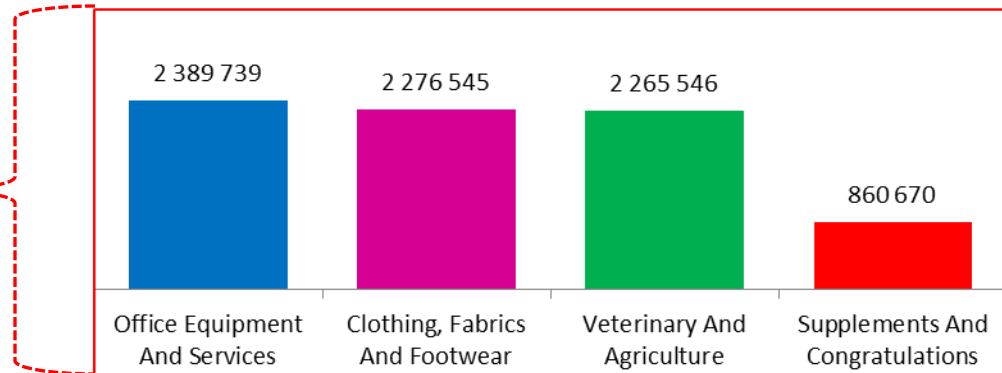
MEDIA OVERVIEW/ UPDATE

Ghana advertising Industry spends by sectors
Jan – Dec 2014 GHC Millions

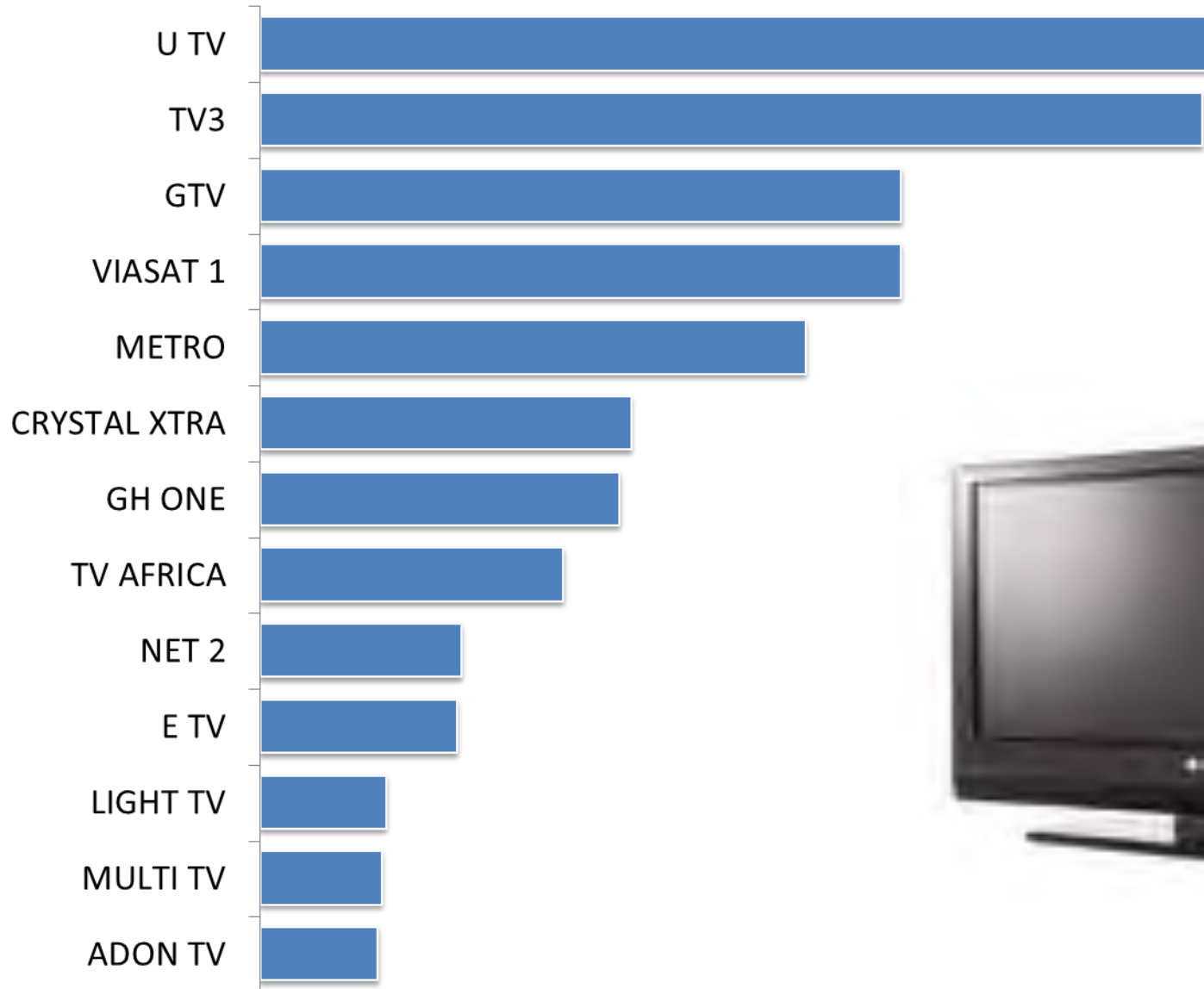


GHC 403,266,142

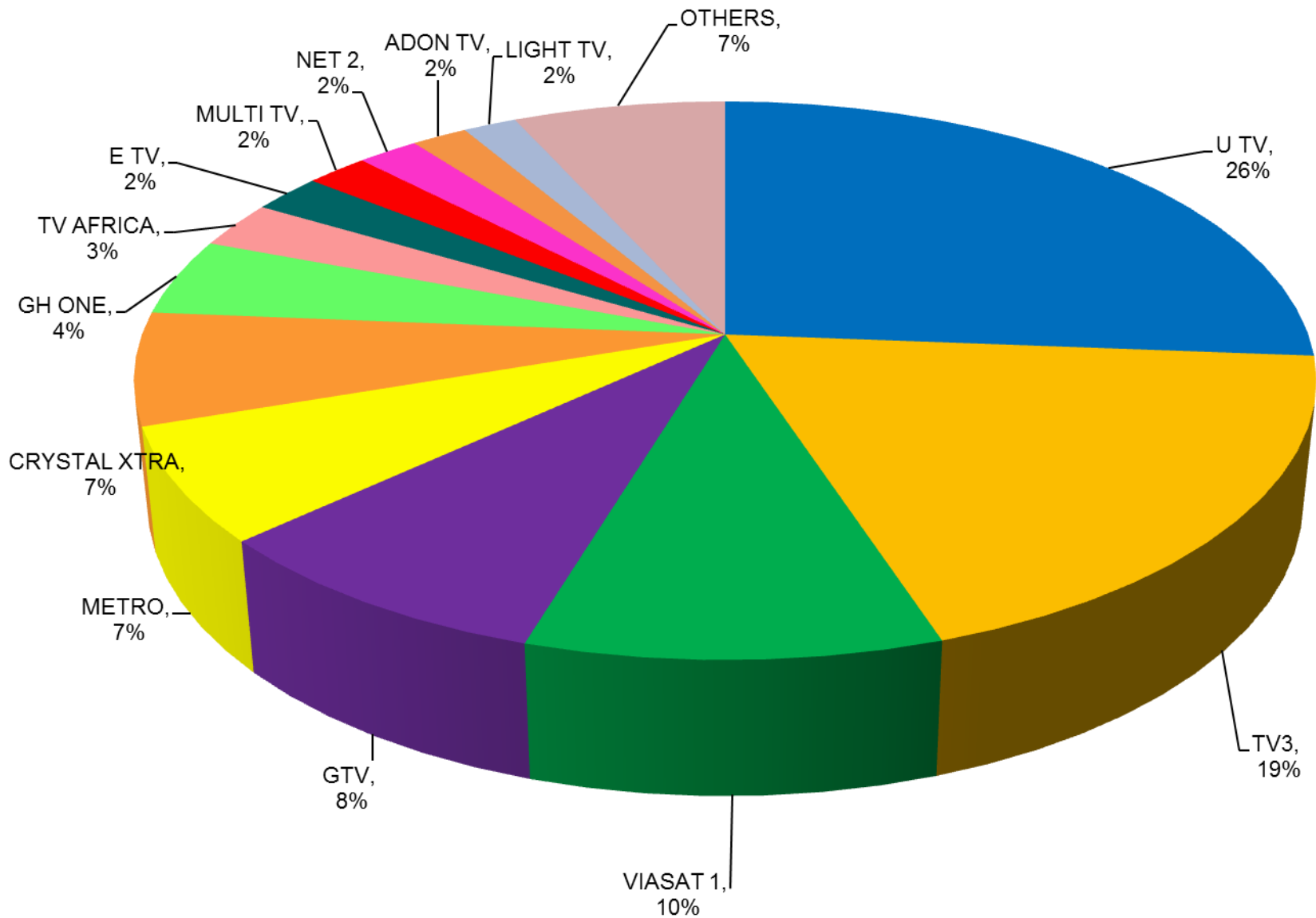
- ✓ Corporate & Multibrand main drivers are Multi sponsorships and Churches.
- ✓ Communication drivers are Mobile service providers



2014 OCT-DEC TV REACH - P7D



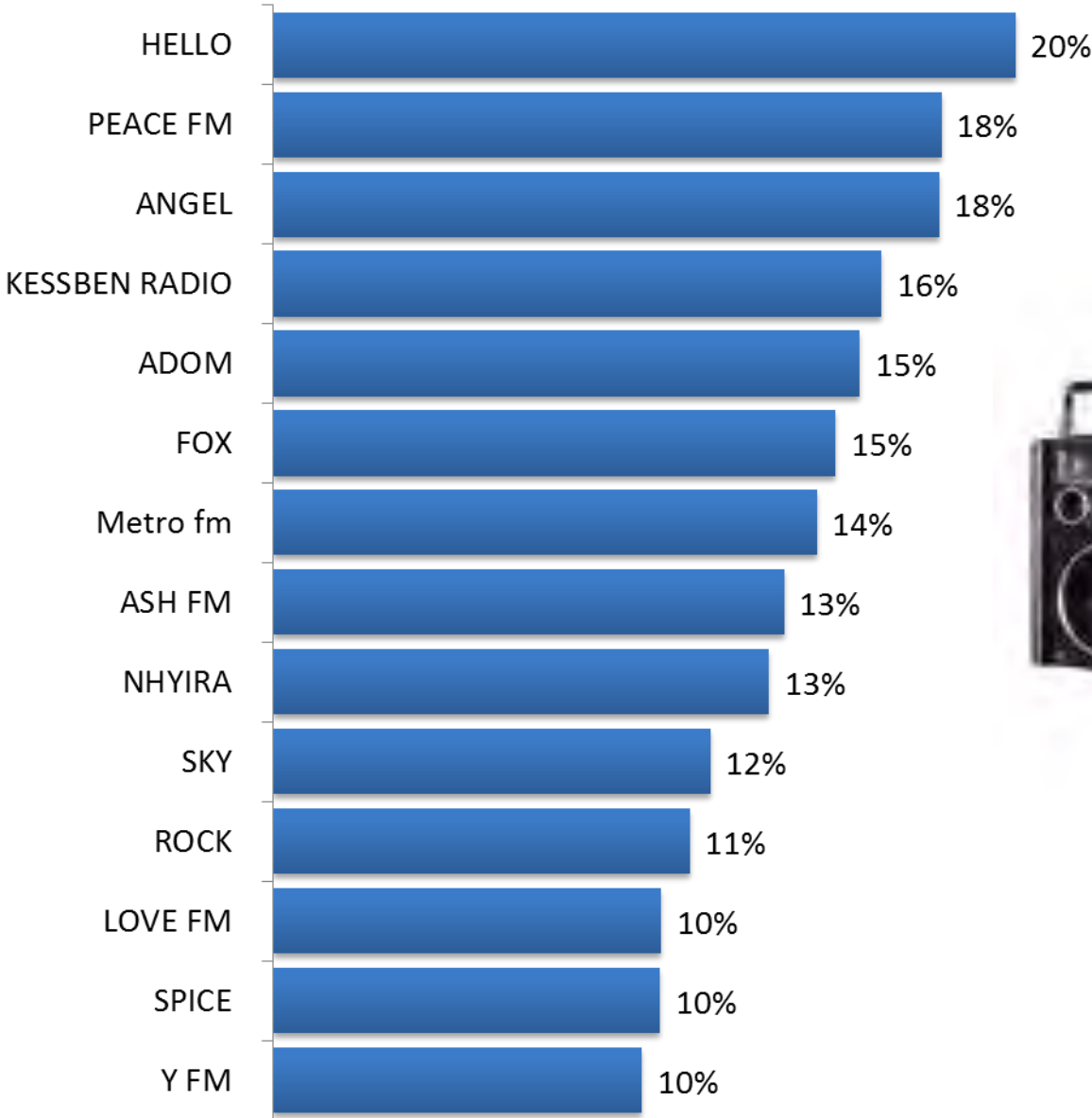
2014 OCT-DEC TV SHARE - P7D



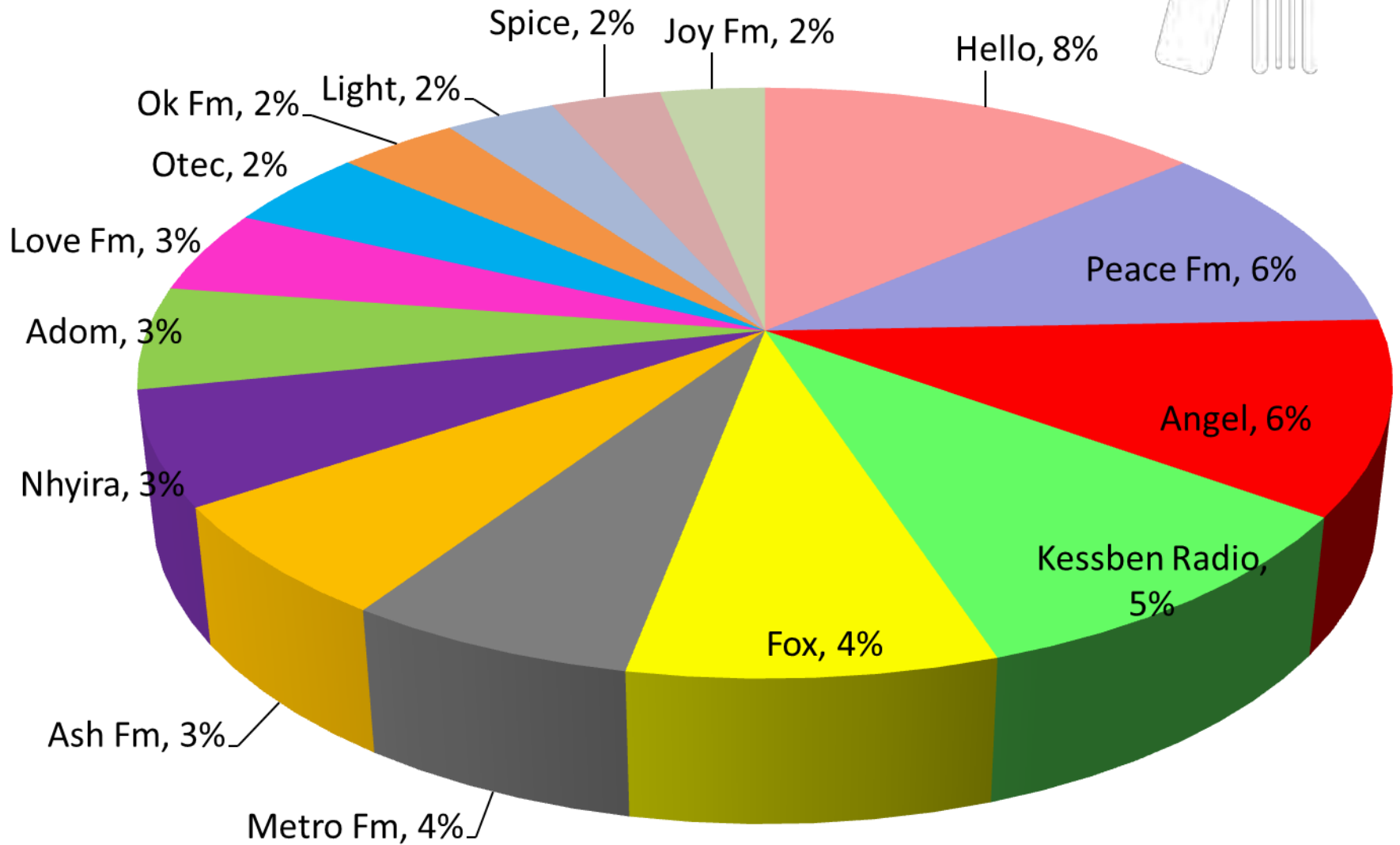
2014 OCT-DEC RADIO REACH – P7D



BASE: 3.2M PAST 7 DAYS RADIO LISTENERS



2014 OCT-DEC RADIO SHARE – P7D





Kenya



Information Supplied by: Ipsos



Country Overview

Basic Country Statistics

% or No:

Population	45,010,056 (July 2014 est.) - <i>Source: Central Intelligence Agency</i>
GDP growth rate in 2013	5.3% (2014.) <i>Source: - Kenya National Bureau of Statistics</i>
% living below poverty line	34-42% - <i>Source: Kenya Economic update, World bank June 2013</i>
Literacy in Adults over 15yrs	78% - <i>Source: Central Intelligence Agency</i>
No. of Languages	English (official), Kiswahili (official), numerous indigenous languages
Administrative Divisions	47 Counties
No. of Religions	Protestant 47.4%, Roman Catholic 23.3%, Muslim 11.1%, indigenous beliefs 1.6%, other 1.7%
Local Currency	Kenyan Shilling
Exchange Rate (US\$)	USD 1 = KES 96.67

Note: a large majority of Kenyans are Christian, but estimates for the percentage of the population that adheres to Islam or indigenous beliefs vary widely

Current Political Environment

Current President	President Uhuru Kenyatta
Ruling Party	TNA(The National Alliance)

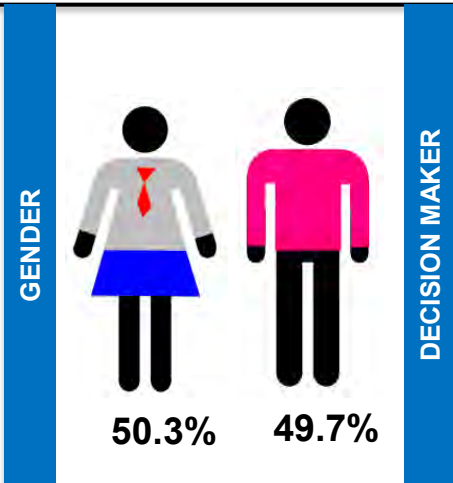
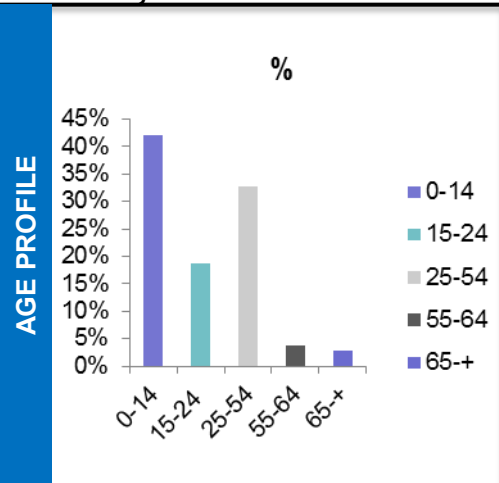
Media Statistics

Television Ownership	28% of the Households (Kenya 2009 Population & Housing Census)
Radio Ownership	74% of the Households (Kenya 2009 Population & Housing Census)
No. of Landlines	NA
Mobile Phone Penetration	NA

Legislation changes 2014:

TOTAL UNIVERSE SIZE
16731,000

COUNTRY STATS



LANGUAGE

Mean monthly expenditure

- Per household Kshs. 6,343
- Per rural household Kshs. 4,101
- Per urban household Kshs. 10, 826
- For male headed rural households Kshs. 4,620
- For female- headed rural households Kshs. 2,986

(Labor force survey)

Literacy rate, adult total
(% of people ages 15 and above)

72.2%

Percentage of the population age 15 and above who can, with understanding, read and write a short, simple statement on their everyday life and make simple arithmetical calculations – **World Bank**

BANKING

15,072,922 number of bank customer deposit accounts as at 30th September 2012- Central Bank of Kenya

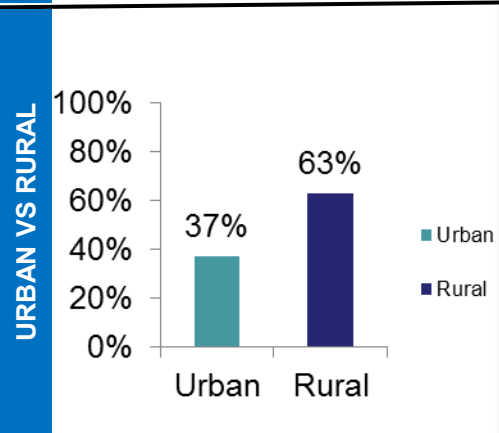
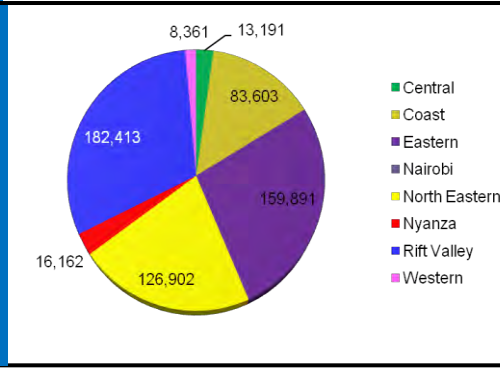
CHILDREN

Average of 4.6 children per woman in 2009

28.27 births /1,000 population (2014 est.)

LIFESTAGE

N/A



EDUCATION

Highest level of education ever attained

Never attended: 18.6%
Pre-primary: 6.6%
Primary: 51.1%
Secondary: 17.4%
Tertiary: 3.4%
University: 1.5%
Youth Polytechnic: 0.5%
Basic literacy: 0.2%
Madarassa: 0.7%

KBS 2009 CENSUS population aged 3+

EMPLOYMENT

Employed : 48.6%
Seeking work/No work available: 6.7%
Economically inactive: 39.5%
Unclassified: 5.2%

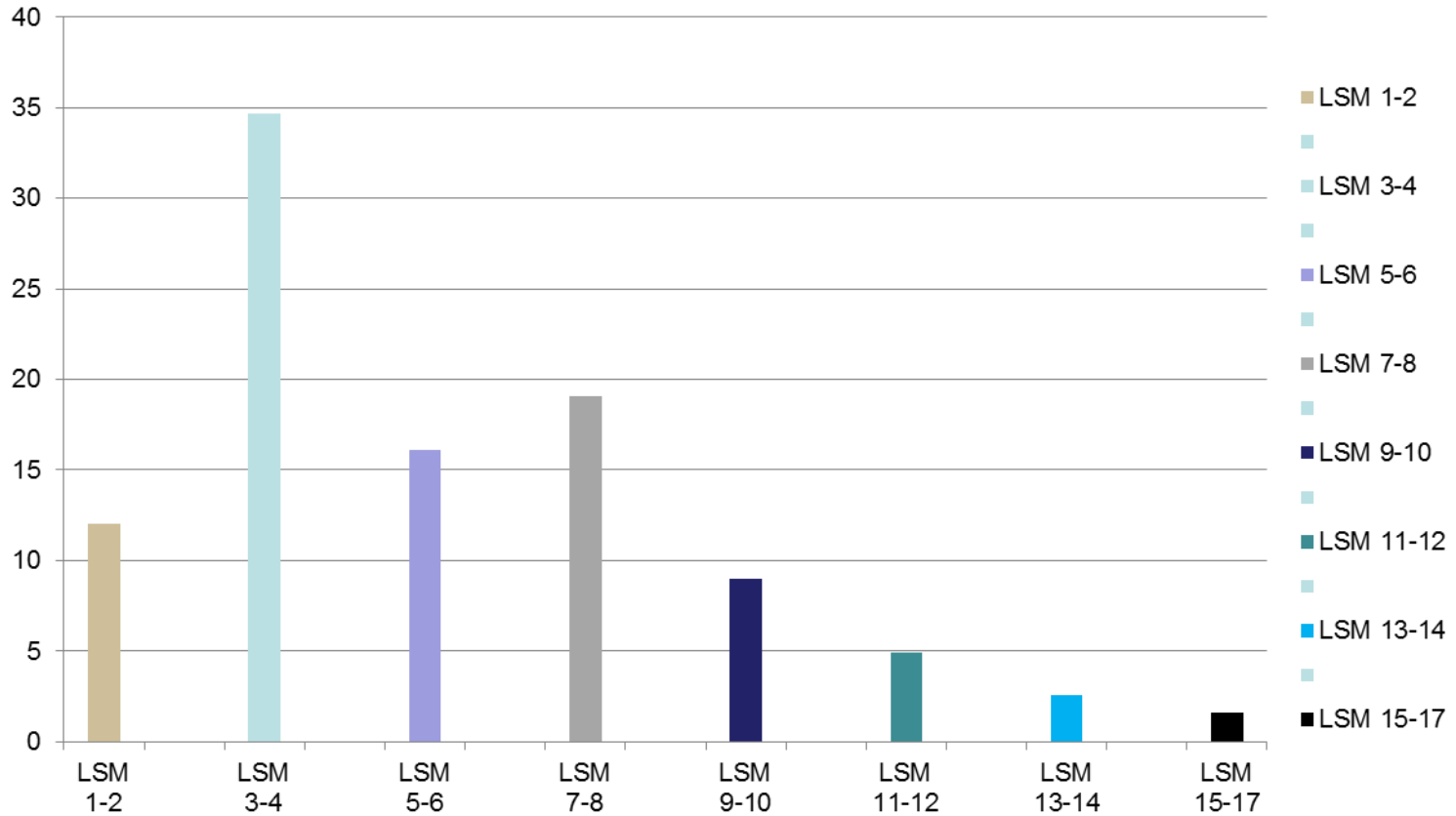
KBS 2009 CENSUS population aged 5+

MARITAL STATUS

N/A

LSM BREAK DOWN

Percent (%)



Q4 2014 Survey

Country Research Company

The Kenya Audience Research Foundation (KARF) through Ipsos Kenya conducts a quarterly audience measurement tracking survey.

Cost for purchase of data per wave = USD 3,950

This includes the following:

- Radio, Television and Print Diaries
- AMPS
- 1 customised analysis for one profile



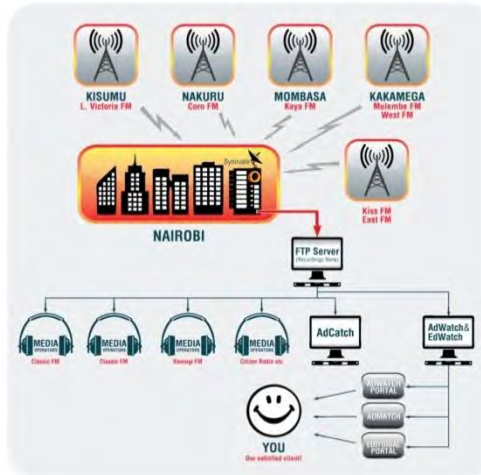
RADIO CITIZEN



Country Research Company

- Ipsos Kenya is the leading media monitoring company in Kenya, having set up in 1984. Radio, Print and Television media are monitored to capture advertising and editorial content .
- 2.5% fee on advertising budget, Ipsos advertisement verification service is a fast, reliable and independent tracking service
- Monitoring is proprietary
- Compliance Country Rate*
 - Advertising Content = 99.92%
 - Editorial Content = 99.76%

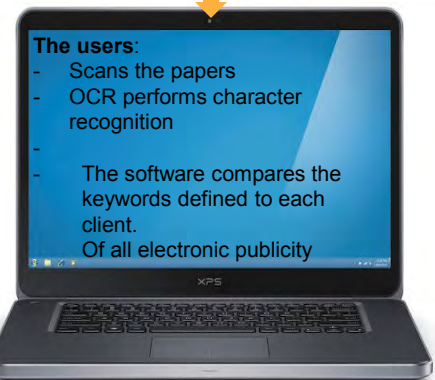
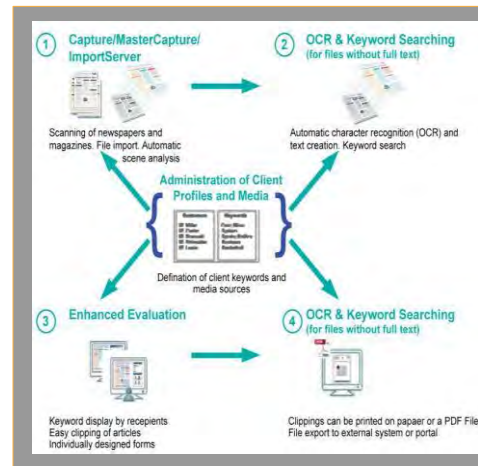
Monitoring process: Electronic



Electronic Monitoring Process

The broadcasts of each regional station are recorded and transmitted to the head office. Audio matching technology is then used to monitor media content.

Process: Editorial monitoring



Controlling industries bodies

N/A

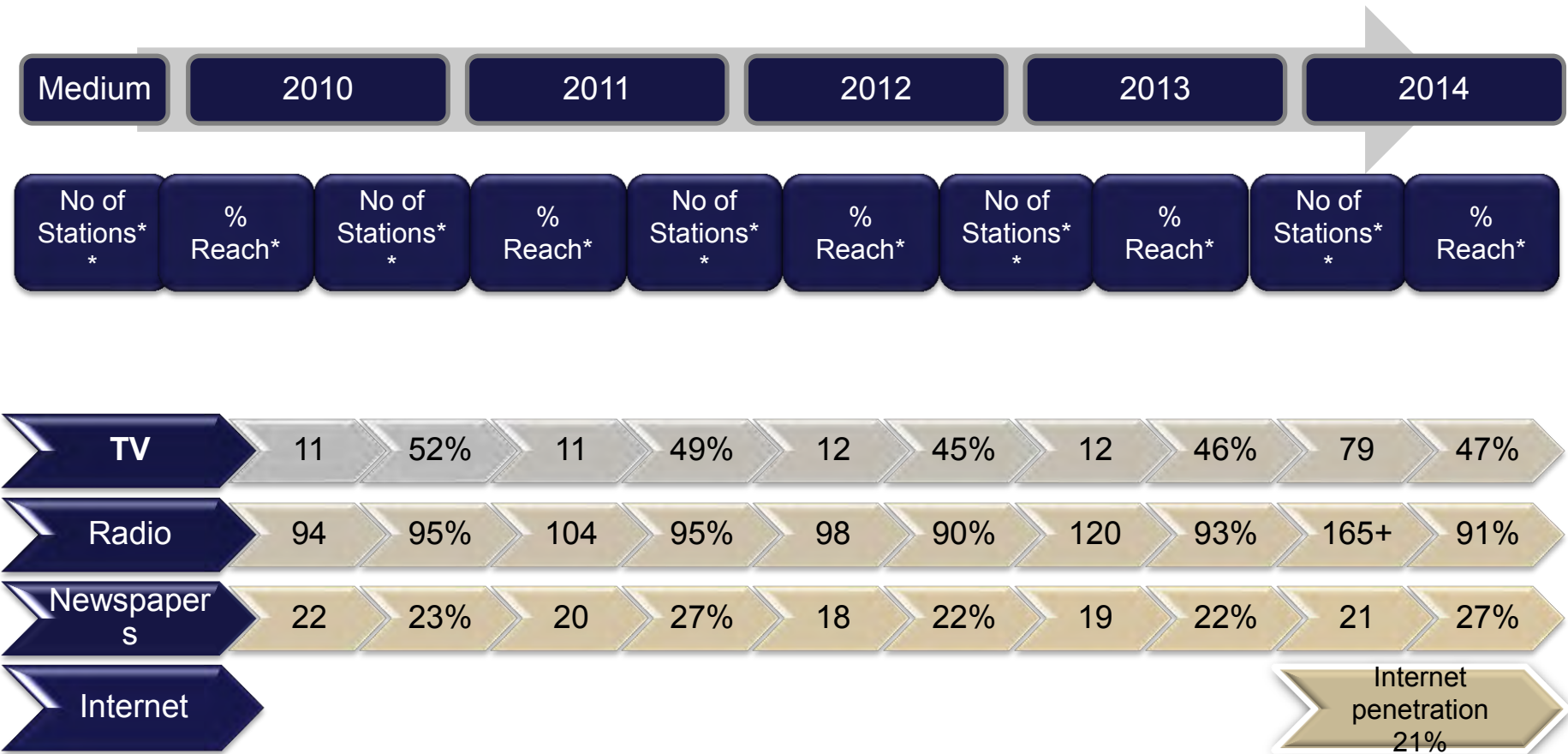
Country Research

Establishment Survey 2015

Q4 2014

Last Survey Released	End February to full March 2015	Last Survey Released	End February to full March 2015
Type of Interview Sample Size	4000+, 12 years +	Type of Interview Sample Size	4000+, 12 years+
Scope of Survey (Universe)	Age, Gender, LSM, Topography, Rural/Urban	Scope of Survey (Universe)	Age, Gender, LSM, Topography, Rural/Urban
Media Covered Brands covered	Print / Television / radio, Internet Usage	Media Covered Brands covered	Print / Television / radio, Internet Usage
Survey Funding Cost of Survey	Joint Industry Committee	Survey Funding Cost of Survey	Joint Industry Committee
Next Survey	2016 (KAMPS)	Next Survey	2016 (Media diaries)
Sample Size & Methodology	4350 Nationally representative Face to face interviews at household level Interviewer managed CAPI devices with GPS tracking capability	Sample Size & Methodology	4350 Nationally representative Face to face interviews at household level Interviewer managed CAPI devices with GPS tracking capability

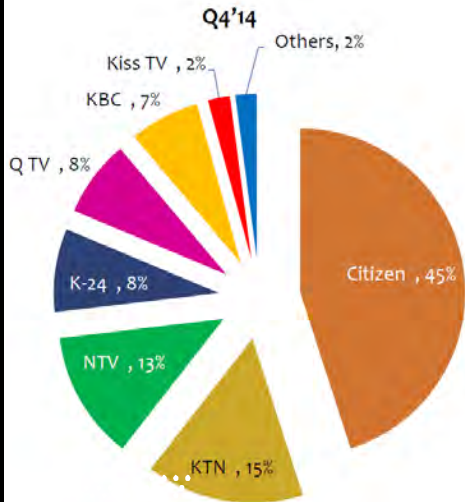
Media Overview - Channels & Media Reach



Television consumption



Share of time spent on TV



TOP CHANNELS Q4,14

Citizen: 86%

KTN: 57%

NTV: 52%

K-24: 36%

QTV: 34%

KBC: 32%

Base: Past 7 day TV viewers = 10.89 million (Persons ages 15yr+)



TOP STATIONS



Weekly reach: Total survey area

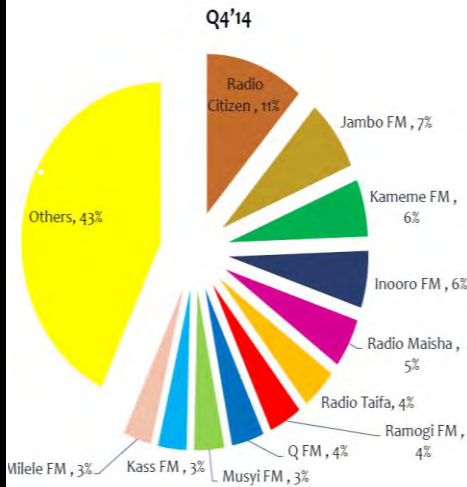
	Q1'14	Q2'14	Q3'14	Q4'14
Citizen	87%	88%	86%	86%
KTN	52%	60%	53%	57%
NTV	59%	62%	52%	52%
K-24	29%	30%	35%	36%
Q TV	29%	36%	36%	34%
KBC	30%	33%	38%	32%
Kiss TV	11%	13%	11%	12%
GBS	4%	5%	3%	4%
Family TV	4%	4%	4%	3%
UTV	2%	3%	2%	3%

Base: Past 7 Day TV Viewers = 10.89 Million (Persons Ages 15yr +)

Radio Consumption



Share of time spent on radio



TOP Radio Stations Q4,14

- Radio citizen: 40%
- Jambo FM: 28%
- Radio Maisha: 21%
- Radio Taifa: 19%
- Q FM: 17%
- Milele FM: 16%
- Inooro FM: 14%
- Kameme FM: 14%
- Kiss FM: 12%



TOP STATIONS

RADIO

Weekly reach: Total survey area

	Q1'14	Q2'14	Q3'14	Q4'14
Radio Citizen	42%	43%	42%	40%
Jambo FM	24%	28%	27%	28%
Radio Maisha	13%	16%	17%	21%
Radio Taifa	19%	20%	21%	19%
Q FM	18%	19%	17%	17%
Milele FM	17%	19%	18%	16%
Inooro FM	15%	15%	13%	14%
Kameme FM	14%	14%	14%	14%
Kiss FM	12%	12%	12%	12%

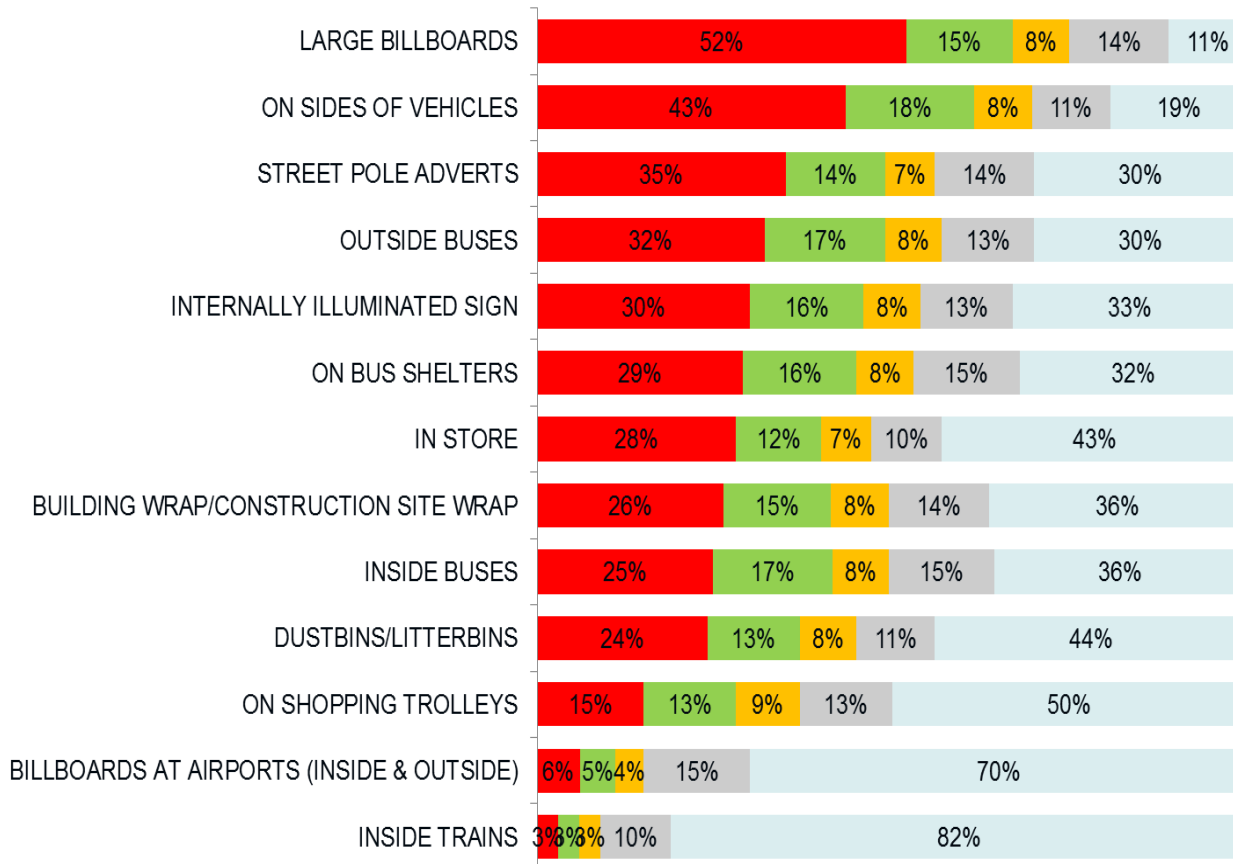
Base: Past 7 Day Radio Listeners = 21 Million (Persons Ages 15yr +)



Ooh Consumption

Outdoor: Incidence of Access

■ PAST 7 DAYS
 ■ PAST 4 WEEK
 ■ PAST 3 MONTHS
 ■ LONG AGO
 ■ NOT SEEN



Base: 22 Million (Persons Ages 15yr +)



Mobile/digital consumption



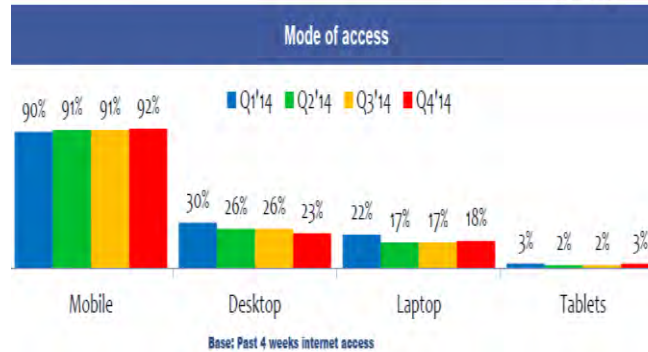
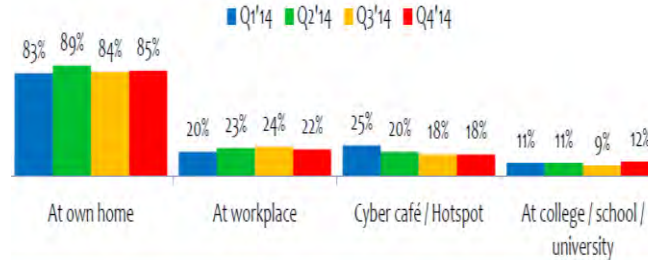
**Accessed Internet
P7D Q3'13: 16%**

Base: 4.2M

Internet activities Q4'13

- News and current affairs: 30%
- Email: 44%
- Social Networking: 66%**
- Entertainment games and music: 27%
- Research: 18%
- General surfing: 16%
- Job search: 14%
- Reading online newspaper: 13%
- Academic purposes/School: 10%
- Video entertainment/ Streaming: 9%
- Reading books: 8%

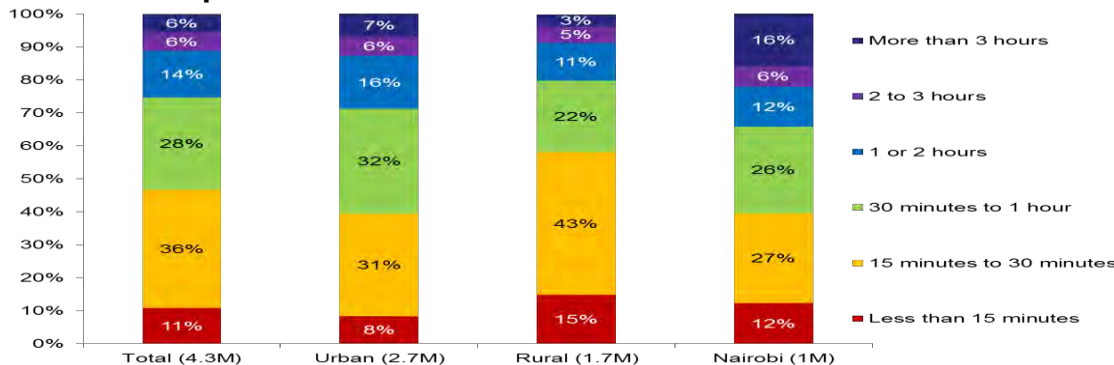
INTERNET ACTIVITY PLACE AND MODE OF ACCESS



MOBILE

DIGITAL

Time spent on the internet session



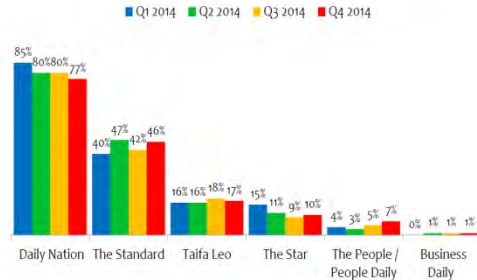
Base: 4.2 Million
P4W Internet Users



Print Consumption

PRINT / PRESS

TOP TITLES



Base: 6.0 Million (Past 7 days Newspaper Readers)

- Daily nation
- The Standard
- Taifa Leo
- The Star
- People/People Daily
- Business daily



Weekly newspaper: Incidence of readership

	Q1'14	Q2'14	Q3'14	Q4'14
Sunday Nation	61%	62%	57%	58%
Saturday Nation	46%	36%	35%	37%
Sunday Standard	20%	19%	17%	17%
Saturday Standard	17%	18%	15%	14%
Taifa Jumapili	5%	6%	8%	8%
Nairobiian	7%	4%	7%	7%
Taifa Jumamosi	4%	4%	4%	6%
Weekend Star (Saturday & Sunday)	4%	4%	4%	5%
Mwanaspoti	3%	3%	3%	4%
Sunday People	1%	1%	2%	3%
Saturday People	2%	1%	1%	2%
Citizen Express (Weekly)	0%	0%	0%	1%

Base: 6.0 Million (Past 7 days Newspaper Readers)

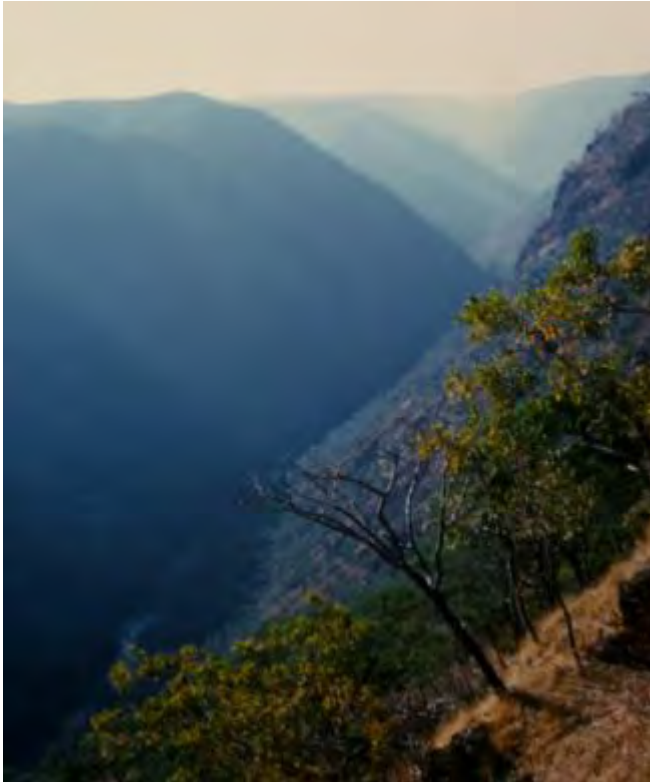




MAURITIUS

Information Supplied by:
Touch Point Ltd

Country Overview



Legislation changes 2014:

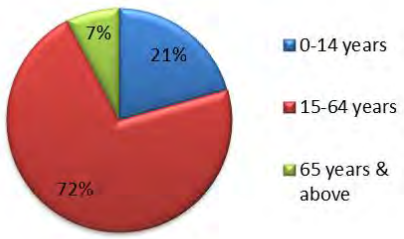
- Maternity leave extended from 12 to 14 weeks

Basic Country Statistics	
	% or No:
Population	1,258,653 (2013 est)
Urbanisation vs Rural	40% vs 60%
GDP growth rate in 2014	4.10% (Q1 2015)
% living below poverty line	8.7% (Mar 2013)
Literacy in Adults over 15yrs	89.8%
% of population below 15yrs	21.9%
Administrative Division	9 in all - Port Louis & others
No. of Television Sets	99%
No. of Radio Sets	99%
No. of Languages	Creole (84%), Bhojpuri (5.3%), French (3.6%) & Other 9.1% (2011)
No. of Religions	Hindu (48%) , Roman Catholic
Local Currency	Mauritian Rupees
Exchange Rate (US\$)	1 USD = 34 MUR (9 Jun 15)
Latest Censor (Year)	2011
Current Political Environment	
Current President	Ameenah Gurib-Fakim (since 5
Ruling Party	L'Alliance Lepep
No. Of Cell Phones	1,132,788 (2013)
No. Of Landlines	877,557(2013)

COUNTRY STATS

TOTAL UNIVERSE SIZE
1,258,673

AGE PROFILE



GENDER



DECISION MAKER

Less than MUR 10,000 = 6%
 MUR 10,000 – 19,999 = 23%
 MUR 20,000 – 29,999 = 19%
 MUR 30,000 – 39,999 = 10%
 MUR 40,000 – 49,999 = 6%
 MUR 50,000+ = 7%
 Refuse/Don't Know = 29%

LANGUAGE

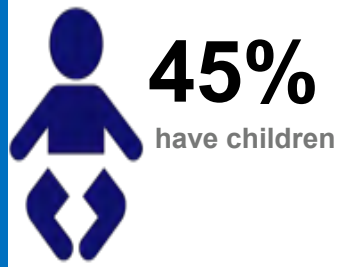


Most often spoken at home

Creole: 84%
 Bhojpuri: 5.3%
 French only: 3.6%
 Other: 7.1%

CHILDREN

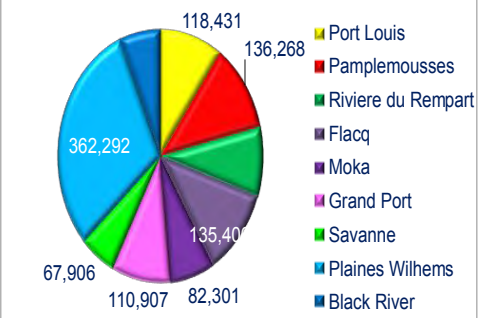
CHILDREN



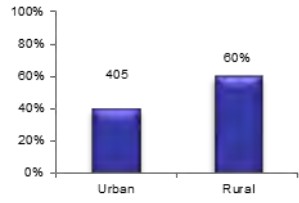
LIFESTAGE

1 parent with unmarried children: 13.6%
 Couple with unmarried children: 64.7%
 Couple without children: 13.1%
 Single member household: 10.1%
 Other: 9.5%

AREA BREAKDOWN



URBAN VS RURAL



EDUCATION



Year: 2014 registration
 Primary: 103,686
 Secondary: 114,239
 Tertiary: 10,463

EMPLOYMENT



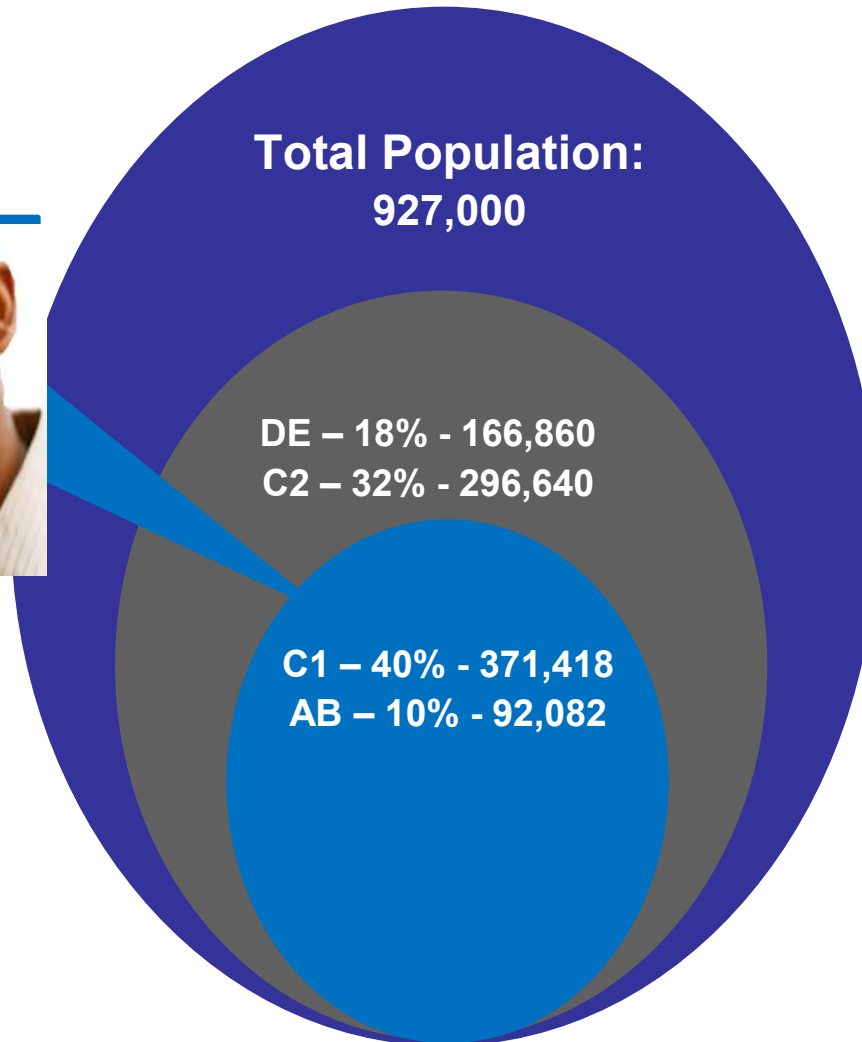
Work Full Time: 30%
 Student: 17%
 Unemployed: 28%
 Self employed: 9%
 Retired: 12%

MARITAL STATUS



Singles: 27.4%
 Married/In a union: 59.8%
 Widowed: 8.2%
 Divorced/Separated: 4.2%
 Unmarried parent: 0.4%

SEC BREAKDOWN



AB

'High class', mainly those working as legislators, senior and officials, managers and professionals.

C1

Upper middle class, mainly technicians and associate professionals, clerks, service workers and shop sales workers

C2

'Lower middle class' : skilled agricultural and fishery workers, craft and related trades workers.

DE

'Lower class' : Plant and machine operators and assemblers and those who are working in elementary occupations.

Country Research Company

Media Monitoring

1. Company: DCDM Research

Cost: MUR 30,000 + vat per month (depends on sector)

2. Company: TNS Analysis

Cost: MUR 30,000 + vat per month (depends on sector)

Share of voice, Brand monitor and Ad impact reports

DCDM

TNS Analysis

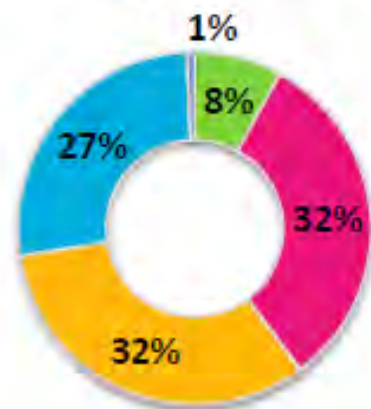
Last Survey Released	2015 Q1	Last Survey Released	2015 Q1
Type of Interview	Adults age 13+	Type of Interview	Adults, aged 15+
Scope of Survey (Universe – Cities)	Mauritius (across the island)	Scope of Survey (Universe)	Mauritius (across the island)
Media Covered Brands covered	Print / Broadcast / outdoor/ Internet/ Cinema Attendance	Media Covered Brands covered	Print / Internet / outdoor/ Cinema Attendance
Survey Funding Cost of Survey	Self Funding	Survey Funding Cost of Survey	Self Funding
Next Survey	2015 Q2	Next Survey	2015 Q2
Sample Size & Methodology	800 phone interviews per month	Sample Size & Methodology	250 face to face interviews per month

MEDIA OVERVIEW - CHANNELS & MEDIA REACH

Medium	2011	2012	2013	2014
	No of Stations	No of Stations	No of Stations	No of Stations % Reach
TV	7	7	7	15 64.3%
Radio	8	8	9	9 94.3%
Newspapers	11	11	12	12 86.3%
Magazines	7	7	7	9 14.4%
Cinema Screens	5	5	5	6 1.8%
Outdoor Companies	6	6	6	8 68.3%
Online	5	5	5	6 50.0%

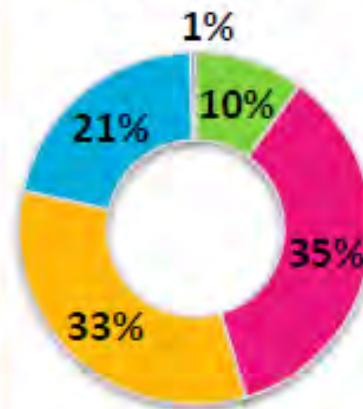
Media Buying* – Total Market August 2014

August 2014

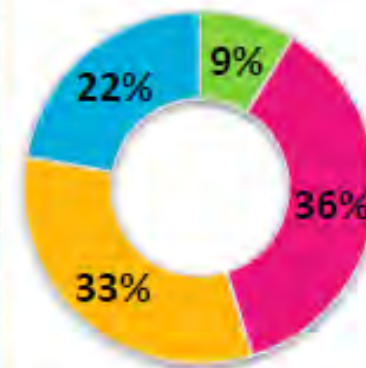


- TV
- PRESS & MAGAZINES
- RADIO
- OUTDOOR
- INTERNET

August 2013



August 2012



Media	Year	Month		2013			2012		
	2014	August		August			August		
	Freq	Rs	Rs %	Freq	Rs	Rs %	Freq	Rs	Rs %
TV	1495	10,904,900	8	2019	15,057,470	10	1782	12,220,455	9
PRESS	2282	43,191,462	32	3522	53,056,164	35	3630	50,460,661	36
RADIO	19832	44,444,984	33	22753	49,569,155	33	21288	45,131,398	33
OUTDOOR	6958	36,376,107	27	6040	31,689,582	21	5993	30,784,858	22
INTERNET	163	976,000	1	116	688,000	0	**	**	**
Totals	30730	135,893,453	100	34450	150,060,371	100	32693	138,597,372	100

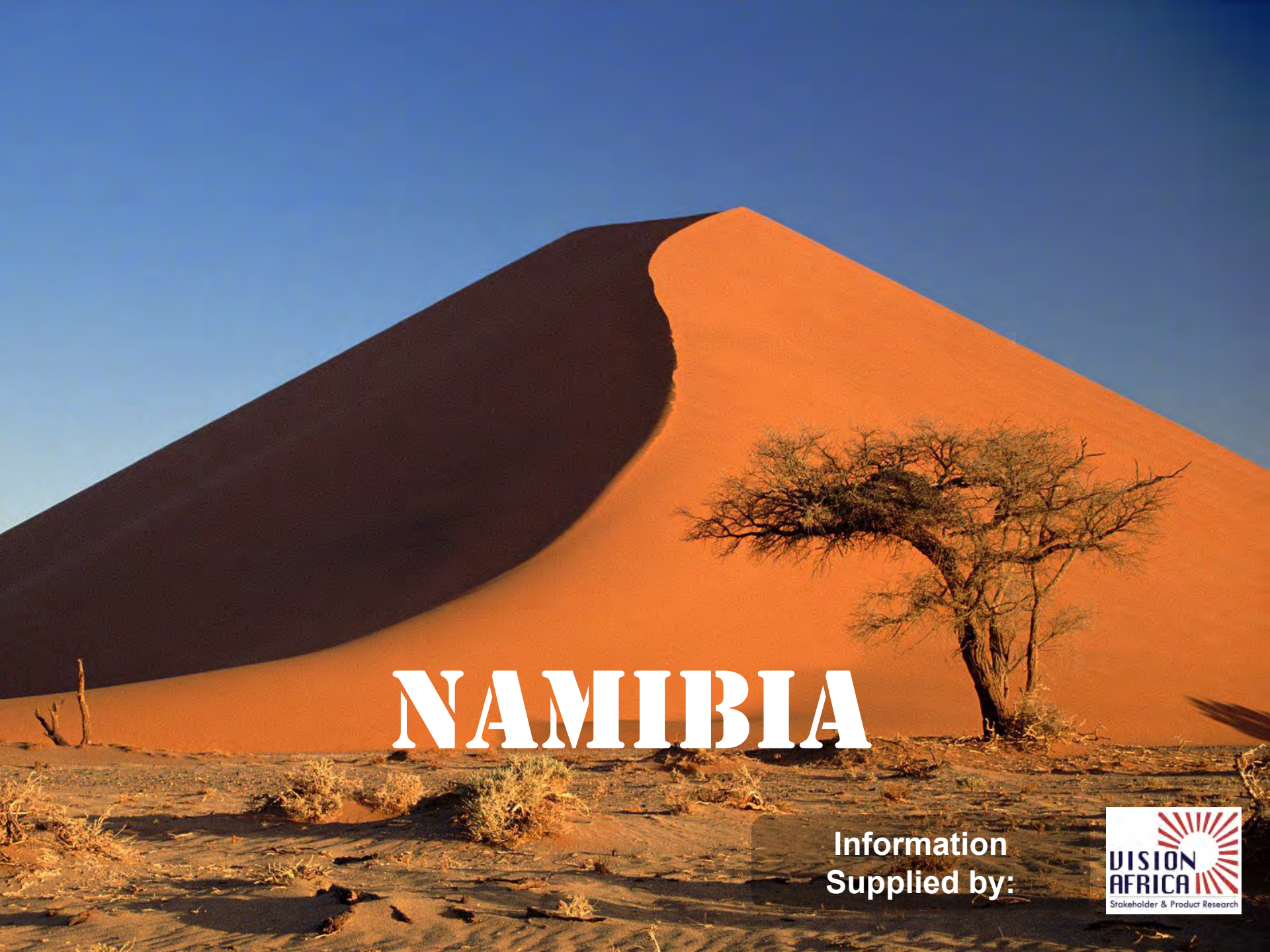
*Excluding phone games & services, non commercial ads and sponsoring

** Not monitored

the top 5

August 2014

	▼ August 2012	▼ August 2013	▼ July 2014	▼ August 2014
1				
2				
3				
4				
5				



NAMIBIA

Information
Supplied by:





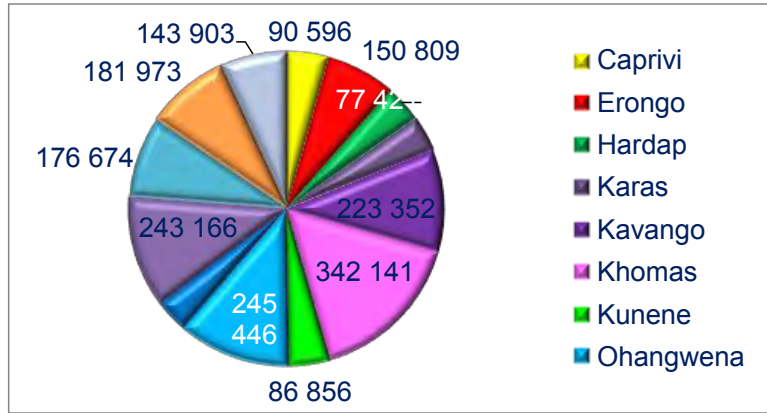
Country Overview



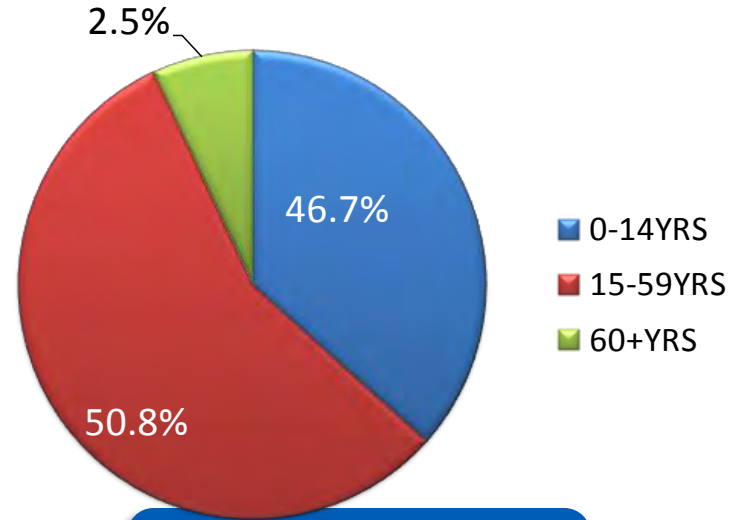
	% or No:
Population	2 113 077
Urbanisation vs Rural	43:57:00
GDP growth 2010 onwards	6.2%; -2.3% (2011); 2.5% (2012); 4.3% (2013)
% living below poverty line	29%
Literacy in Adults over 15yrs	89.0%
% of population below 15yrs	37.0%
Administrative Division	13 Regions (2013)
No. of Households with TV Sets	490227
No. of Radio Listeners	847643
No. of Languages	11
No. of Religions	Mainly Christian
Local Currency	Namibia Dollar
Exchange Rate (US\$)	10.7
Current Political Environment	
Current President	Hifikepunye Pohamba
Ruling Party	SWAPO
No. of Pop with own cellphone	1 149 992
No. Of Landlines	180 110
Internet (Service Providers)	6

Legislation changes 2013:
No notable changes to report

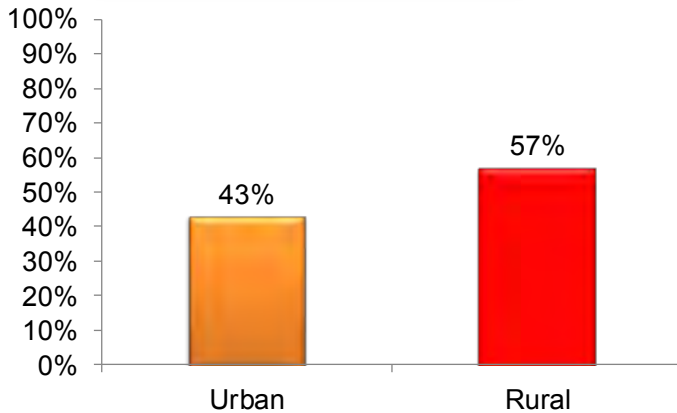
Country Statistics



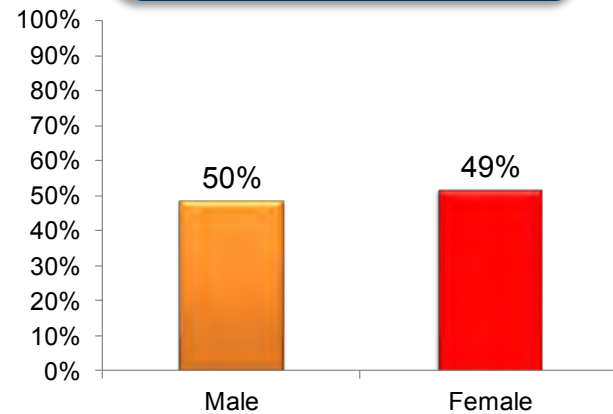
AREA



AGE

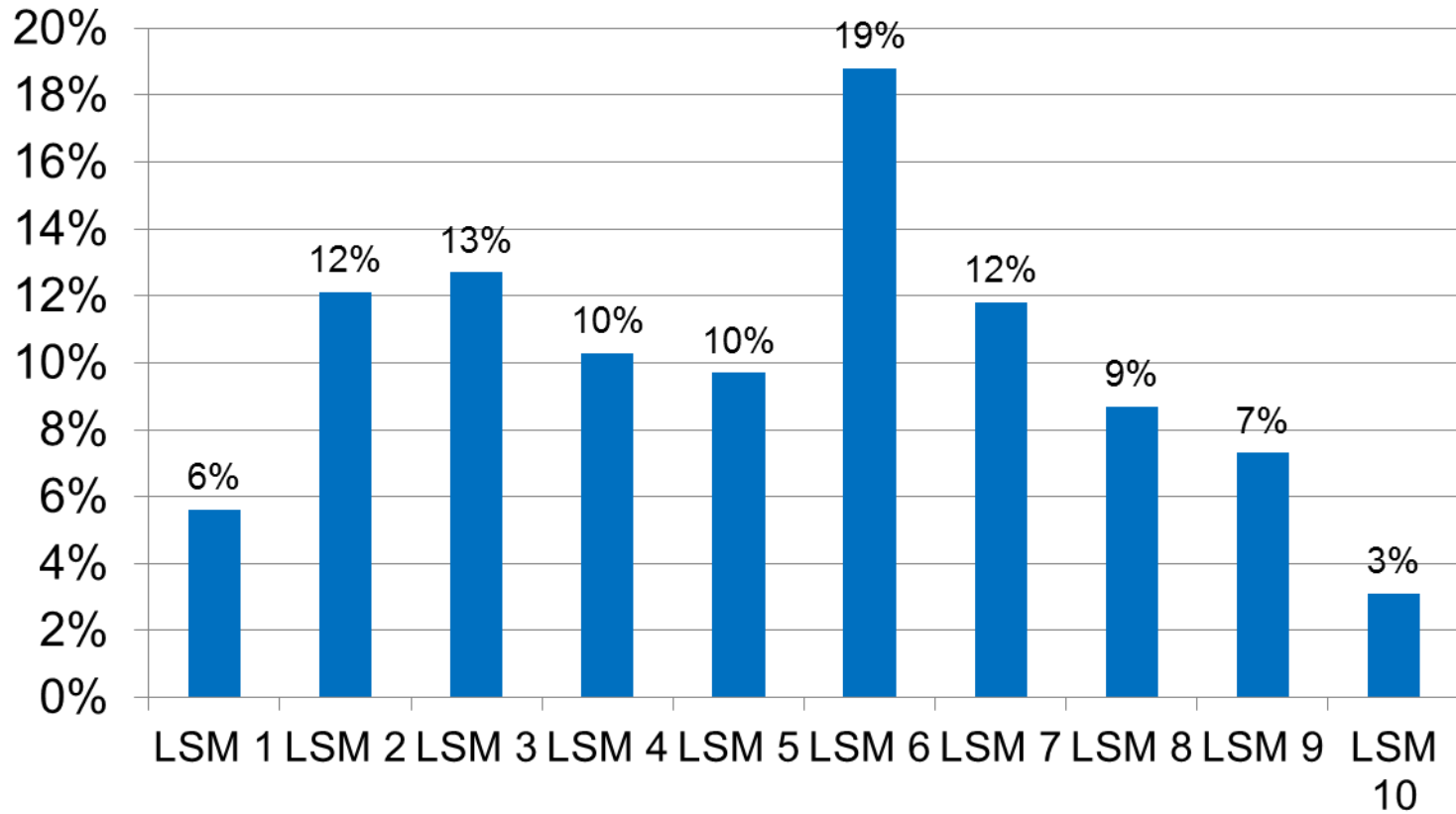


RURAL / URBAN



GENDER

Country Statistics cont...



LSM

Country Research Company



Vision Africa is the leading private market research organization in Namibia. Established in 1999, the company has a well-established, professional team and comprehensive field force in Namibia. We also boast a network of research personnel in Angola, Botswana, Zambia and Zimbabwe.

Our product includes Media Consumption and awareness, TV and Radio diary feedback as well as household product consumption information.

MediaMetrics **TUMetrics**
RadioMetrics **ConsuMetrics**

Country Research

MediaMetrics

Media Diaries

Last Survey Released	2013	Last Survey Released	2013
Type of Interview Sample Size	2400 Adults age 15+	Type of Interview Sample Size	2400 Adults age 15+
Scope of Survey (Universe)	Urban and Rural	Scope of Survey (Universe)	Urban and Rural
Media Covered Brands covered	Print / Broadcast / Outdoor/ Internet & Cell phone Usage/ Financial/ Sport/ Music	Media Covered Brands covered	Radio & TV diaries
Survey Funding Cost of Survey	Self Funding	Survey Funding Cost of Survey	Self Funding
Next Survey	July 2014	Next Survey	July 2014

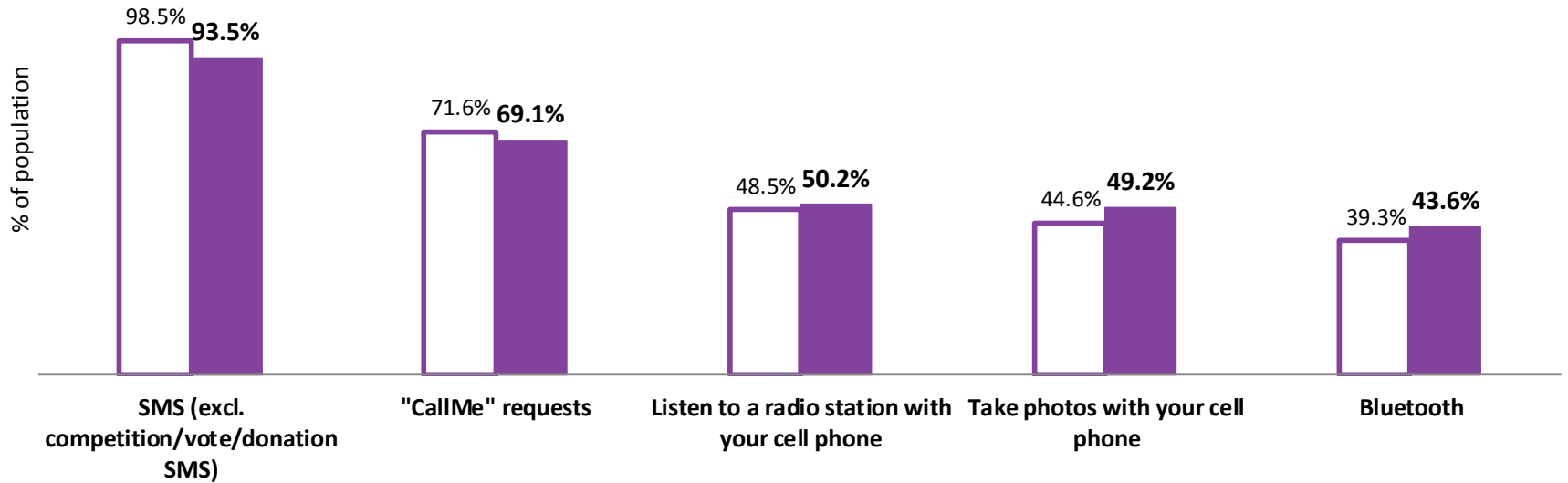


MEDIA OVERVIEW/ CELLULAR



Cell phone functionality and activities: 2012-2013

Results based on sample of 2171 (2013)
Total number of cell phone owners 1149992 (2013)



Year	Pop.	Position
2009		
2010		
2011	1 032 476	1
2012	1 163 210	➔ 1
2013	1 075 589	➔ 1

Year	Pop.	Position
2009		
2010		
2011		
2012	845 190	2
2013	794 728	➔ 2

Year	Pop.	Position
2009		
2010		
2011		
2012	572 758	3
2013	576 986	➔ 3

Year	Pop.	Position
2009		
2010		
2011	1 397	9
2012	526 467	⬆ 4
2013	566 164	➔ 4

Year	Pop.	Position
2009		
2010		
2011	326 228	2
2012	464 061	⬇ 5
2013	501 649	➔ 5

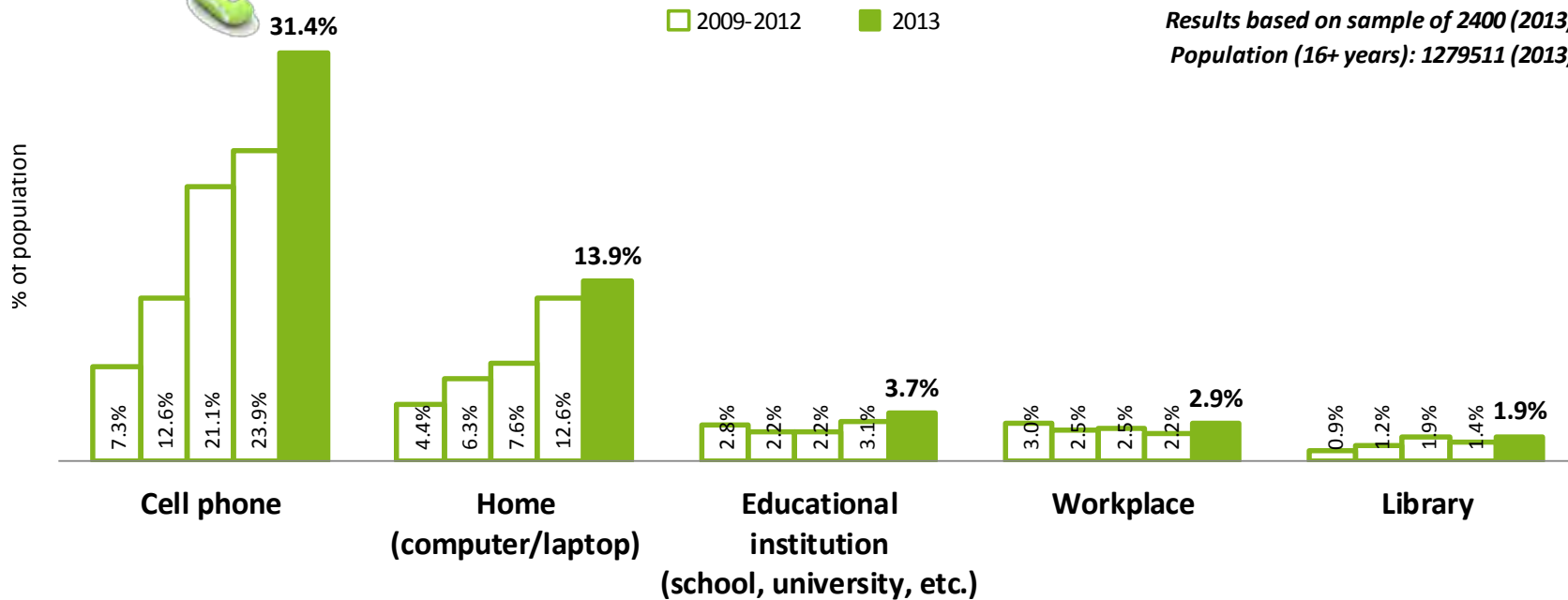


MEDIA OVERVIEW/ ONLINE



Internet access trends - where accessed from: 2009-2013

Results based on sample of 2400 (2013)
Population (16+ years): 1279511 (2013)



Year	Pop.	Position
2009	87 977	1
2010	154 642	➔ 1
2011	262 845	➔ 1
2012	302 125	➔ 1
2013	402 316	➔ 1

Year	Pop.	Position
2009	52 883	2
2010	77 684	➔ 2
2011	94 768	➔ 2
2012	158 626	➔ 2
2013	177 258	➔ 2

Year	Pop.	Position
2009	34 252	4
2010	27 475	➔ 4
2011	27 907	➔ 4
2012	38 700	⬆ 3
2013	47 262	➔ 3

Year	Pop.	Position
2009	35 833	3
2010	30 376	➔ 3
2011	31 684	➔ 3
2012	27 881	⬇ 4
2013	37 594	➔ 4

Year	Pop.	Position
2009	10 804	6
2010	14 517	➔ 6
2011	24 119	➔ 6
2012	18 182	➔ 6
2013	24 918	⬆ 5



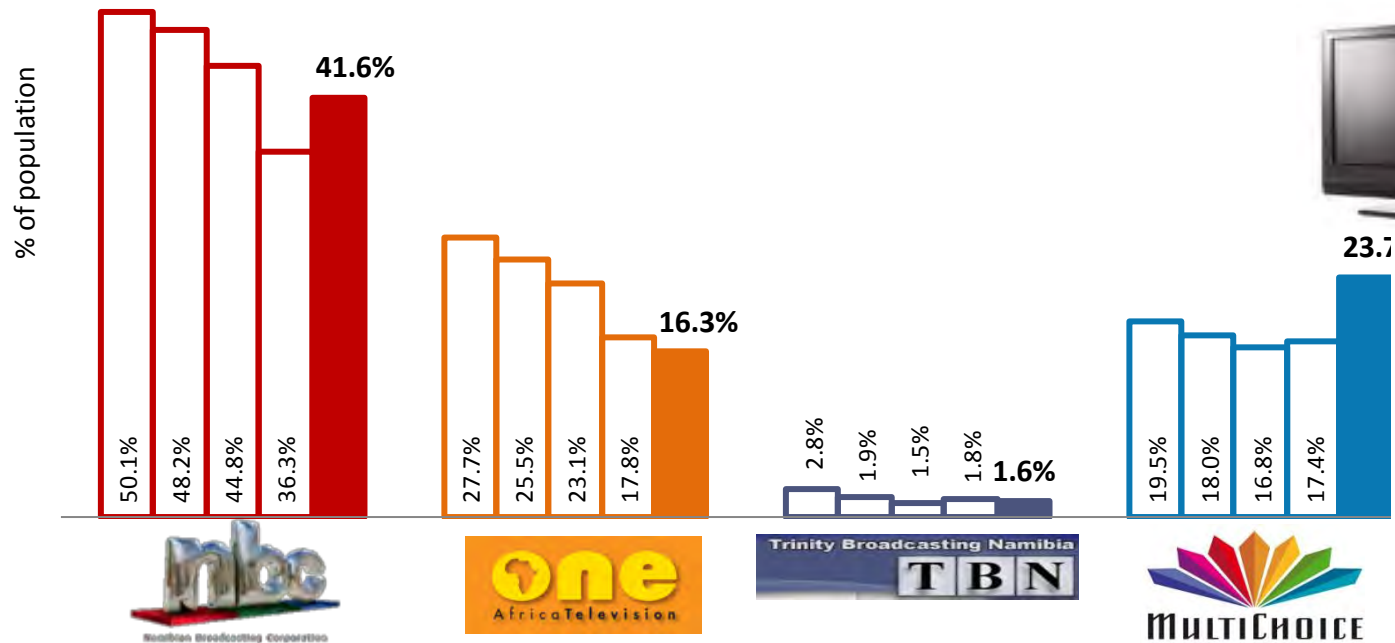
Television Breakdown



Television channels - viewership trends (watched yesterday)

Results based on sample of 2400 (2013)

Population (16+ years): 1279511



Year	Pop.
2009	606 524
2010	591 477
2011	557 032
2012	457 525
2013	532 409

Year	Pop.
2009	335 388
2010	312 768
2011	287 723
2012	224 372
2013	209 186

Year	Pop.
2009	33 572
2010	23 591
2011	18 506
2012	22 277
2013	20 928

Year	Pop.
2009	235 452
2010	220 361
2011	208 950
2012	219 010
2013	303 851

Radio breakdown

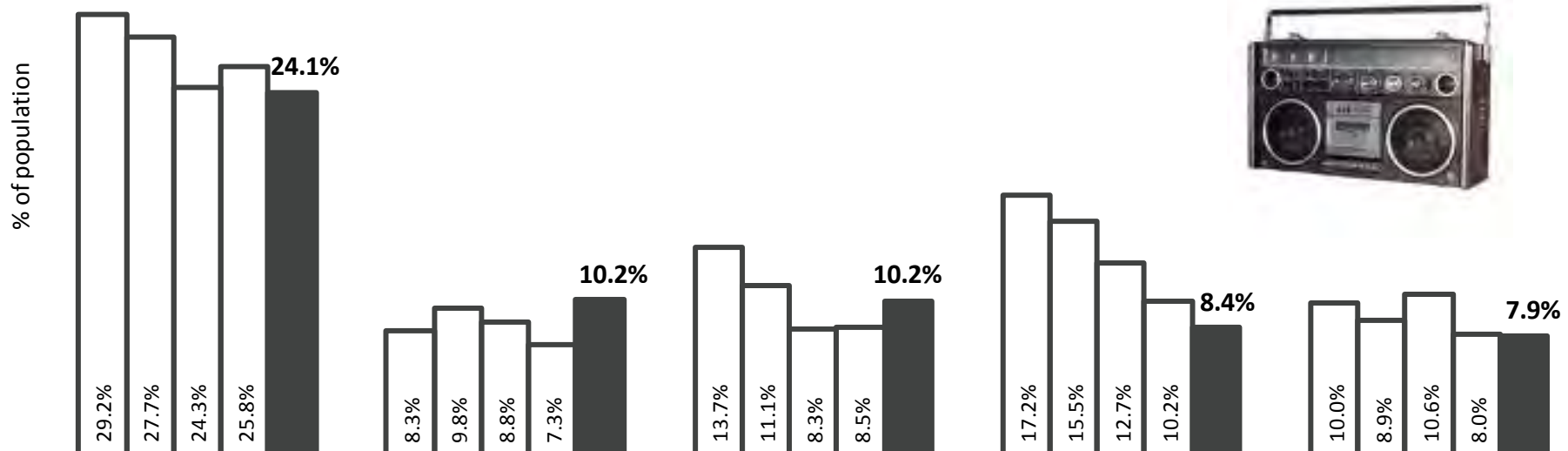


Radio listenership (listened yesterday): 2009-2013

□ 2009-2012 ■ 2013

Results based on sample of 2400 (2013)

Population (16+ years): 1279511



NBC Oshiwambo

Year	Pop.	Position
2009	353 016	1
2010	339 804	→ 1
2011	302 863	→ 1
2012	325 171	→ 1
2013	307 786	→ 1

Fresh FM

Year	Pop.	Position
2009	99 813	7
2010	119 633	↑ 5
2011	109 087	↑ 4
2012	92 296	↓ 5
2013	130 997	↑ 2

Omulunga

Year	Pop.	Position
2009	165 554	3
2010	136 692	↓ 4
2011	103 666	↓ 5
2012	106 632	↑ 3
2013	130 694	→ 3

NBC National Radio

Year	Pop.	Position
2009	207 821	2
2010	189 795	→ 2
2011	158 182	→ 2
2012	128 798	→ 2
2013	107 295	↓ 4

NBC Otjiherero

Year	Pop.	Position
2009	121 070	5
2010	108 589	↓ 7
2011	131 680	↑ 3
2012	100 851	↓ 4
2013	101 074	↓ 5

Print breakdown



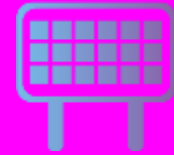
Total and Average Issue Readership per printed media category

Results based on sample of 2400

Population (16+years): 1279511

	<h3>Daily newspapers</h3>	<p>Average Issue Readers 324 923</p> <p>25.4% of the population is an AIR of at least one daily newspaper</p> <p>% AIR of Total Readers: 33.3%</p>	<p>Total Readers 976 159</p> <p>76.3% of the population has read/paged through a daily newspaper in the last 6 months</p>
	<h3>Weekly publications</h3>	<p>Average Issue Readers 313 991</p> <p>24.5% of the population is an AIR of at least one weekly publication</p> <p>% AIR of Total Readers: 48.6%</p>	<p>Total Readers 646 441</p> <p>50.5% of the population has read/paged through a weekly publication in the last 6 months</p>
	<h3>Fortnightly publications</h3>	<p>Average Issue Readers 116 580</p> <p>9.1% of the population is an AIR of at least one fortnightly publication</p> <p>% AIR of Total Readers: 43.0%</p>	<p>Total Readers 271 273</p> <p>21.2% of the population has read/paged through a fortnightly publication in the last 6 months</p>
	<h3>Monthly publications</h3>	<p>Average Issue Readers 210 000</p> <p>16.4% of the population is an AIR of at least one monthly publication</p> <p>% AIR of Total Readers: 59.7%</p>	<p>Total Readers 352 035</p> <p>27.5% of the population has read/paged through a monthly publication in the last 6 months</p>
	<h3>Bi-monthly publications</h3>	<p>Average Issue Readers 143 891</p> <p>11.2% of the population is an AIR of at least one bi-monthly publication</p> <p>% AIR of Total Readers: 77.8%</p>	<p>Total Readers 185 058</p> <p>14.5% of the population has read/paged through a bi-monthly publication in the last 6 months</p>

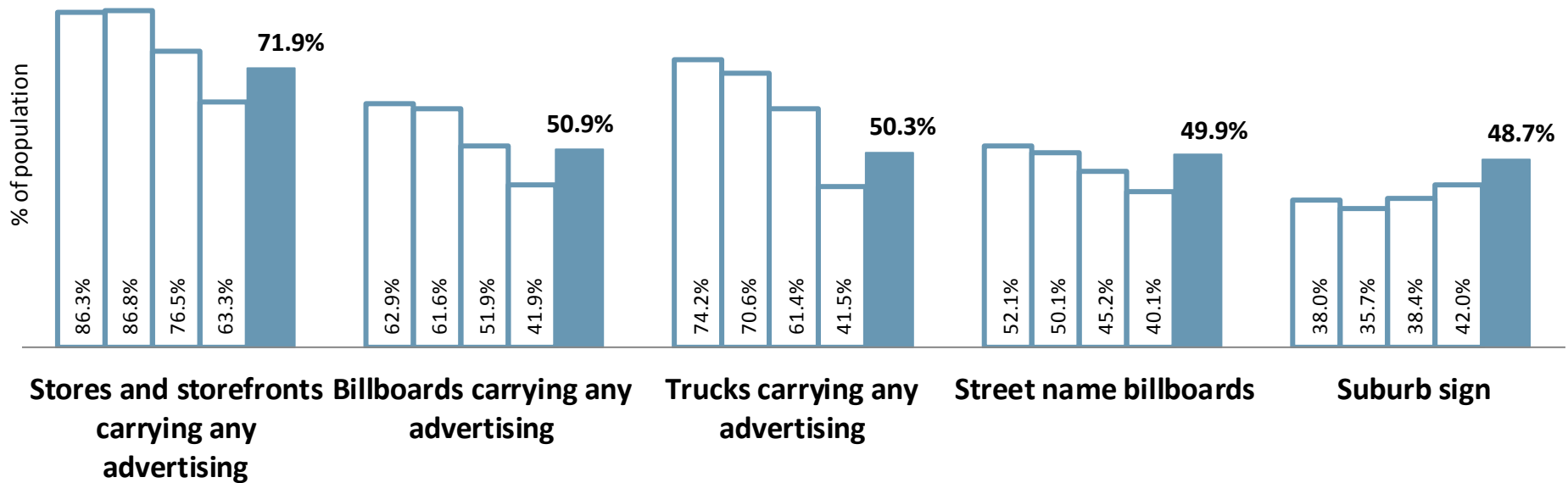
Outdoor breakdown



Outdoor media awareness - seen in the past week: 2009-2013

□ 2009-2012 ■ 2013

Results based on sample of 2400 (2013)
Population (16+ years): 1279511 (2013)



Year	Pop.	Position
2009	1 044 208	1
2010	1 064 945	➔ 1
2011	951 993	➔ 1
2012	799 008	➔ 1
2013	920 552	➔ 1

Year	Pop.	Position
2009	760 272	3
2010	756 143	➔ 3
2011	645 576	➔ 3
2012	529 058	➔ 3
2013	651 141	⬆ 2

Year	Pop.	Position
2009	897 853	2
2010	865 644	➔ 2
2011	763 994	➔ 2
2012	524 018	⬇ 4
2013	644 075	⬆ 3

Year	Pop.	Position
2009	630 312	5
2010	614 669	➔ 5
2011	562 700	➔ 5
2012	505 269	➔ 5
2013	638 116	⬆ 4

Year	Pop.	Position
2009	459 099	8
2010	438 047	⬇ 9
2011	477 173	⬆ 6
2012	530 372	⬆ 2
2013	622 598	⬇ 5

Online breakdown

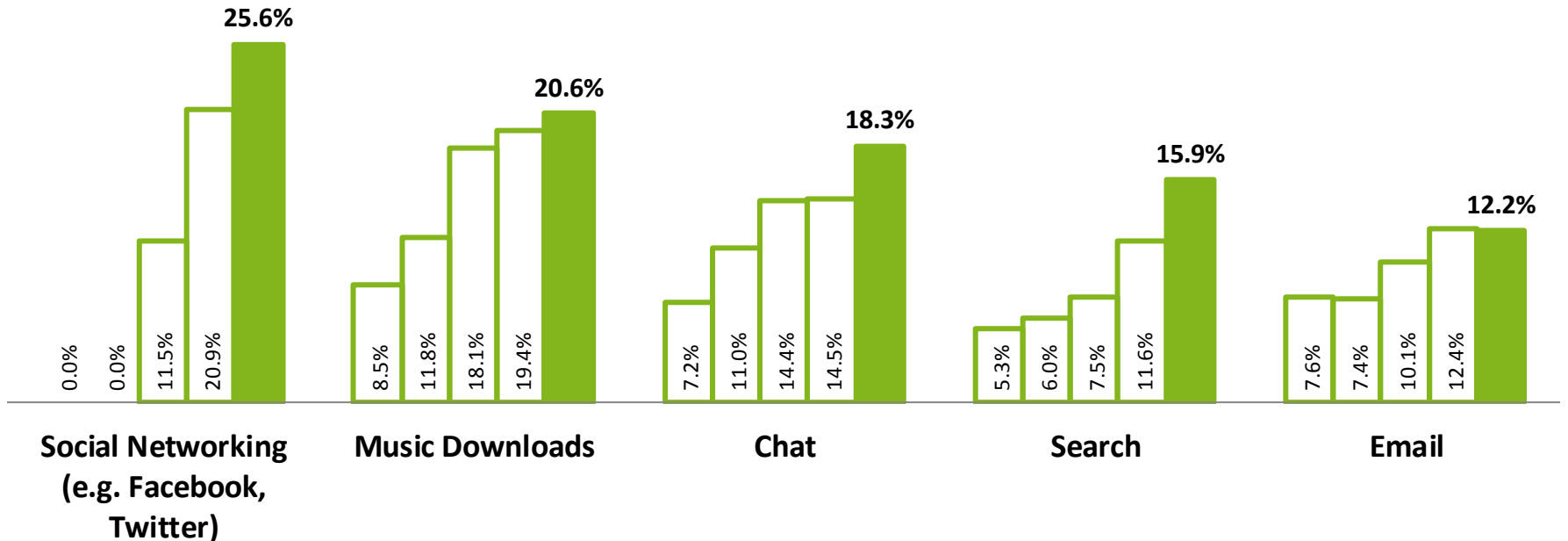


Internet access trends - online activities: 2009-2013

2009-2012 2013

Results based on sample of 2400 (2013)
Population (16+ years): 1279511 (2013)

% of population



Year	Pop.	Position
2009		
2010		
2011	143 171	3
2012	264 166	↑ 1
2013	327 216	→ 1

Year	Pop.	Position
2009	102 234	1
2010	144 396	→ 1
2011	225 730	→ 1
2012	244 997	↓ 2
2013	263 407	→ 2

Year	Pop.	Position
2009	87 187	4
2010	135 351	↑ 2
2011	179 661	→ 2
2012	183 236	↓ 3
2013	234 575	→ 3

Year	Pop.	Position
2009	64 442	5
2010	74 076	→ 5
2011	93 819	↓ 7
2012	146 108	↑ 6
2013	203 309	↑ 4

Year	Pop.	Position
2009	91 492	3
2010	91 029	↓ 4
2011	125 037	↓ 5
2012	156 335	→ 5
2013	156 722	→ 5

Nigeria



Information Supplied by:



Media Planning Services

Country Overview



Basic Country Statistics

	% or No:
Population	184,524,426 (2015 Est)
Urbanisation vs Rural	Urban-45%; Semi-urban-33%; Rural- 22%
GDP growth rate in 2014	3.86 (2015 Q1 Est) - NBS
% living below poverty line	33.1% (NPC)
Literacy in Adults over 15yrs	71.6% (NBS)
% of population below 15yrs	43.0% (2015 Q1 Est) - NBS
Administrative Division	37
No. of Television Sets	22 627 131
No. of Radio Sets	19 443 048
No. of Languages	5
No. of Religions	3
Local Currency	Naira
Exchange Rate (US\$)	N197.941 ≡ USD1
Latest Censor (Year)	2006

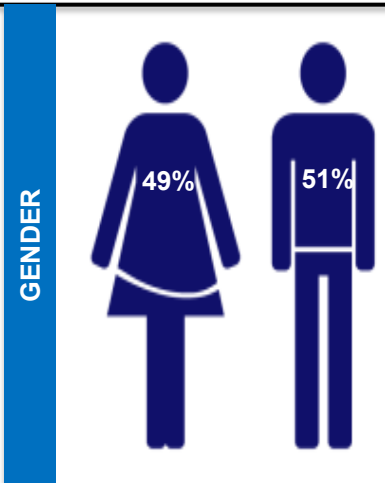
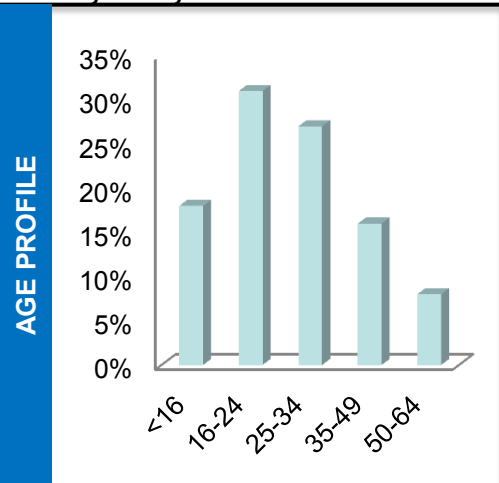
Current Political Environment

Current President	Muhammadu Buhari
Ruling Party	All Progressive Congress (APC)
No. Of Cell Phones	118.56 million (AMPS 2014)
No. Of Landlines	2.47 million (AMPS 2014)

Legislation changes 2015: General election successfully head in March 2015 with a change of government at all levels in May 29th , 2015.

TOTAL UNIVERSE SIZE
138,946,630

COUNTRY STATS



PRINCIPAL PURCHASER/DECISION MAKER

Female Head Of Household	53%
Male Head Of Household	26%
Other Adult Male	6%
Other Adult Female	13%
Children	2%
House Help	0%

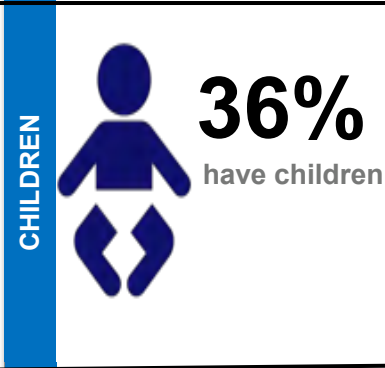
LANGUAGE

READ/UNDERSTAND

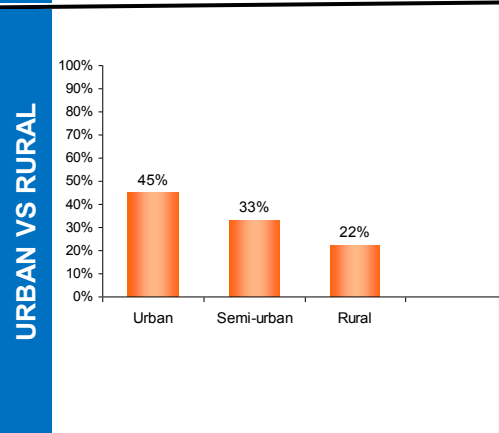
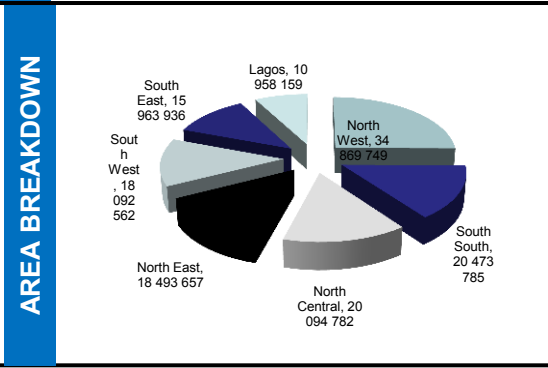
- English: 77%
- Pidgin English: 31%
- Hausa: 25%
- Yoruba: 22%
- Igbo: 16%
- Fulani: 4%
- Arabic: 4%
- Others: 13%

BANKING

Have an account with a registered bank
71%



LIFESTAGE



EDUCATION

High School	:39%
Primary School	:18%
Dip/Tech/sub-degree	:12%
University Degree	:11%
"A" Levels	:8%
No schooling	:5%
Others	:7%

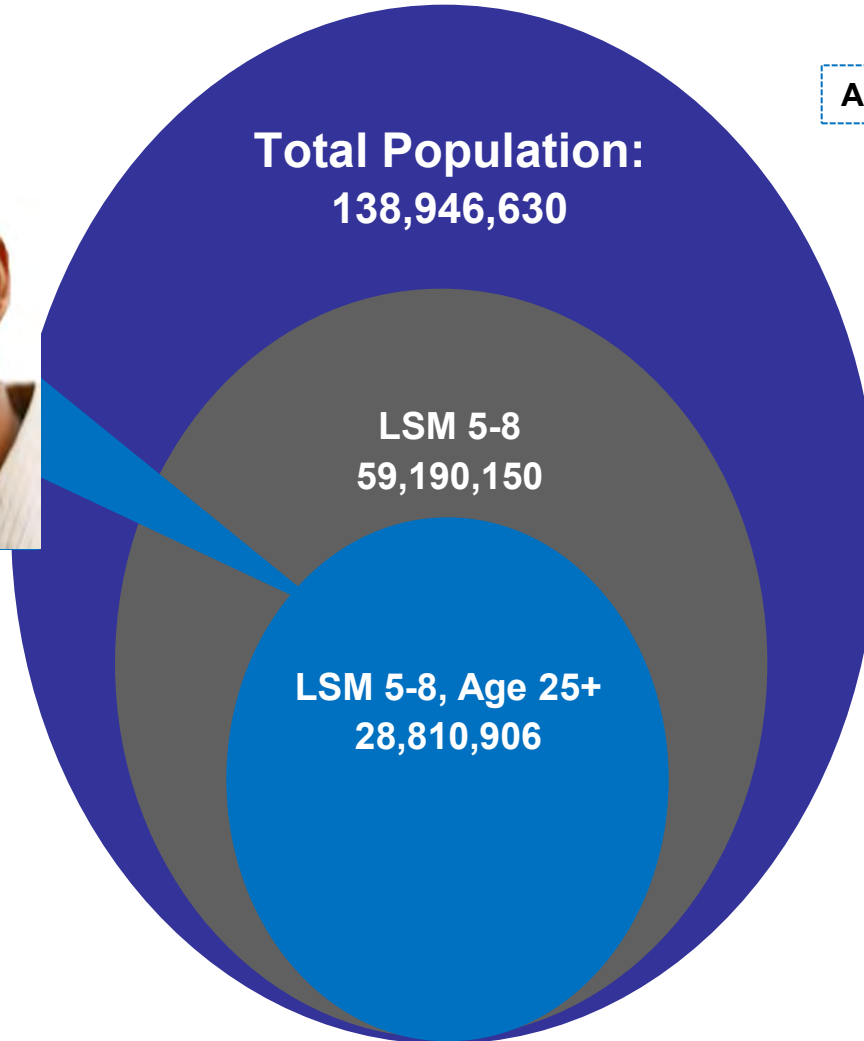
EMPLOYMENT

- Work Full Time: 18%
- Student: 34%
- Unemployed: 6%
- Self employed: 22%
- Retired: 2%
- Housewife: 6%
- Working Part Time :6%

MARITAL STATUS

- Single: 53%
- Married: 39%
- Widowed: 3%
- Divorced: 2%

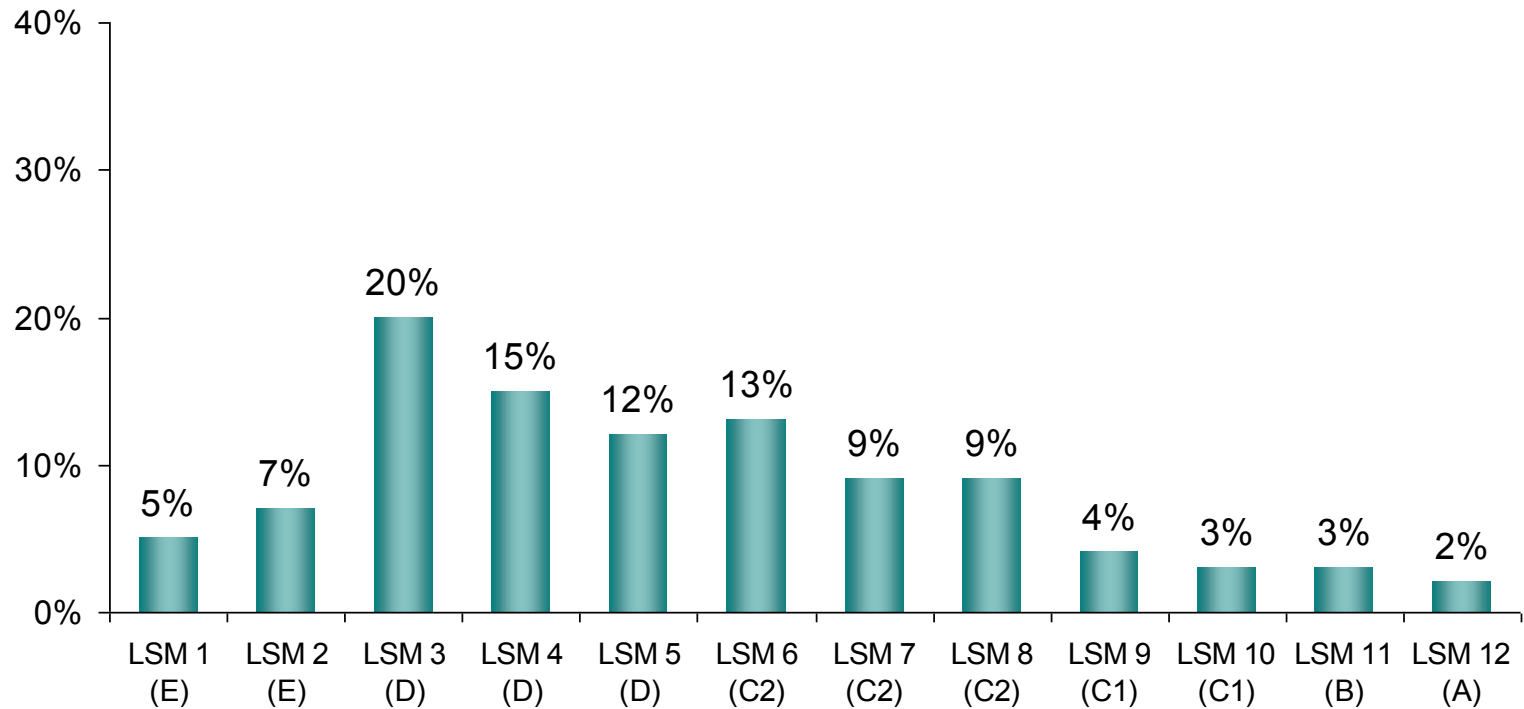
LSM OR ABC BREAKDOWN



All Adults

**TOTAL
UNIVERSE SIZE
138,946,630**

TOTAL LSM BREAKDOWN



LSM

Country Research Company



- Research House in market: Media Planning Services / MRC Ltd
- What is available:
 - AMPS
 - Diaries
- Clients / Agencies:



Country Research Company



- **Media Monitoring Companies:**
 - Media Monitoring Services Ltd;
 - MediaTrak Ltd;
 - Content & Compliance Monitoring Ltd
 - TMKG Ltd
- **Methodology – how done: watermarking, Pattern matching, & manual collection**
- **Controlling Industries Bodies: APCON; NBC, OAAN, & MIPAN**
- **Compliance Country Rate:**
 - TV 85%
 - Radio 90%
 - OOH 95%

AMPS

Media Diaries

Last Survey Released	2014	Last Survey Released	July 2015
Type of Interview Sample Size	Face-to-Face In-home (personal) 21,350	Type of Interview Sample Size	Diaries Placed In-Home 24,640
Scope of Survey (Universe)	FCT + 36 States (Urban & Rural) Nigeria	Scope of Survey (Universe)	18 Key Urban Areas / States across Nigeria
Media Covered Brands covered	- Print / Broadcast / outdoor / Road show / Internet Usage / Cinema – 2,632 Brands	Media Covered Brands covered	2 – Radio & Television
Survey Funding Cost of Survey	Media Planning Services USD – 6,667.00	Survey Funding Cost of Survey	Media Planning Services USD – 10,000.00
Next Survey	June - Sep 2015	Next Survey	Aug 2015

Media Overview - Channels & Media Reach

Medium

2012

2013

2014

No of
Stations

%
Reach

No of
Stations

%
Reach

No of
Stations

%
Reach

TV

180+

85%

200+

86%

200+

85%

Radio

200+

89%

220+

89%

220+

91%

Newspapers

80+

35%

80+

37%

80+

44%

Magazines

65+

19%

70+

21%

70+

37%

Cinema Screens

50+

7%

50+

6%

50+

14%

Outdoor
Companies

Online

43.1m

33%

54.1m

42%

54.1m

44%

Mobile (Calls)

97m

74%

99.5m

74%

85.4m

64%

MEDIA OVERVIEW/ CELLULAR



- Number of Active Cellular Phones: 118.56 million
- Information on Cellular:
 - Active Landline Phones: 2.47million
 - Mobile phones:
 - Smart Phones: 10.06 million
 - Tabs: 4.97 million
 - Feature Phones: 103.23 million
- Operators: MTN, Airtel, Globacom, Etisalat, & Visafone
- Penetration: 85%



Size (Cell in Working Order): 118,564,241
Base: Male / Female, 7 - 55 yrs+,
ABC1C2DE – 138,946,630
Sources: AMP 2014

Television consumption



96%

Watch TV

59% are heavy viewers (4+ hrs pw)
53% have DSTV Compact

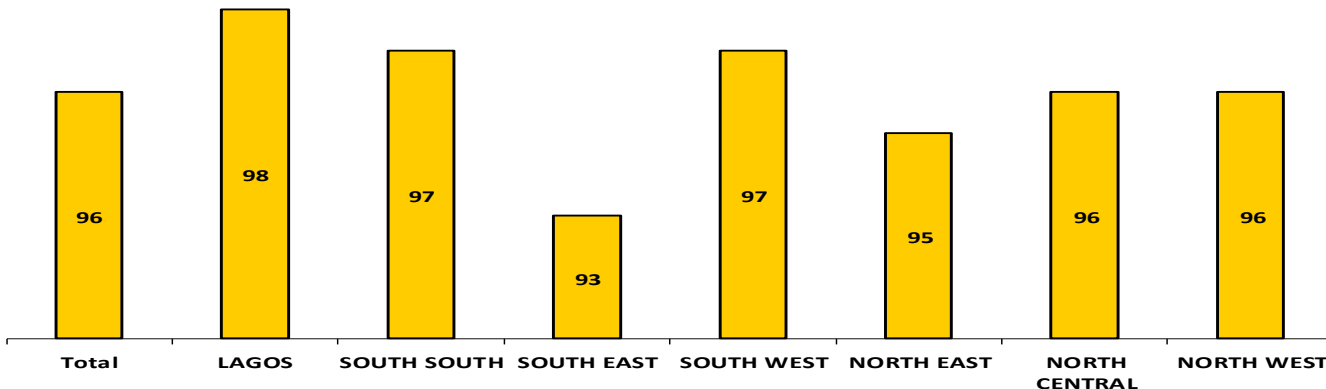
TOP STATIONS

TOP 5 PER REGION

Lagos		South West		North West	
ONTV	20%	NTA Channel 4, 5 & 7 Ibadan	9%	CTV Channel 67, Kano	11%
TV Continental (TVC)	16%	Bcos Channel 28 Ibadan	8%	NTA Kano	11%
Silverbird TV Lagos	13%	OSBC Osogbo	7%	Nta Sokoto	6%
AIT Lagos	10%	NTA Akure	7%	NTA Dutse	5%
Galaxy TV Lagos	10%	OSBC Akure	7%	NTA Kaduna	5%
South South		North East			
RSTV Port Harcourt	10%	BRTV Maiduguri	16%		
NTA Port Harcourt	9%	NTA Maiduguri	15%		
AKBc Uyo	7%	BATV Bauchi	12%		
ITV Benin	7%	NTA Bauchi	9%		
DBS TV Warri	6%	NTA Gombe	7%		
South East		North Central			
ABS Awka	11%	PRTV Jos	9%		
ETV Enugu	10%	CTV Lokoja	8%		
NTA Owerri	10%	NTA Minna	8%		
NTA Awka	8%	NTA Ilorin	6%		
AIT Enugu	8%	NBS TV	6%		



TV PENETRATION



Radio Consumption



98%

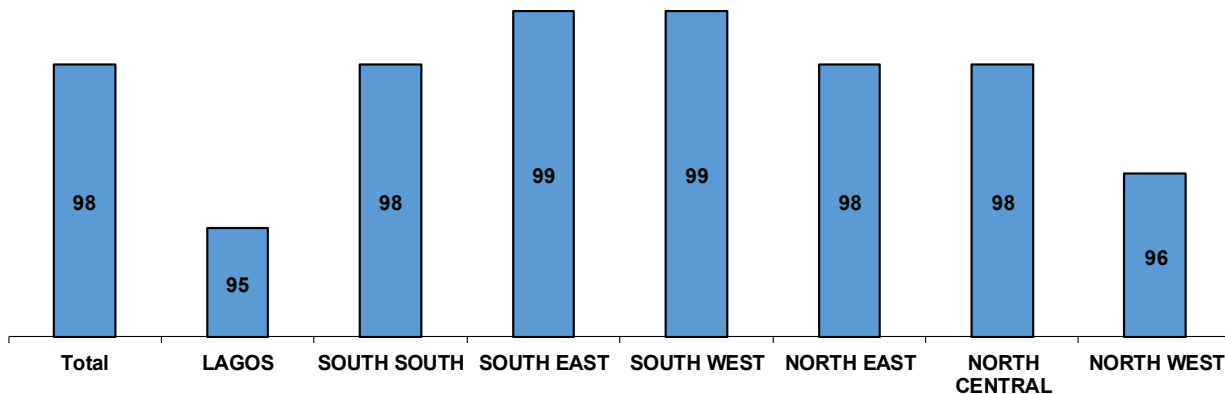
Listen to radio

TOP 5 PER REGION

Lagos		South West		North West	
Wazobia 95.1 FM, Lagos	14%	Splash 105.5 FM, Ibadan	7%	Freedom Radio 99.5 FM, Kano	7%
Bond 92.9 FM, Lagos	11%	BCOS 98.5 FM, Ibadan	6%	Radio Kano FM	6%
Ray-power 100.5 FM, Lagos	8%	Positive 102.5 FM, Akure	6%	Pyramid 103.5 FM, Kano	5%
Naija 102.7 FM, Lagos	7%	Premier 93.5 FM, Ibadan	5%	Radio Kano 1, AM 729 MW	5%
Cool 96.9 FM, Lagos	6%	Amuludun FM, Ibadan	5%	Rahma 97.3 FM Kano	5%
South South		North East			
AKBC -2 90.5 FM, Uyo	7%	Fombina 101 FM, Yola	8%		
CR Radio (105.5 FM), Calabar	7%	BRC AM, Bauchi	7%		
Atlantic 104.5 FM, Uyo	6%	FM Bauchi	7%		
Cross River FM-2, Ikom	6%	Globe FM Bauchi	7%		
Wazobia 94.1 FM, PH	6%	BBC (Hausa Service)	7%		
South East		North Central			
Orient 94.4 FM, Owerri	8%	Benue Radio FM, Makurdi	9%		
ABS FM, Awka	7%	Benue Radio AM, Makurdi	6%		
Purity 102.5 FM, Awka	7%	Grace 95.5 FM, Lokoja	6%		
Radio Nigeria (SW), Enugu	7%	Joy 96.5 FM, Otukpo	5%		
Heartland 100.5 FM, Owerri	7%	Hamony 103.5 FM, Ilorin	4%		

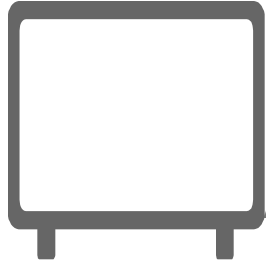


RADIO PENETRATION



Ooh Consumption

OOH



87%

Are exposed to OOH

TOP FORMATS

Posters	89%	Directional Signage	22%
Banners	67%	Street Light Pole Advertising	20%
Billboards	65%	Electronic Billboards	18%
Shop Paintings	51%	Electronic Displays	13%
Bus Branding	44%	Mascot	12%
Mobile Vans	39%	Stadium Billboards	12%
Shop Displays	38%	Rubbish Bin Branding	10%
Wall Branding	35%	Shopping Trolleys	8%
Bus Shelters	29%	City Clocks	8%
Motorcycle Helmet	28%	None	1%
Supermarket Displays	25%	Other Advertising Media	1%

Mode of Transport:

71% take a public mini-bus

17% drive their own car

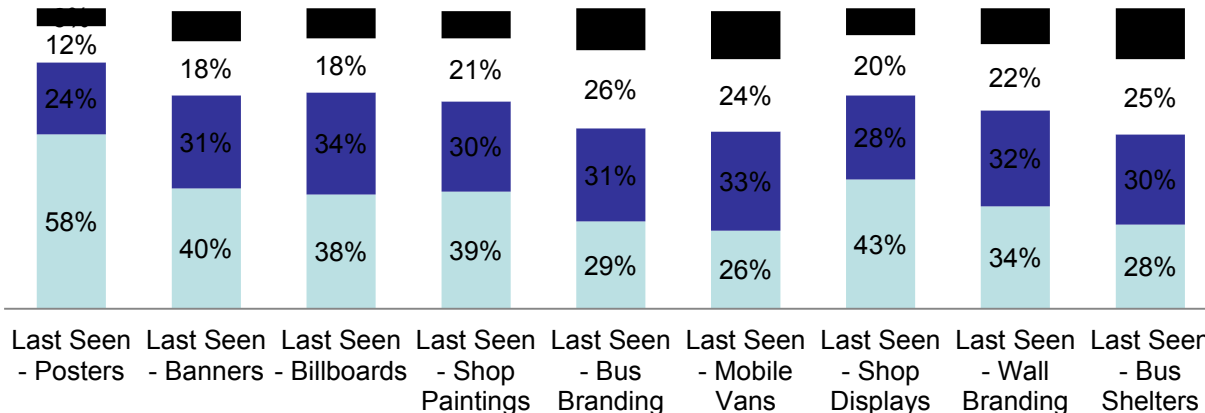
60% shop at open market

20% shop at neighbourhood stores



OUTDOOR ADVERTISING RECALL

■ Yesterday
 ■ Past 7 Days
 ■ Past 4 Weeks
 ■ Less Often



Mobile/digital consumption



**Accessed Internet
Yesterday: 15%
P7D: 8%**

Search: 10%
Email: 10%
Making friends: 2%
Check sport: 2%
Downloading: 5%
Read/Access news: 4%
Chat: 17%

ACTIVITY VIA CELL PHONE

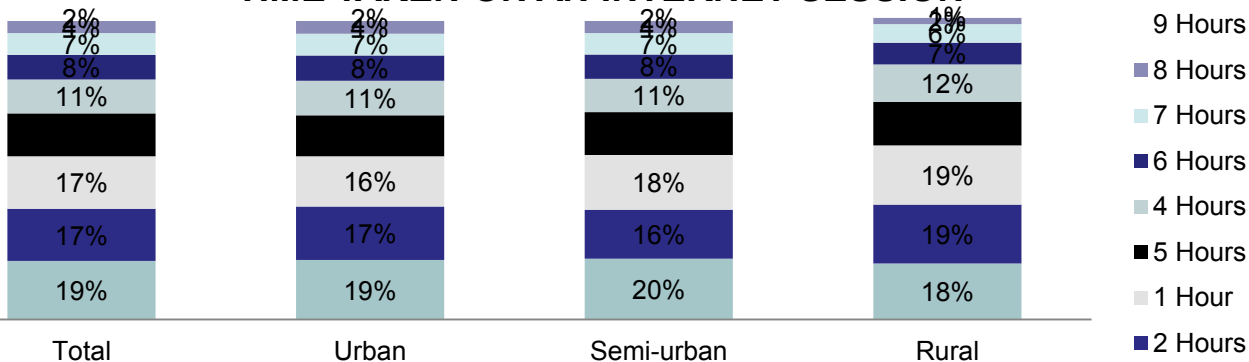
Sent SMS Using Mobile Phone	59%
Made Call Using Mobile Phone	59%
Participated In Event Promotion Using SMS	8%
Participated In Sales Promotion Using SMS	9%
Listen To Radio Through Mobile Phone	42%
Participated In Radio/TV Talk Show-SMS	13%
Participated In Radio/TV Talk Show-Calling	16%
Listen To Music On Mobile Phone	51%
Watched TV On Mobile Phone	21%
Read/Send Mail Through Mobile Phone	22%



**84% have a cell
phone**

**12% have a
smartphone & TAB**

TIME TAKEN ON AN INTERNET SESSION



Print Consumption

PRINT / PRESS



69%

Have read Newspaper

65%

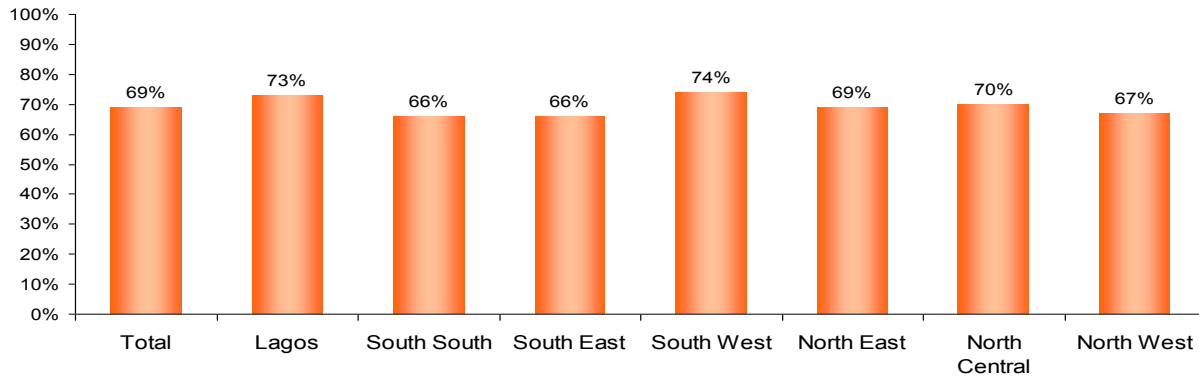
Have read Magazines

TOP TITLES

BASE	103 023 358	
The Punch	10%	10 598 565
Daily Trust	10%	10 120 840
The Nation	9%	9 502 890
The Sun	7%	7 695 125
Vanguard	7%	7 602 909
The Standard	6%	5 694 751
The Guardian	6%	5 666 661
Tribune	4%	4 553 298
Complete Sports	4%	4 408 641
Alaroye	3%	3 453 630
Leadership	2%	2 561 766
This Day	2%	2 511 565
Sunset	2%	2 482 359



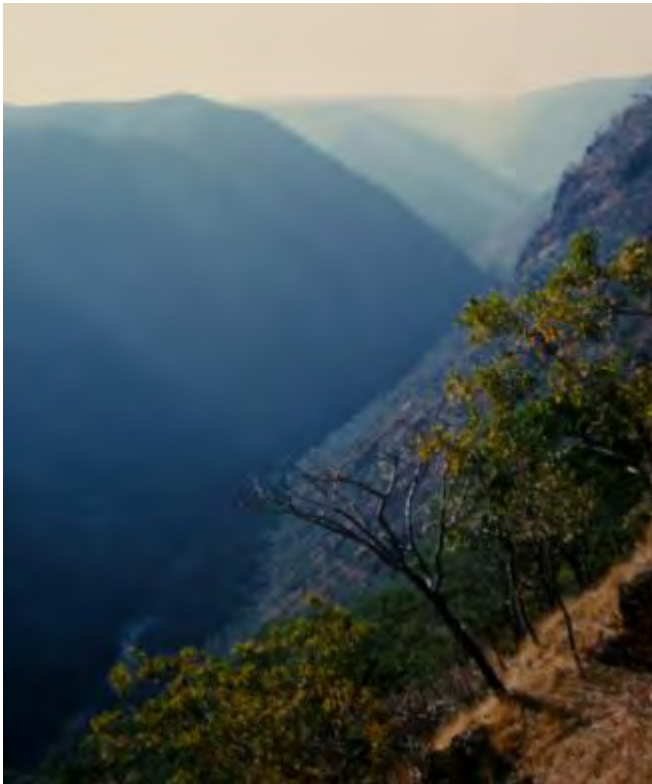
Newspaper Penetration



IPSOS RWANDA



Country Overview



Basic Country Statistics

	% or No.
Population	12 589 823
Urbanization Vs Rural	5%
GDP Growth rate in 2014	6.2
% living below poverty line	45%
Literacy in Adults over 15yrs	65.90%
% of population below 15yrs	42.9
Administrative division	5 provinces, 30 districts,
# of TV sets	
# Of Radio sets	
# of languages	3
# of Religions	2
Local Currency	Rwandese Francs (RWF)
Exchange rate	dollar averages at 700 Rwf
latest censor	2012

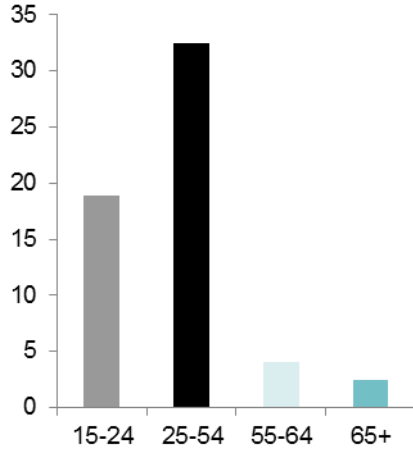
Current Political Environment

Current president	HE Paul Kagame
Ruling Party	RPF
# of Cell phones	50% of pop has at least on phone
# of landlines	2

**TOTAL
UNIVERSE SIZE
12 589 823**

COUNTRY STATS

AGE PROFILE



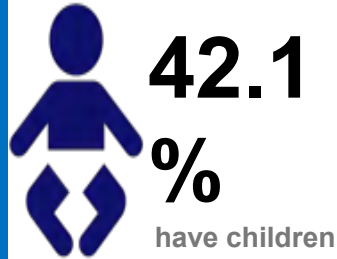
GENDER



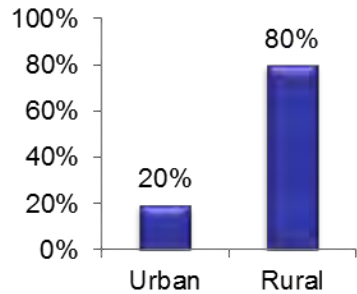
BANKING

Have an account with a registered bank **42%**. Out of that 42%, 23% are in commercial banks while 33% are in non-bank formal intuitions

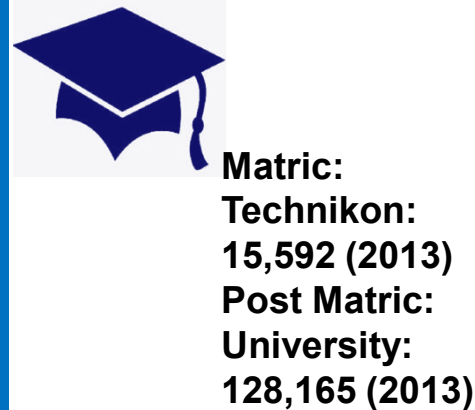
CHILDREN



URBAN VS RURAL

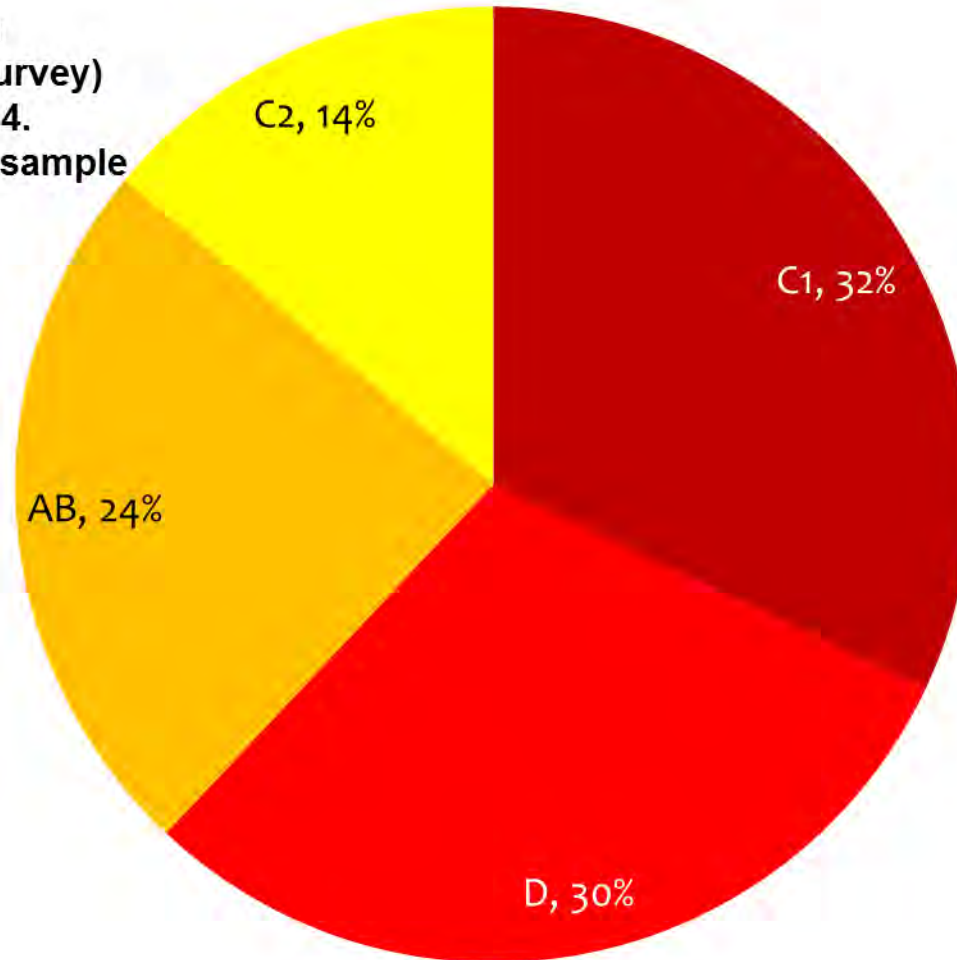


EDUCATION



ABC BREAK DOWN

Data from RAMS (Rwanda Audience Measurement Survey) conducted in Nov/Dec 2014. Done only in Kigali with a sample size of 1,005



AB - LSM13 to
17
C1 - LSM10 to
12

Base: 750404 (Persons aged 15 years and above)

Country Research Company

- RAMS was conducted by ipsos Rwanda in partnership with Real Group Rwanda
- The cost to buy the research is 2,200 USD
- Diaries data is available, RAMS and market research
- The clients who have bought the data so far are below:



Country Research Company

- **Currently Media Monitoring is done only by Ipsos Rwanda, some agencies also do it but not like Ipsos**
- **The cost for advertising monitoring is 5% of Ad budget and editorial monitoring without online is 500 USD/month and online is an additional 500 USD/month**
- **Data collection is automated using Ad Catch system**
- **The regulatory bodies are RURA (Rwanda Utilities Regulatory authority, RGB (Rwanda Governance Board), RMC (Rwanda Media Commission) and MHC (Media High Council)**
- **Compliance country rate is:**
 - TV 70%**
 - Radio 70%**

Country Research

RAMS

Media Diaries

Last Survey Released	2014	Last Survey Released	2014
Type of Interview	adults age 15+	Type of Interview	Adults, aged 15+
Scope of Survey (Universe – Cities)	Kigali	Scope of Survey (Universe)	Kigali
Media Covered Brands covered	Print / Broadcast / outdoor/ Internet Usage/	Media Covered Brands covered	Print / broadcast
Survey Funding Cost of Survey	Self Funding	Survey Funding Cost of Survey	Self Funding
Next Survey	Q3 2015	Next Survey	Q3 2015
Sample Size & Methodology	1000+ P&P, F2F, Diaries	Sample Size & Methodology	1000+ F2F, Diaries



MEDIA OVERVIEW/ UPDATE

Industry Exposure by Medium

SECTION	% Print	PRINT	% Radio	RADIO	TOTAL RWf
<i>CORPORATE and MULTIBRAND</i>	63.0%	1,857,293,226	16.0%	889,924,700	2,747,217,926
<i>COMMUNICATIONS</i>	6.6%	195,440,894	25.7%	1,429,828,000	1,625,268,894
<i>FINANCIAL SERVICES</i>	17.0%	502,539,662	19.3%	1,073,288,250	1,575,827,912
<i>TOURISM and ENTERTAINMENT</i>	1.2%	35,233,940	7.5%	418,172,750	453,406,690
<i>PUBLISHING and EDUCATION</i>	5.6%	166,551,279	5.0%	275,627,250	442,178,529
<i>BEVERAGES</i>	1.6%	47,598,090	5.9%	327,819,000	375,417,090
<i>TRANSPORT</i>	2.6%	75,702,624	5.1%	285,755,250	361,457,874
<i>HOUSEHOLD</i>	1.1%	33,063,703	4.3%	237,297,750	270,361,453
<i>PERSONAL CARE</i>	0.0%	211,220	3.0%	165,740,500	165,951,720
<i>RETAIL</i>	0.1%	3,149,249	2.7%	151,328,000	154,477,249
<i>PHARMACEUTICALS</i>	0.4%	12,930,600	2.1%	115,819,250	128,749,850
<i>FOODS</i>	0.1%	1,821,900	2.2%	121,150,500	122,972,400
<i>OFFICE EQUIPMENT and SERVICES</i>	0.2%	4,522,000	1.1%	62,665,500	67,187,500
<i>SUPPLEMENTS and CONGRATULATIONS</i>	0.3%	9,284,853	0.0%		9,284,853
<i>CLOTHING, FABRICS and FOOTWEAR</i>	0.0%	180,000	0.1%	3,960,750	4,140,750
<i>VETERINARY and AGRICULTURE</i>	0.1%	2,805,100	0.0%	884,500	3,689,600
TOTAL SPENDS RWf		2,948,328,340		5,559,261,950	8,507,590,290

Television consumption



Share of time spent on TV



TOP CHANNELS

Rwanda TV: 25%

TV1: 16%

Lemigo: 13%

TV10: 10%

Base: Past 7 day TV viewers = 555,299
(Persons ages 15yr+)



Weekly reach: Total survey area

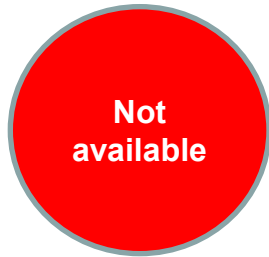
Audience Size

Channel	Share of Time Spent	Audience Size
Rwanda TV	25%	138,825
TV 1	16%	86,071
Lemigo	13%	74,410
TV 10	10%	52,753

Radio Consumption



Share of time spent on radio



TOP Radio Stations

- Radio Rwanda: 10%
- Kiss FM: 21%
- Flash FM: 18%
- Radio 10: 17%
- Isango Star: 16%
- KFM: 13%
- Radio 1: 13%
- Radio Salus: 12%
- City Radio: 11%
- ContactFM: 10%



Radio Reach: Total survey area

Audience Size

Station	Share of time spent on radio	Audience Size
	35%	230,412
Kiss FM	21%	140,251
	18%	118,211
	17%	114,204
	16%	106,858
KFM	13%	88,825
Radio 1	13%	85,486
	12%	79,475
	11%	75,468
	10%	66,118

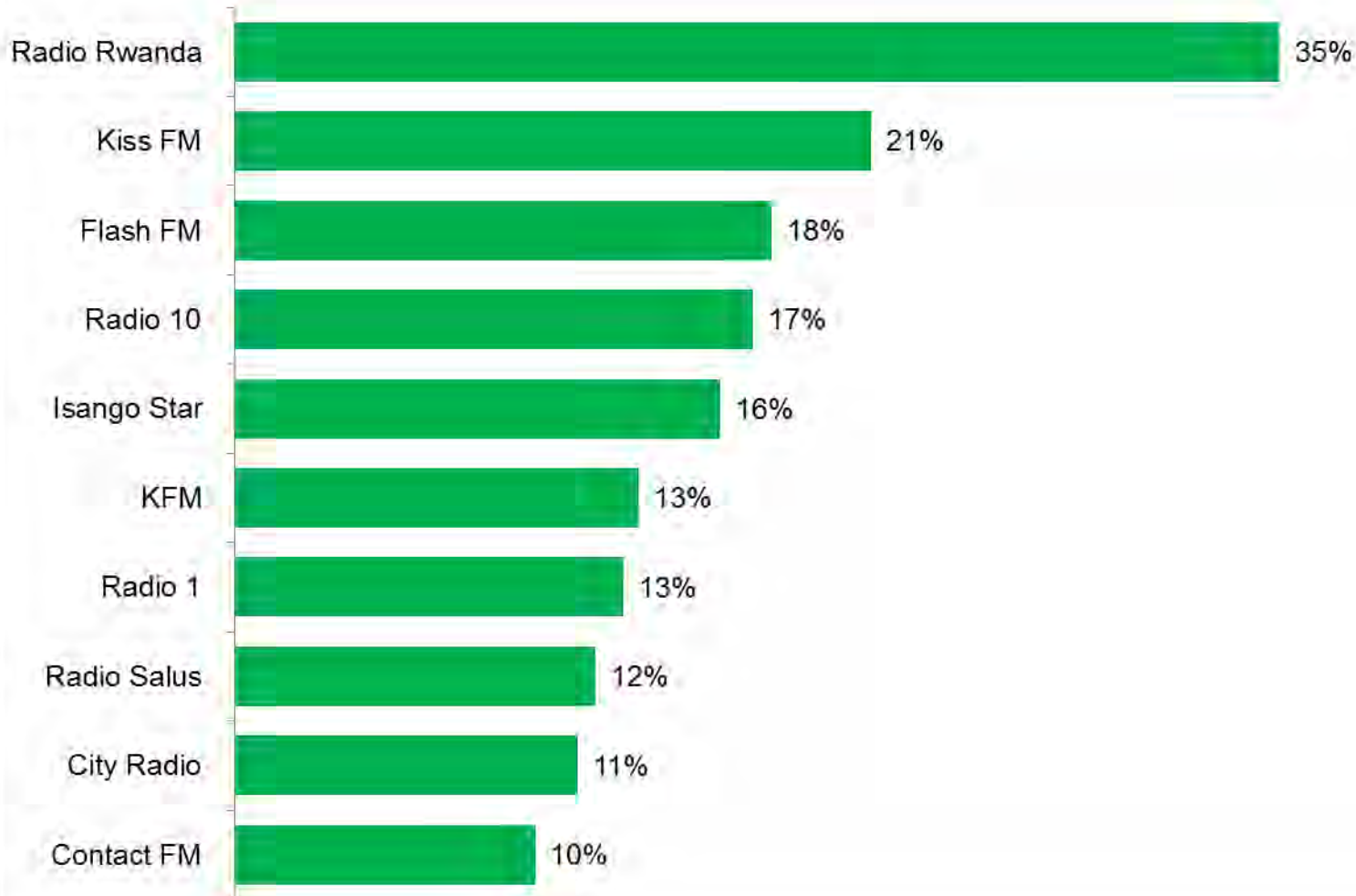
Base: 667,860 Past 7 Days Radio Listeners (Persons aged 15 years and above)



Radio Reach : Total Survey Area

Top Radio Stations Based on Reach

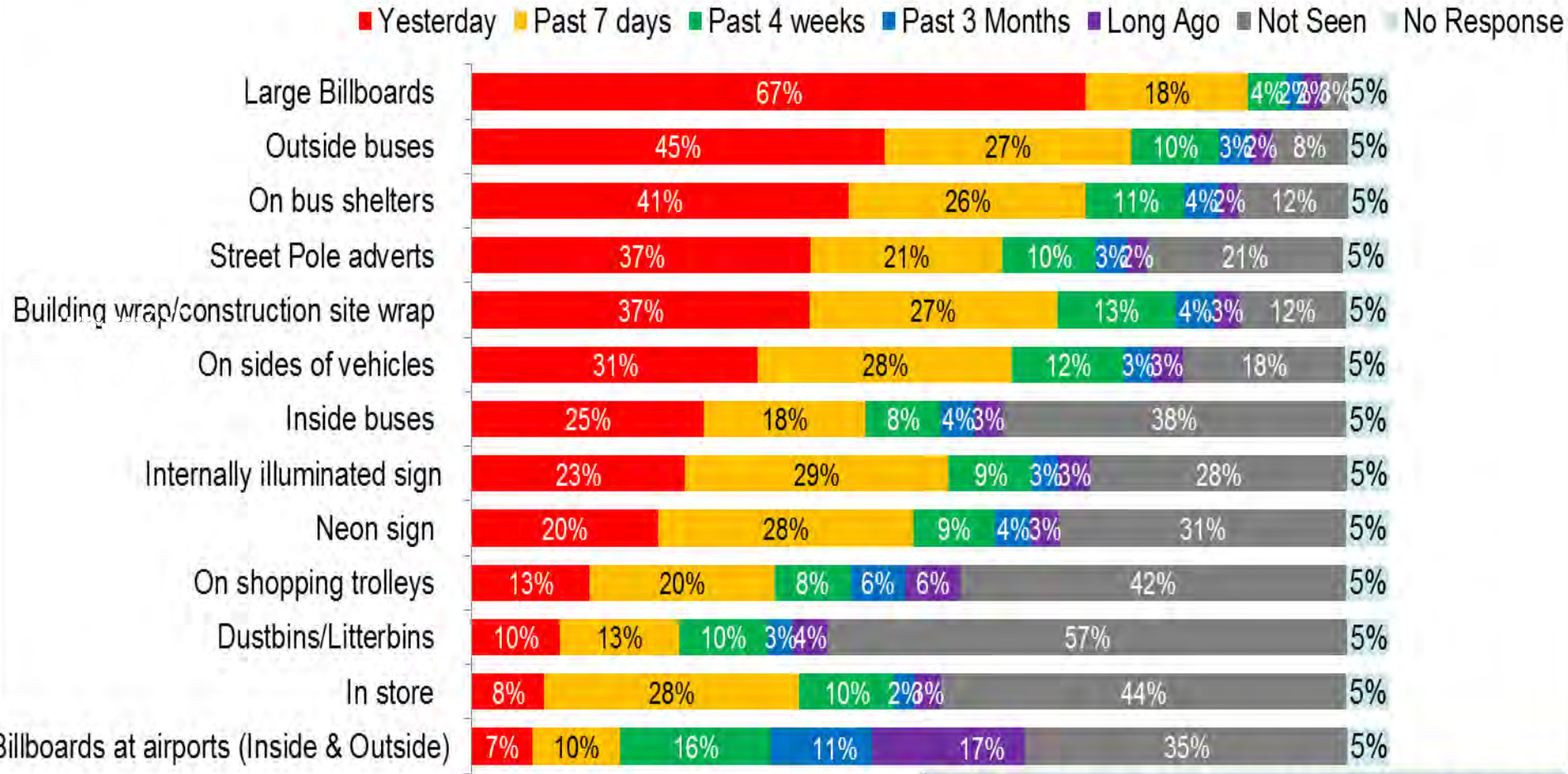
Stations with a reach \geq 10%



Base: 667,860 Past 7 Days Radio Listeners (Persons aged 15 years and above)

Ooh Consumption

Outdoor: Incidence of Access



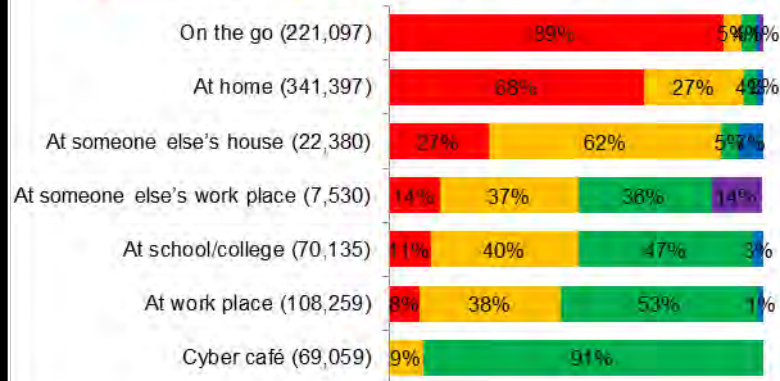
Base: 750,404 (Persons aged 15 years and above)

Mobile/digital consumption

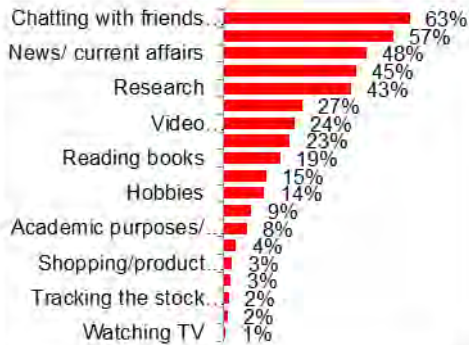


INTERNET ACTIVITY PLACE AND MODE OF ACCESS

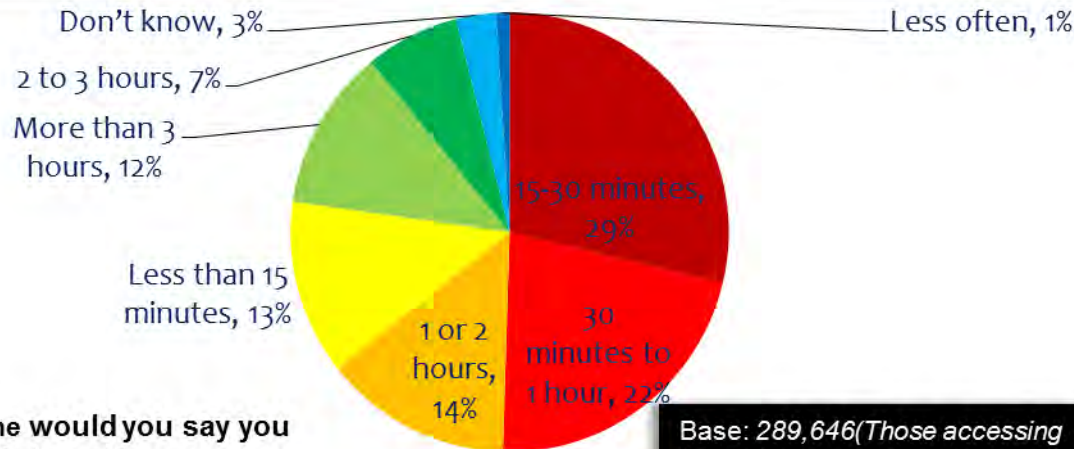
■ Mobile phone ■ Laptop ■ Desktop ■ Tablets ■ Other



Internet activities



Time spent on the internet session



How much time would you say you spend on the internet?...

Base: 289,646(Those accessing the internet)



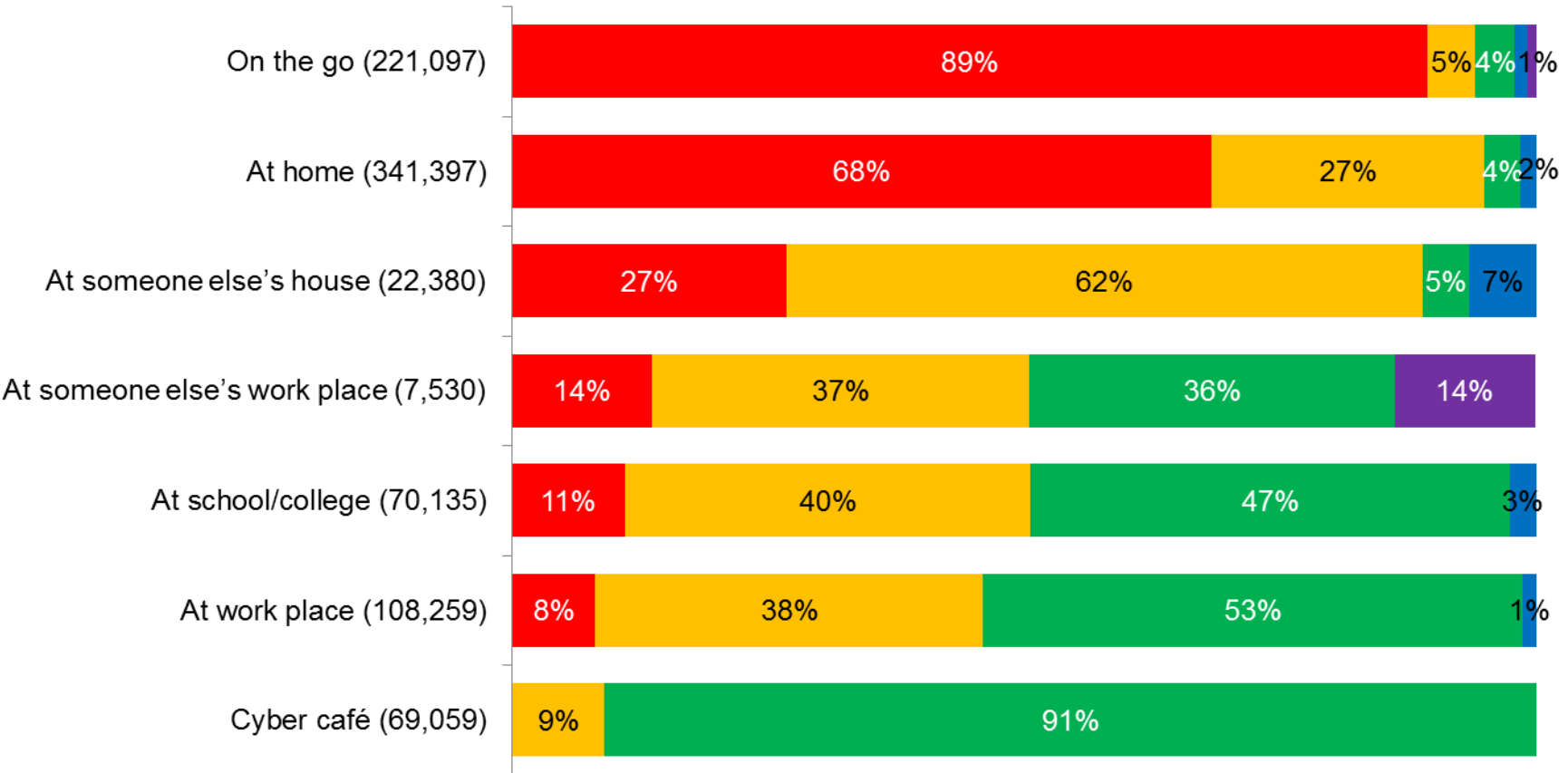
DIGITAL

MOBILE

Past 4 Weeks Internet Access

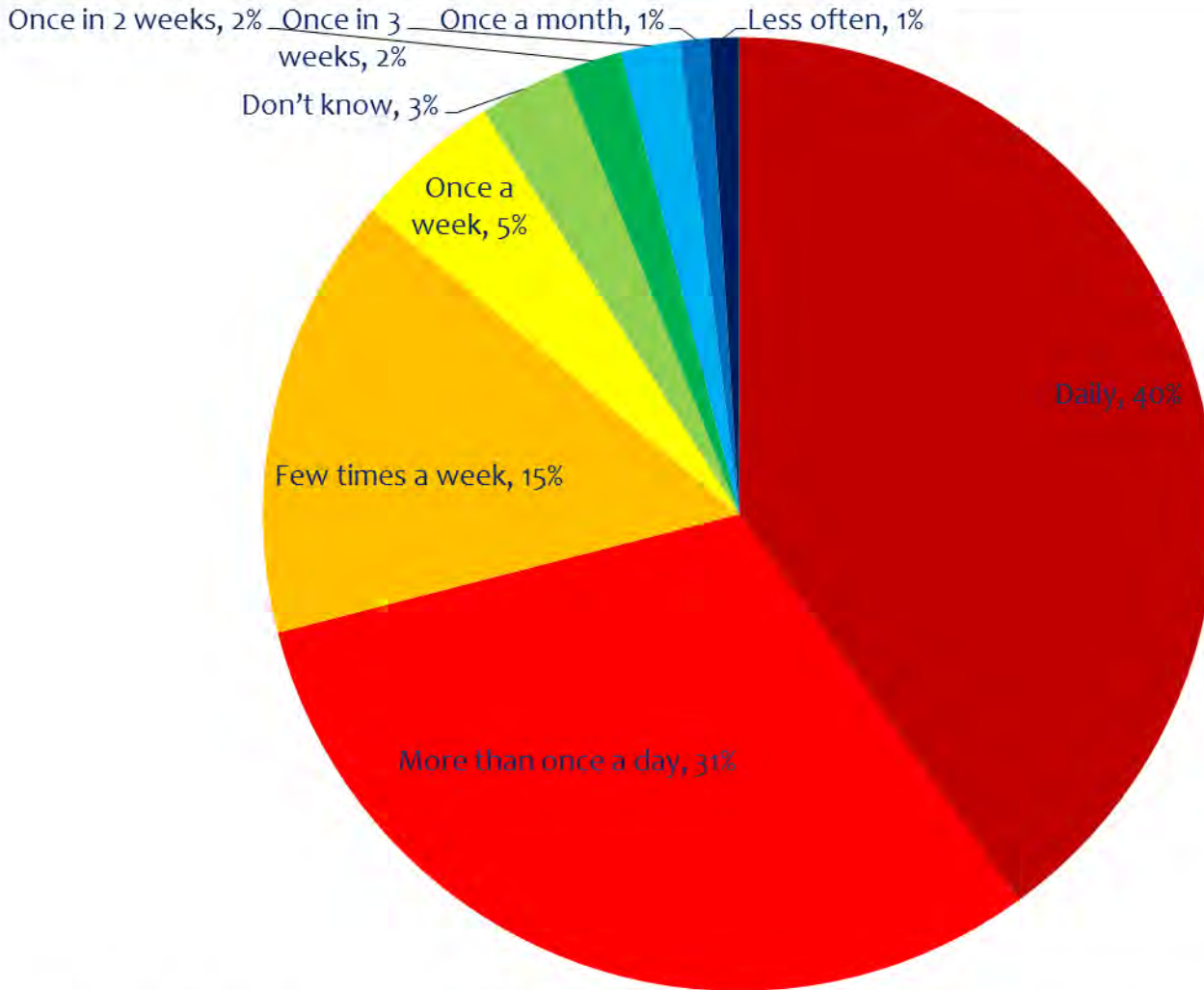
Device used by Place of Access

■ Mobile phone
 ■ Laptop
 ■ Desktop
 ■ Tablets
 ■ Other



Base: Used the internet in the Past 4 Weeks (Persons aged 15 years and above)

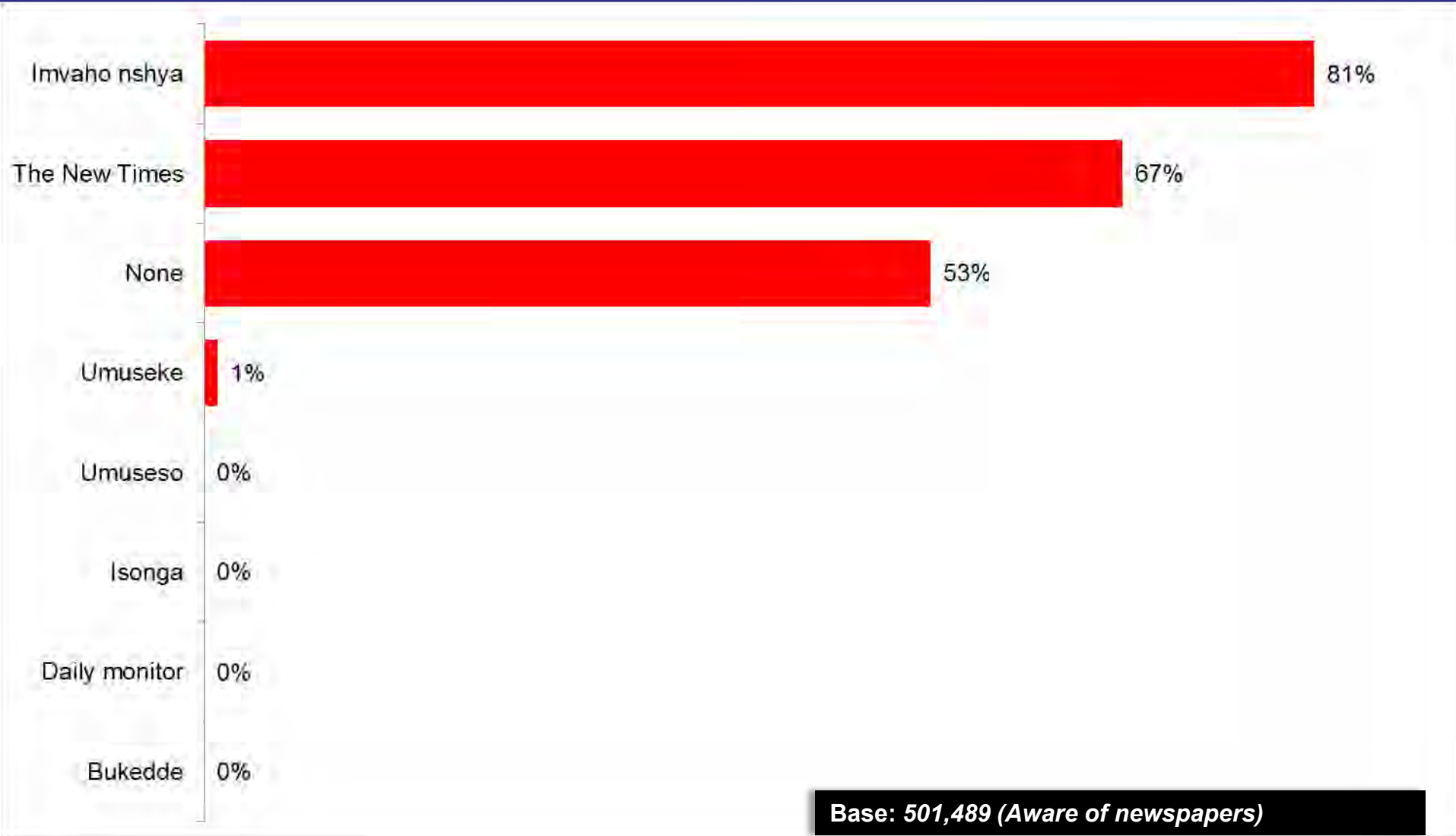
Frequency of using Internet



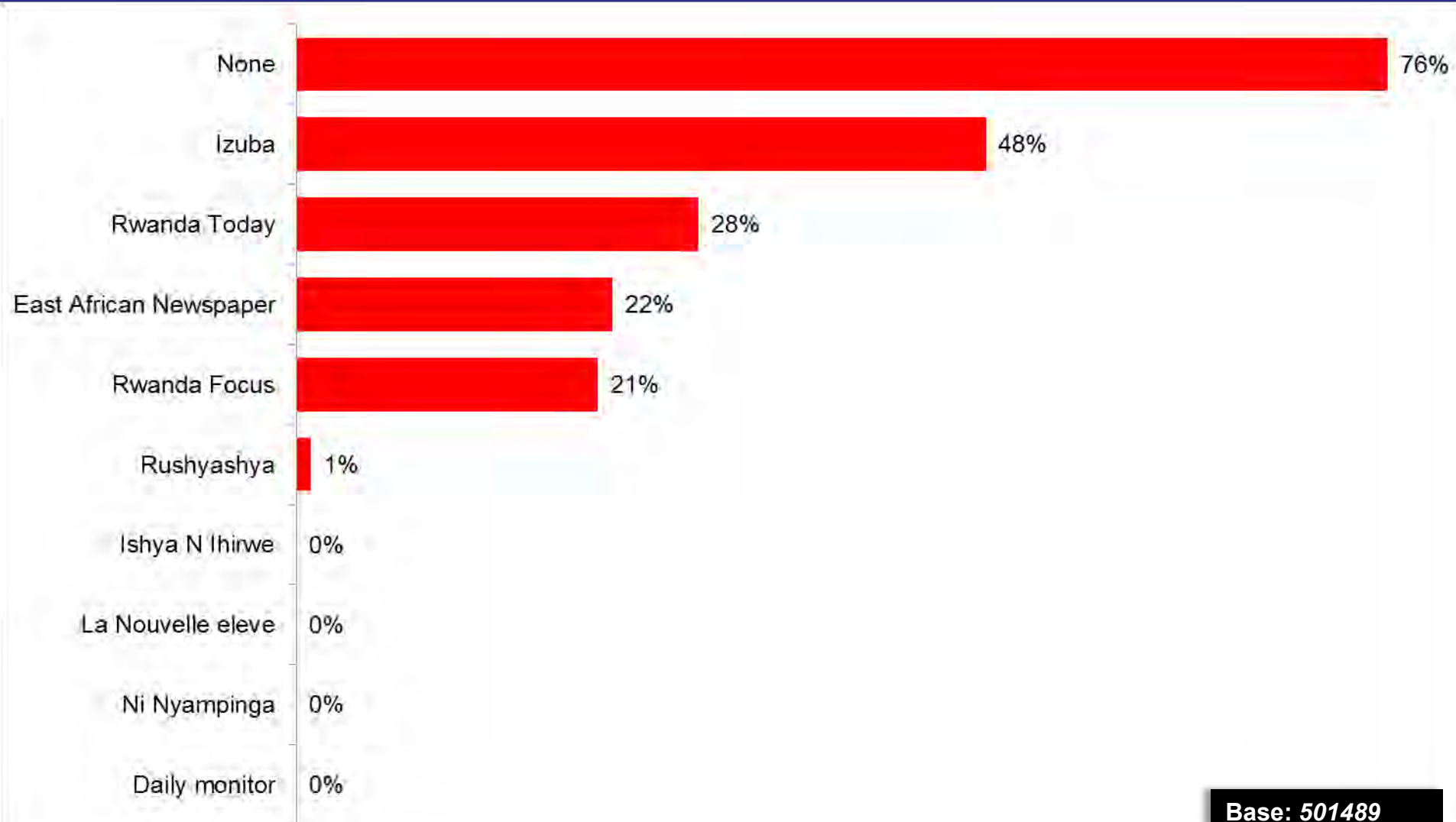
On average how often do you use internet?...

Base: 289,646(Those accessing the internet)

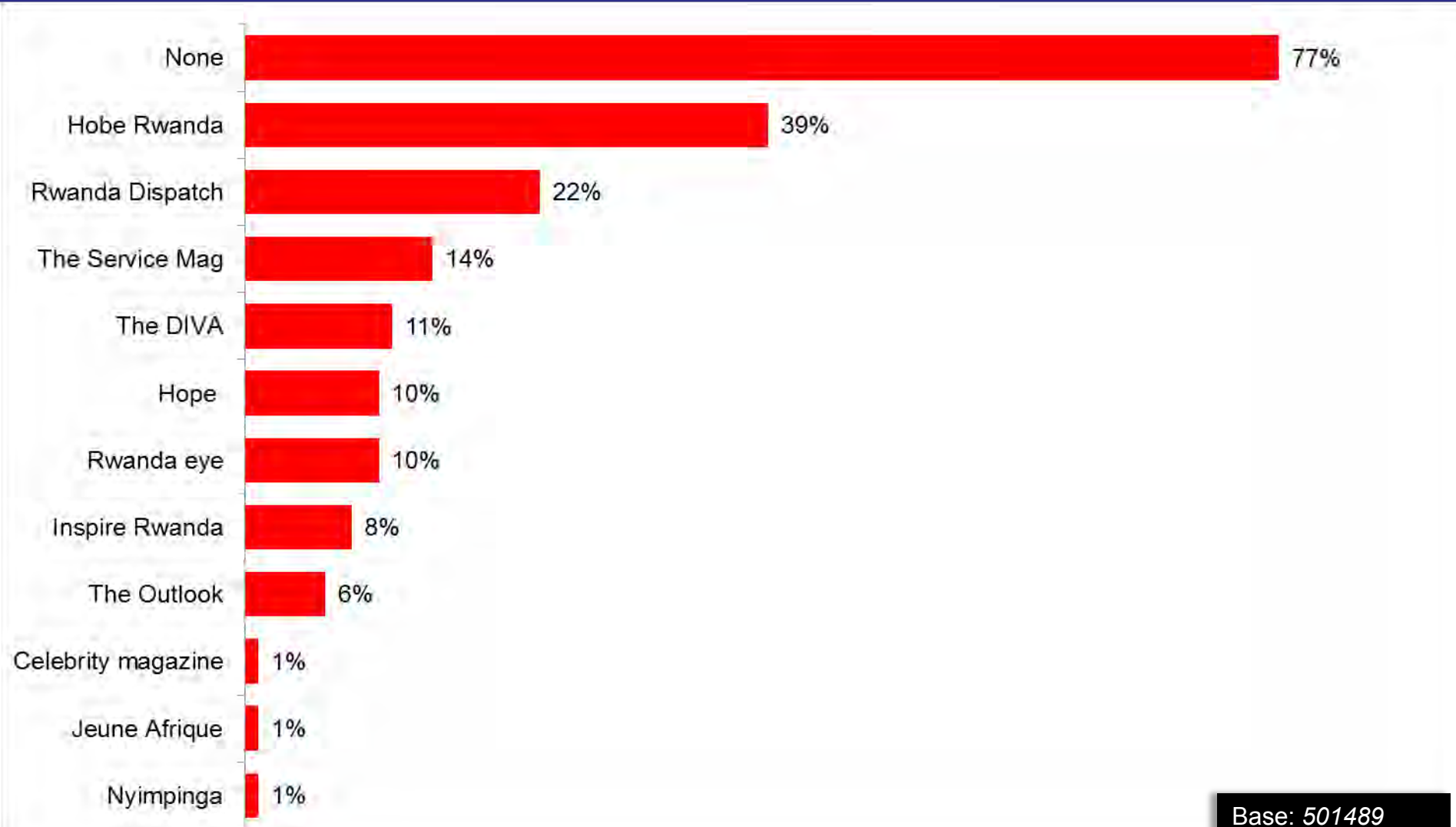
Daily Newspaper : Total Awareness



Weekly Newspaper : Total Awareness



Monthly or Quarterly Magazine: Total Awareness

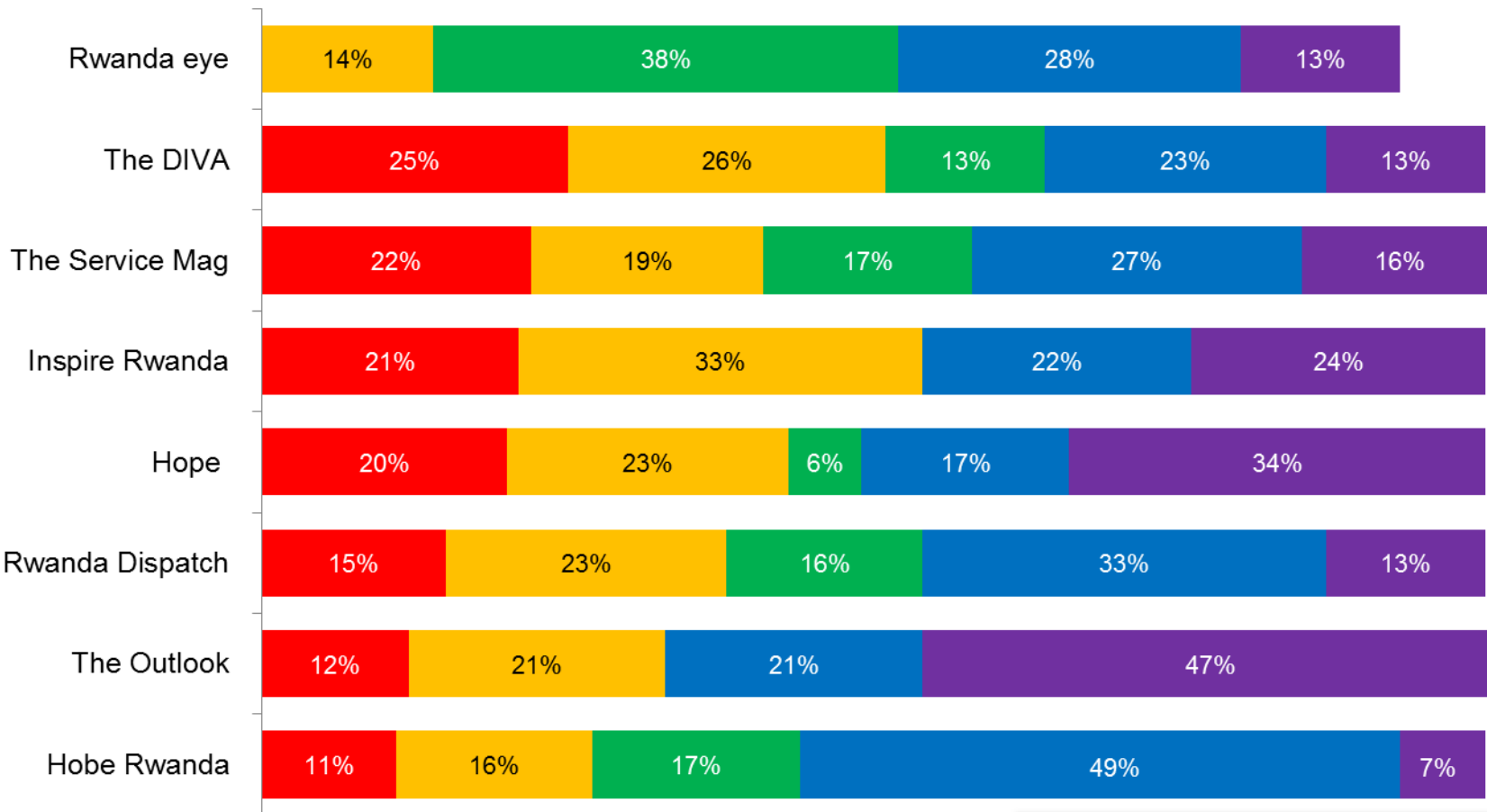




Monthly Magazine Readership

LAST TIME READ OR PAGED THROUGH A COPY OF?...

■ Past 4 weeks ■ 3 Months ■ 6 months ■ More than 6 Months Ago ■ DK/NR



Base: 159,978 (Persons aged 15 years and above)



Information Supplied by: Ipsos Tanzania



Country Overview

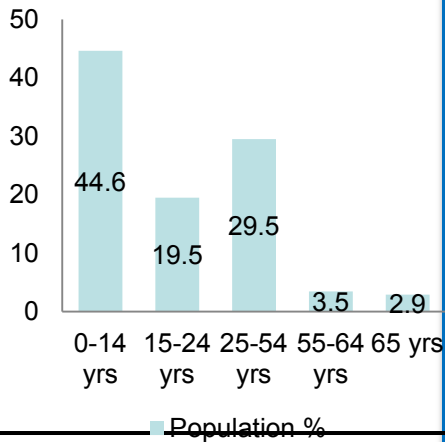


Basic Country Statistics	
	% or No:
Population (Million)	47.4
Urbanisation vs Rural	29.6% vs 70.2%
GDP growth rate in 2012	6.80%
% living below poverty line	33.60%
Literacy in adults over 15 years	73%
Administrative division	
No. of Television sets (millions)	6.4
No. of Radio sets	66%
No. of Languages	120
No. of Religions	2
Local currency	Tanzania Shillings
Exchange rate (US\$)	1955
Last censor (Year)	2012
Current Political Environment	
Current President	Jakaya Mrisho Kikwere
Ruling Party	Chama Cha Mapenduzi
No. of Cel Phones (millions)	32.013
No. of Landlines	151,274

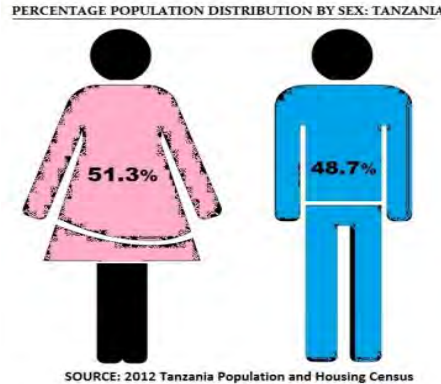
In late 2014 Tanzania's gross domestic product has expanded by 32 percent after the state rebased its calculation to incorporate new sectors in the economy, including big discoveries of natural gas:

COUNTRY STATS

AGE PROFILE



GENDER



SOURCE: 2012 Tanzania Population and Housing Census

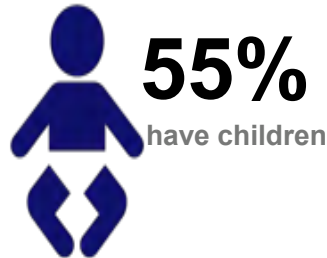
LANGUAGE

Kiswahili or Swahili (official),
Kiunguja (name for Swahili in Zanzibar),
English (official, primary language of commerce, administration, and higher education),
Arabic (widely spoken in Zanzibar), many local languages

BANKING

13.9% of population have and use bank products

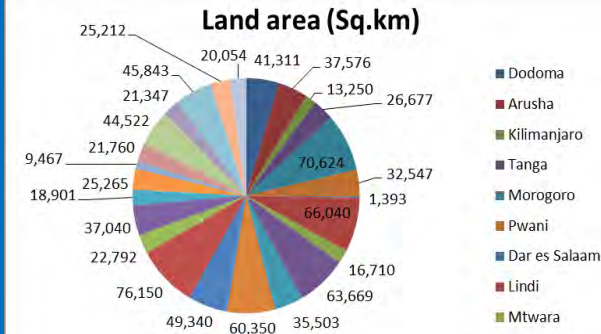
CHILDREN



LIFESTAGE

Status	%
Single/Never married	25.7
Polygamous married	3.8
Monogamous married	56.4
Divorced	2.8
Separated	3.1
Widowed	5.9

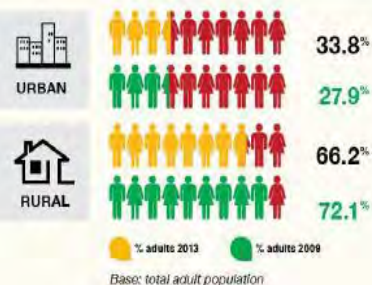
AREA BREAKDOWN



URBAN VS RURAL

DEMOGRAPHICS

Urban / Rural split across the country



EDUCATION



Primary education complete	57.57
Primary education not complete	8.03
Secondary education complete (Form 4)	12.87
Some secondary (Form 1-4)	8.43
No formal education	6.83
Complete university degree	0.9
Diploma complete	1.33
Others	3.9

MARITAL STATUS

Single: 25.7%
Married: 56.4%
Widowed: 5.9%
Divorced: 2.8%



COUNTRY STATS

INCOME

Main source of money

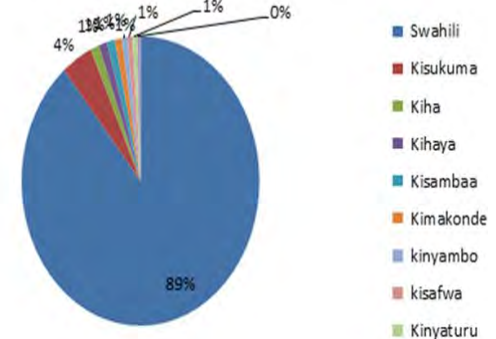


% adults 2013

Base: total adult population

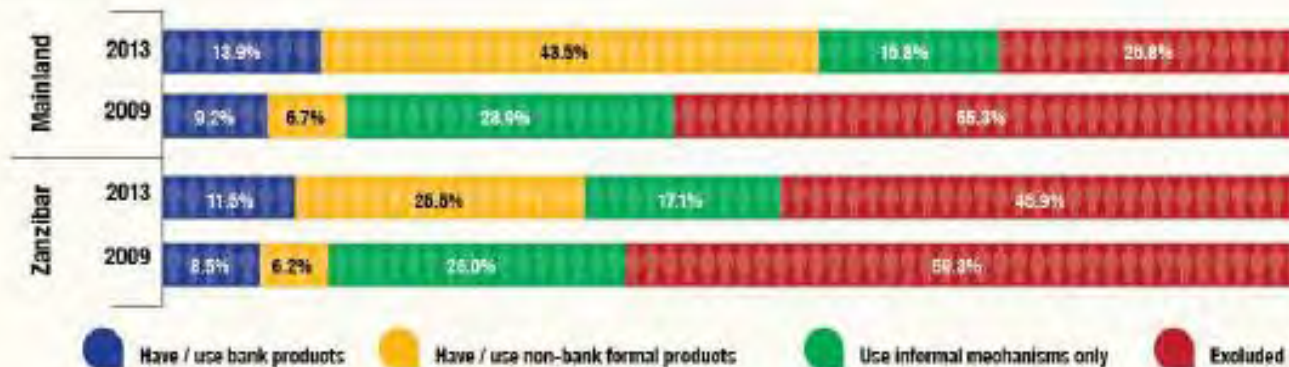
Nearly a quarter of the population (5,554,717) is dependent on others for their main source of income. The number of people whose main source of income comes from formal employment remains very low (1,099,612 or 4.5%).

Language spoken



ACCESS STRANDS

Access on the Mainland and Zanzibar



Base: total adult population

2009 charts have been recalculated using the 2013 definitions of the Access Strand

LSM BREAKDOWN

Total Media Population:
25,203,200

All Adults

LSM Group

2014 (5000)

LSM1-2

14% (682)

LSM3-4

40% (1994)

LSM5-7

21% (1040)

LSM8-11

21% (1062)

LSM12+

4% (223)

Overview

- ❖ Day After Recall
 - ❖ A weekly target sample of 700; 3,000 Monthly, 36,000 Annual
 - ❖ Target Respondents persons aged 15 years and above
 - ❖ Interviews administered over the phone
 - ❖ Contacts based on random list of respondents

Information Areas to be Covered

- ❖ Television / Radio Stations Watched Yesterday
- ❖ 15 Minute viewership / Listenership trends
- ❖ Media Activities
- ❖ Internet Access and usage
- ❖ Respondent Demographic information i.e. Age, Gender, Location, Social Economic Class, Education Level, Income level

IPSOS Tanzania

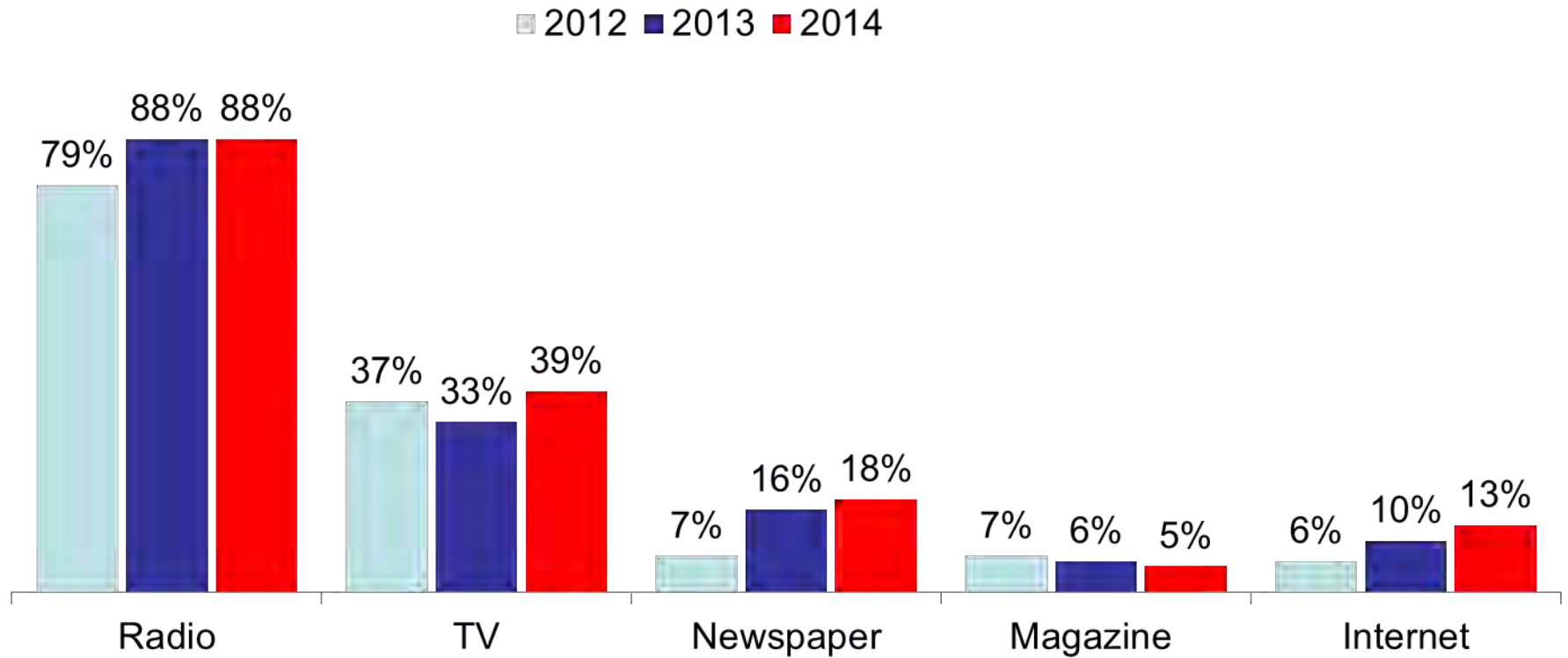
- Established 1998
- Office in Dar-Es Salaam
- 71 permanent staff
- Over 500 data collectors
- CATI, PAPI, MDC (297 devices)
- F2F, CLT, Omnibus, Mystery Shopping, B2B
- C.62k quantitative interviews conducted YTD 2013
- Qualitative; video link, simultaneous translation, 2 researchers



Day After Recall

Last Survey Released	2015
Type of Interview	Adults age 15+
Scope of Survey (Universe – Cities)	Urban and Rural Tanzania (National)
Media Covered Brands covered	Broadcast / Internet Usage
Survey Funding Cost of Survey	Self Funding
Next Survey	Month on month
Sample Size & Methodology	100 interviews per day

Media Overview - Media Reach



Media Overview - Channels & Media Reach

Medium	2011		2012		2013		2014	
	No of Stations	% Reach	No of Stations	% Reach	No of Stations	% Reach	No of Stations	% Reach
TV	7	%	7	%	8	%	3	%
Radio	8	%	8	%	27	%	27	%
Newspapers	8	%	8	%	8	%	9	%
Magazines	8	%	8	%	8	%	8	%
Cinema Screens	8	%	8	%	8	%	8	%
Outdoor Companies	21	%	21	%	21	%	21	%
Online	3	%	3	%	3	%	3	%
Mobile	4	%	4	%	4	%	4	%



MEDIA SPEND OVERVIEW/ UPDATE

Jan-Dec 2014

	TV	RADIO	PRINT	Spends in Tshs'000
COMMUNICATIONS	11,370,676	21,714,669	2,565,606	35,650,951
FINANCIAL SERVICES	4,786,732	12,782,209	5,765,902	23,334,843
CORPORATE AND MULTIBRAND	4,525,984	11,700,759	5,790,046	22,016,789
BEVERAGES	7,044,237	11,289,165	759,296	19,092,698
PHARMACEUTICALS	1,820,205	12,636,838	299,003	14,756,046
MEDIA	4,640,374	4,716,871	300,049	9,657,294
PUBLISHING AND EDUCATION	2,757,432	2,931,017	1,960,915	7,649,364
HOUSEHOLD	2,840,714	1,962,079	460,761	5,263,554
TRANSPORT	299,584	2,396,459	946,575	3,642,618
FOODS	1,122,963	1,166,594	38,018	2,327,575
TOURISM and ENTERTAINMENT	144,632	1,976,262	157,168	2,278,062
PERSONAL CARE	1,074,687	579,213	920	1,654,820
RETAIL	339,050	835,236	194,347	1,368,633
VETERINARY and AGRICULTURE	5,858	985,329	52,146	1,043,333
CLOTHING, FABRICS and FOOTWEAR	228,286	323,392	208	551,886
OFFICE EQUIPMENT and SERVICES	30,222	237,252	41,786	309,260
TOBACCO	0	930	39,565	40,495
SUPPLEMENTS and CONGRATULATIONS	0	0	5,461	5,461
SPENDS IN TSHS'000	43,031,636	88,234,274	19,377,772	150,643,682

Television consumption

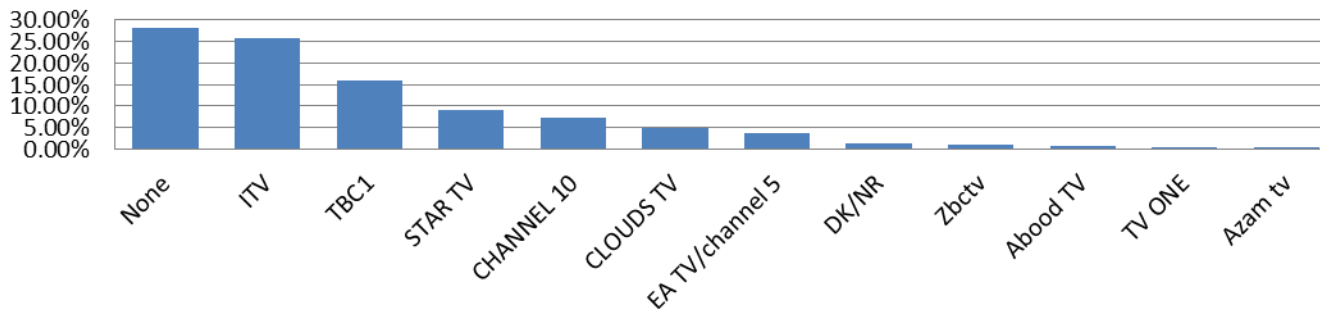


39%
Watch TV

TOP CHANNELS

ITV	74%
TBC 1	58%
STAR TV	50%
EA TV/CHANNEL 5	46%
CHANNEL 10	31%
CLOUDS TV	24%
TV 1/ONE	9%

TV spontaneous awareness



Base 25,203,200



Radio Consumption

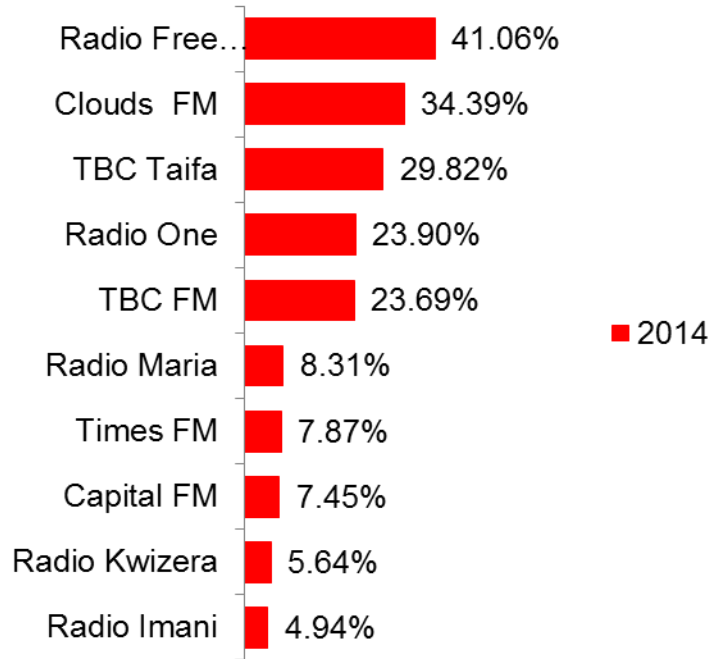


88%

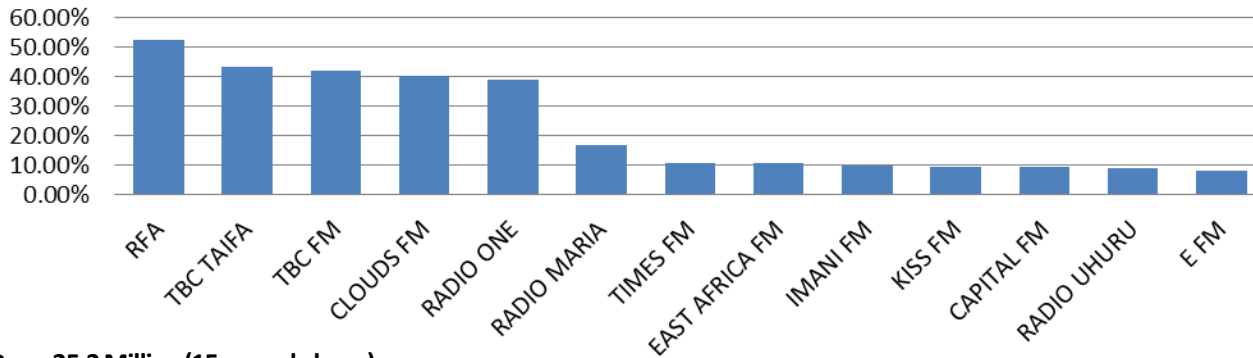
Listen to radio

TOP STATIONS

National



National radio awareness-Total survey area

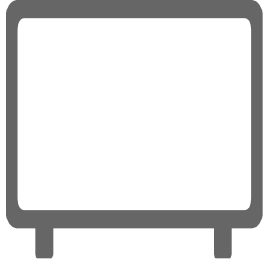


Base: 25.2 Million (15yrs and above)



Ooh Consumption

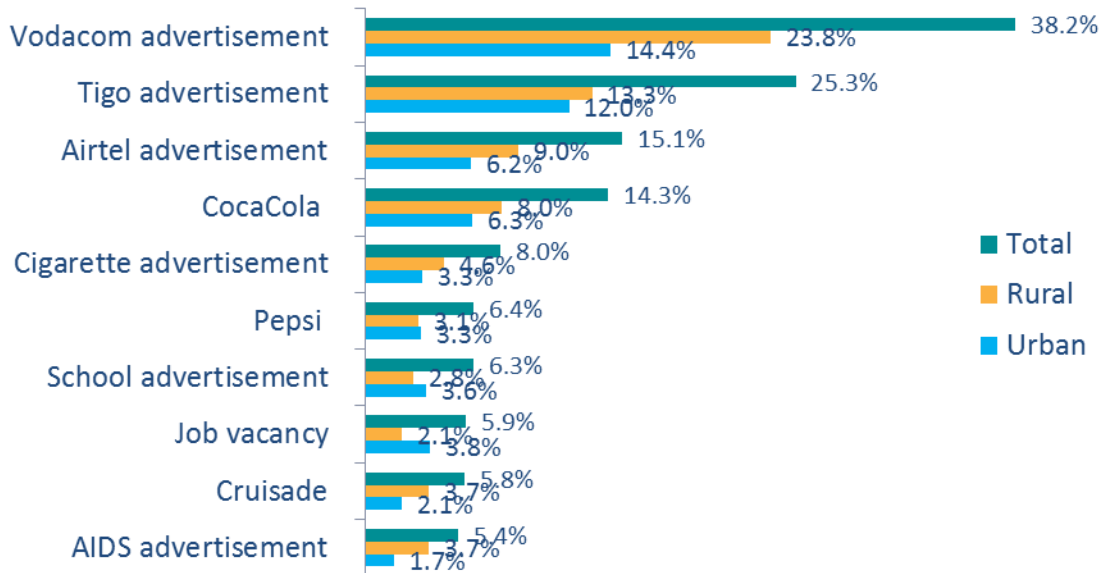
OOH



61%

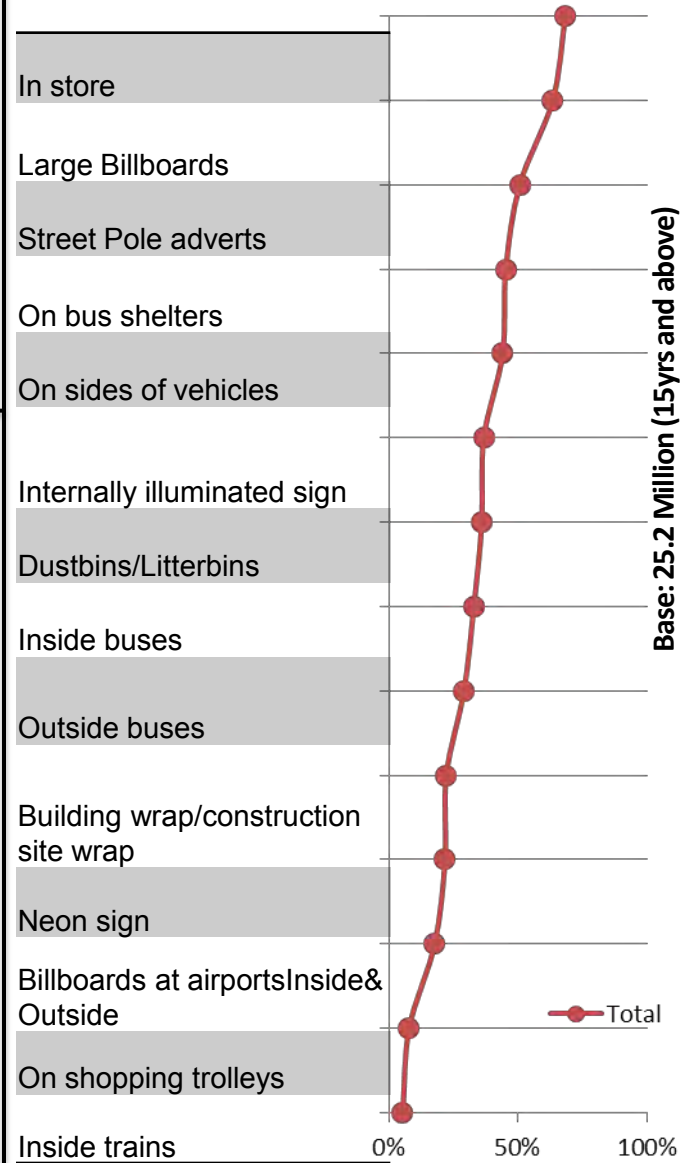
Are exposed to OOH

Ad Message Recall



Base: 17.2 Million (15yrs and above)

Ad Recall top formats



Base: 25.2 Million (15yrs and above)

Mobile/digital consumption

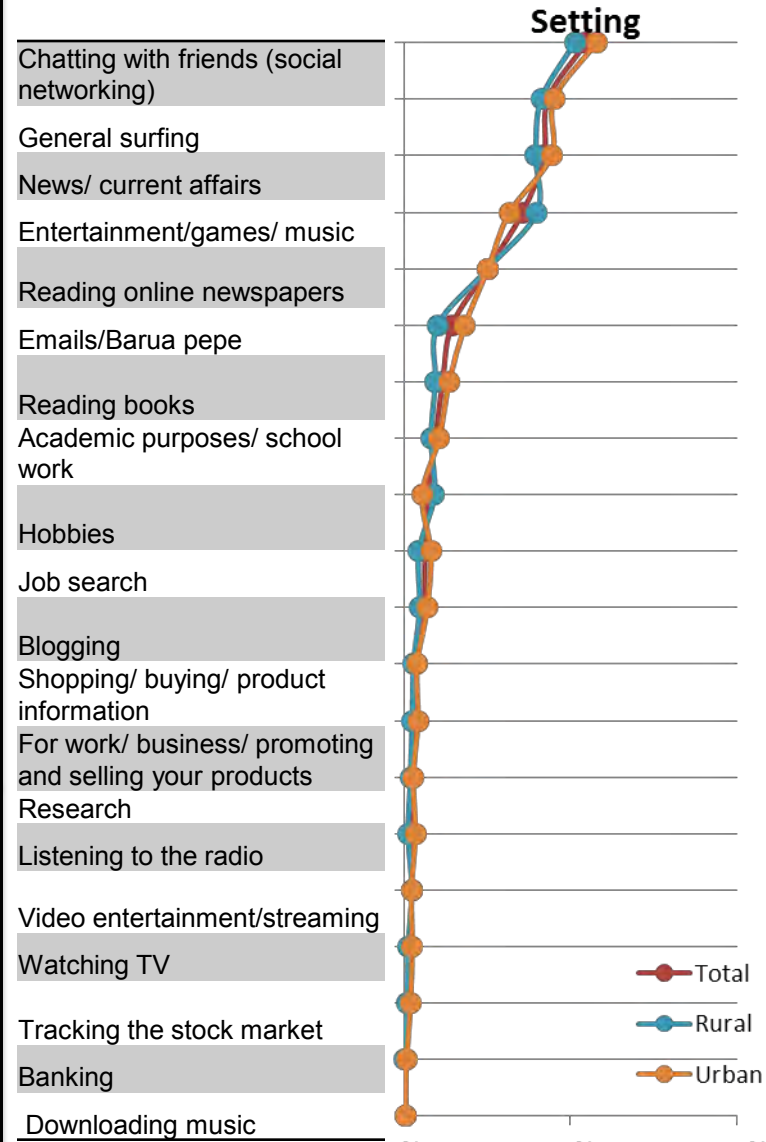
2014	
Chatting with friends (social networking)	55%
General surfing	44%
News/ current affairs	43%
Entertainment/games/ music	35%
Reading online newspapers	26%
Emails	15%
Reading books	12%
Academic purposes/ school work	10%
Job search	7%

INTERNET ACTIVITY VIA CELL PHONE

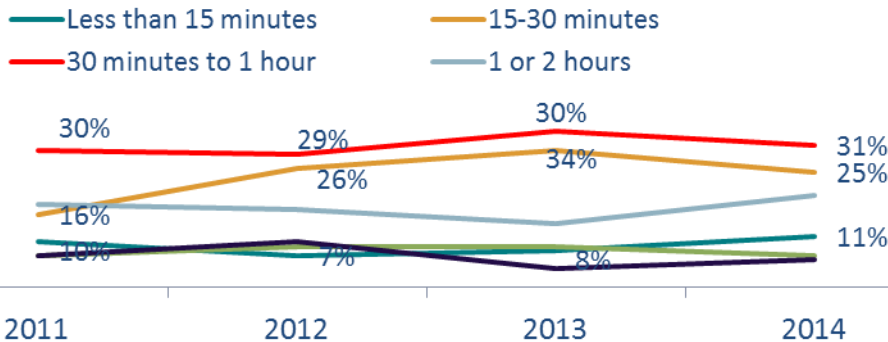


Accessed Internet
P4W: 13%

INTERNET ACTIVITY



How much time do you spend on internet



Print Consumption

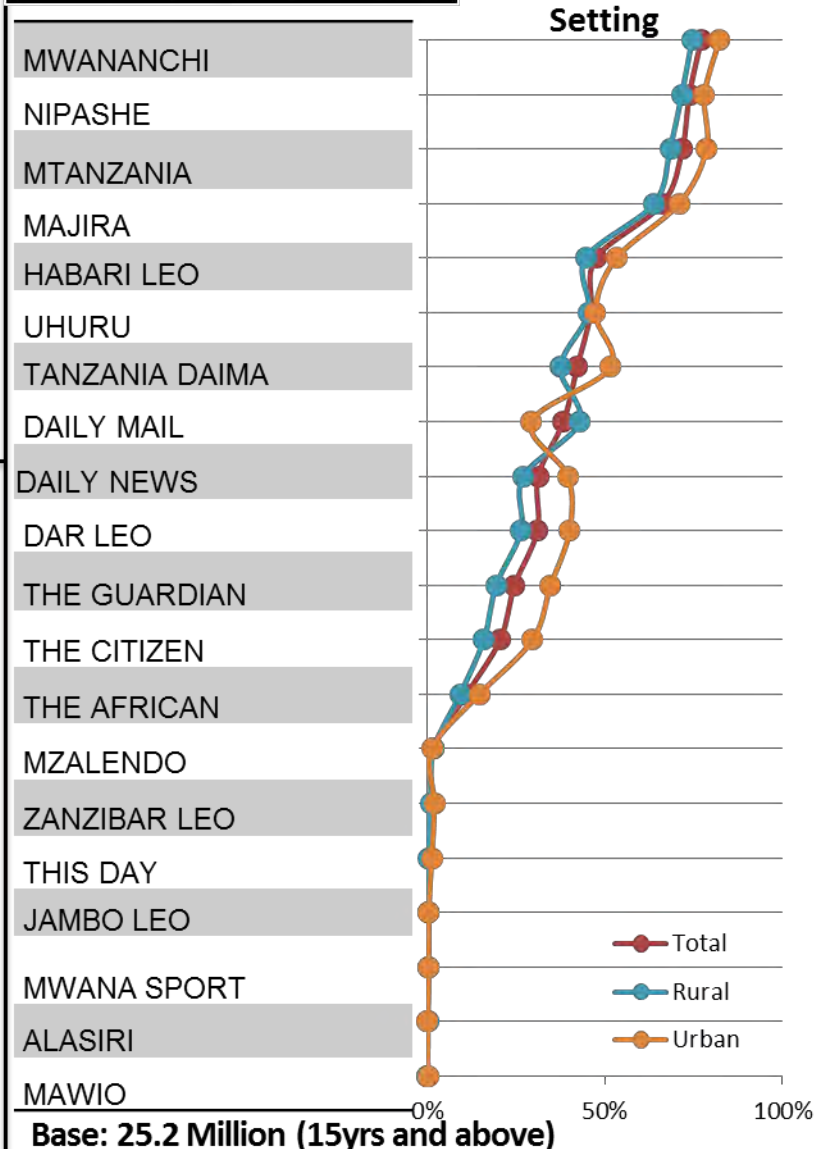


18%
Have read Newspapers

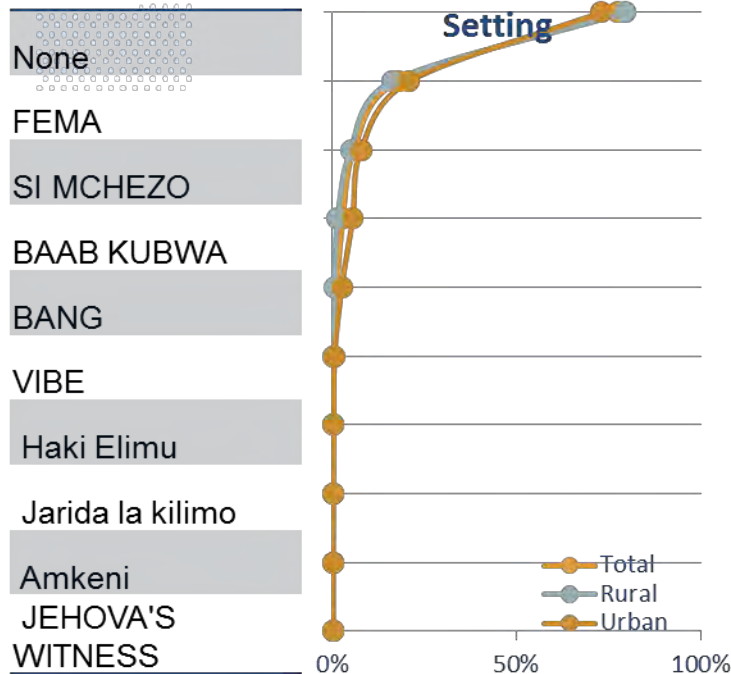
5%
have read Magazines

PRINT / PRESS

Top Daily newspapers awareness



Magazines Awareness



The image features a stylized graphic of the South African flag. On the left, a large chevron shape is composed of green, yellow, and black stripes, pointing towards the center. This chevron is set against a background of horizontal stripes: red at the top, white in the middle, and blue at the bottom. The text 'SOUTH AFRICA' is centered on the white stripe.

SOUTH AFRICA

Information Supplied by: SAARF



Country Overview



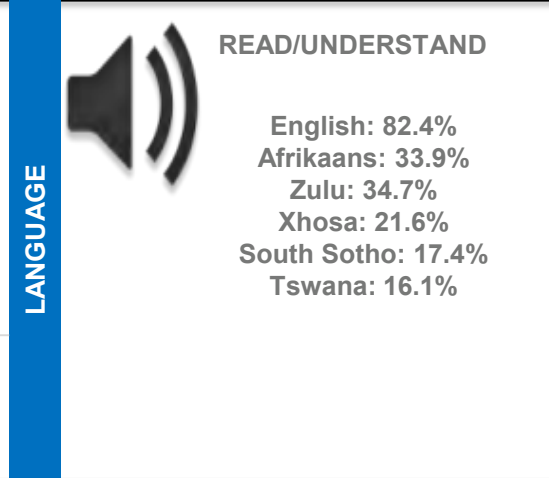
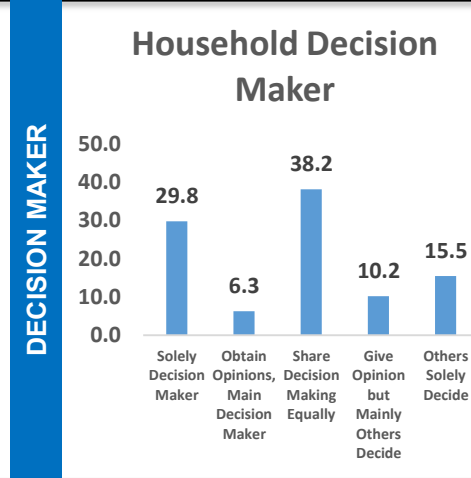
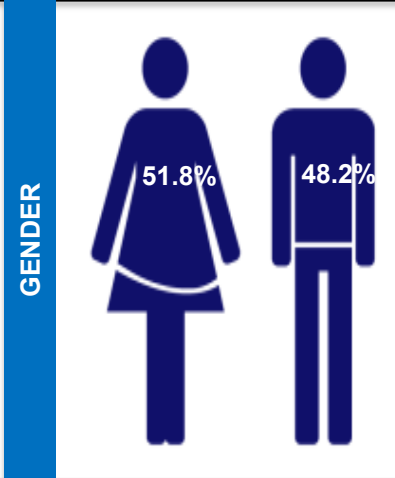
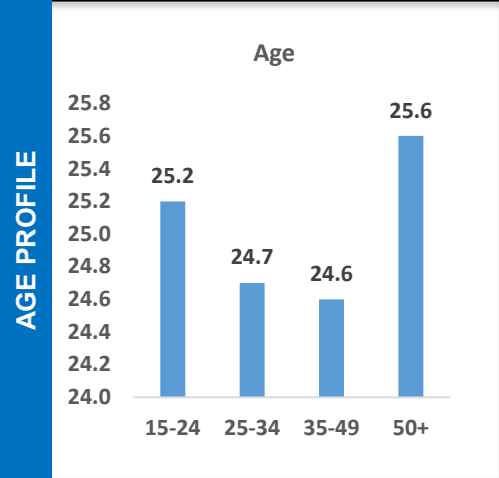
Legislation changes 2014:

South Africa tightened immigration rules in May 2014

Basic Country Statistics	
	% or No:
Population	37 665 000
Urbanisation vs Rural	64.4% Urban; 35.6% Rural
GDP growth rate in 2015	2.3% (IHS Information and Insight)
% living below poverty line	45.8% (IHS Information and Insight)
Literacy in Adults over 15yrs	99% (AMPS Dec14)
% of population below 15yrs	16 241 924 (IHS Information and Insight)
No. of Television Sets	88.9% (AMPS Dec14)
No. of Radio Sets	86.9% (AMPS Dec14)
No. of Languages	11 Official Languages
No. of Religions	All religions are measured on AMPS; the majority claim to be Christians (AMPS Dec14)
Local Currency	South African Rand
Exchange Rate (US\$)	1US\$ = R12,03 (27 May 2015)
Latest Census (Year)	2011
Current Political Environment	
Current President	Jacob Zuma
Ruling Party	ANC
No. Of Cell Phones	35 954 000 cellphones in households (AMPS Dec14)
No. Of Landlines	8.3% (AMPS Dec14)

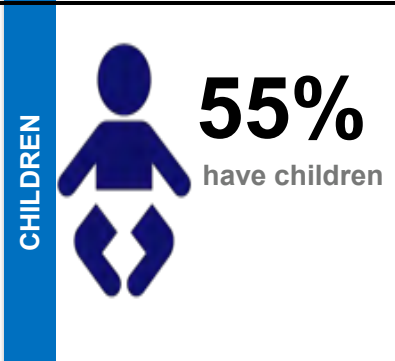
COUNTRY STATS

TOTAL UNIVERSE SIZE
37,665,000



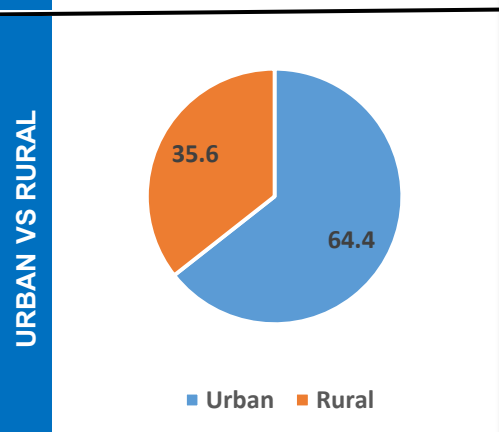
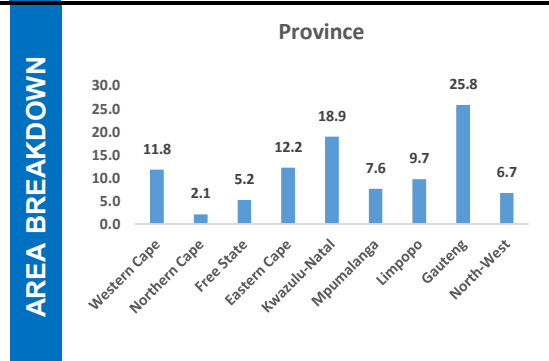
BANKING

Have an account with a registered bank
66.1% (24,896 000)



LIFESTAGE

- Young Independent singles: 10.1%
- Mature singles: 14.3%
- Young couples: 5.9%
- Mature couples: 8.7%
- Young family: 16.4%



EDUCATION

- Matric: 32.5%
- Technikon: 6.2%
- Post Matric: 4.9%
- University: 3.5%

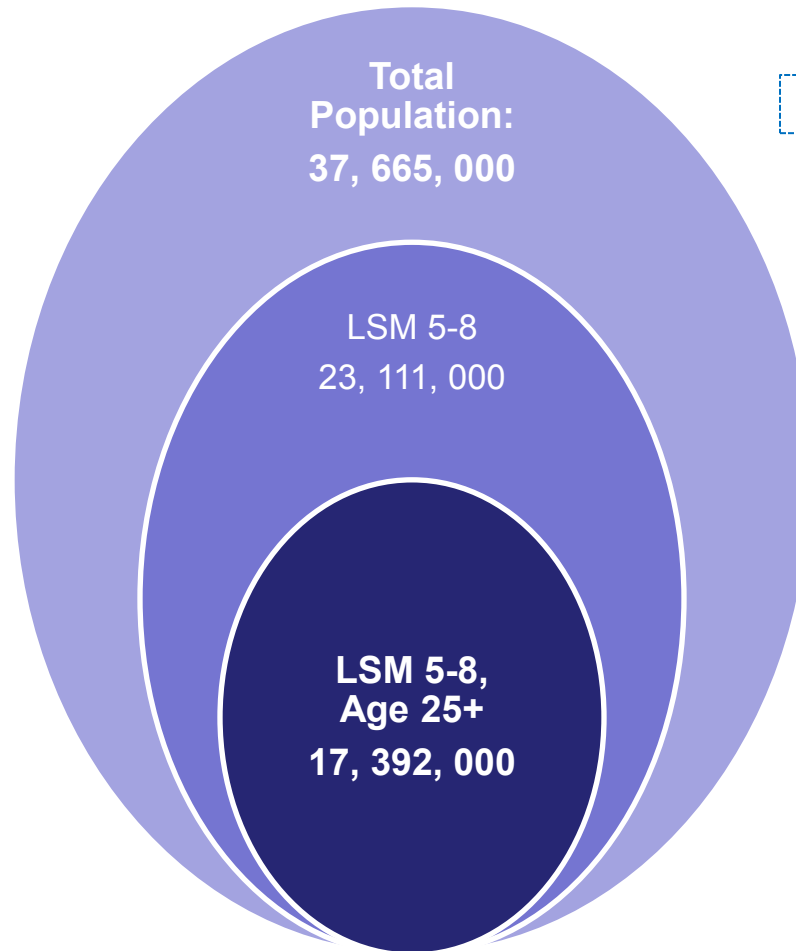
EMPLOYMENT

- Work Full Time: 27.8%
- Student: 15.6%
- Unemployed: 30.4%
- Self employed: 8.2%
- Retired: 11.2%

MARITAL STATUS

- Single: 53.8%
- Married: 35.5%
- Widowed: 7.9%
- Divorced: 1.7%

LSM BREAKDOWN



All Adults 15+

AMPS Dec14
(Jan-Dec 2014)

Country Research Company

Research Company: Nielsen South Africa

Information Available:

AMPS

RAMS

TAMS

Country Research

AMPS

RAMS

Last Survey Released	December 2014 (Large Urban: January-December 2014) (Small Urban/Rural: January-December 2014)	Last Survey Released	February (2014 Release 6 of 6)
Type of Interview	DS-CAPI and self completed questionnaires	Type of Interview	Self completion diary
Scope of Survey (Universe – Cities)	Adults 15+, National	Scope of Survey (Universe)	Adults 15+, Large Urban (August-December 2014) and Small Urban/Rural (January-June 2014)
Media Covered Brands covered	Cinema, Print, TV, Radio, Outdoor, Internet, & Cellphone. Approx 1500 FMCG Brands	Media Covered Brands covered	All licensed stations (incl. community)
Survey Funding Cost of Survey	Funded by Industry	Survey Funding Cost of Survey	Funded by Industry
Next Survey	September 2015	Next Survey	June 2015 (Release 1 of 2015)
Sample Size & Methodology	N= 25 584 and they are interviewed face to face	Sample Size & Methodology	N=25 164 and they fill in a radio diary For 7 days

Media Overview - Channels & Media Reach

Medium	2011		2012		2013		2014	
	No of Stations	% Reach	No of Stations	% Reach	No of Stations	% Reach	No of Stations	% Reach
TV (P7D)	171	90.8%	175	91.5%	199	91.7%	309	92.3%
Radio (P7D)	205	92.7%	228	92.6%	240	92.5%	258	92.3%
Newspapers (AIR)	53	48.9%	53	49%	54	47.8%	52	45.9%
Magazines (AIR)	148	50.5%	148	46.9%	130	47.6%	123	46.5%
Cinema (P7D)	2	1.2%	2	1%	2	1%	2	0.8%
Outdoor Companies (P7D)	N/A	88.1%	N/A	88.7%	N/A	87.4%	N/A	87.1%
Online (P7D)	N/A	17%	N/A	21.5%	N/A	26.9%	N/A	38.6%
Mobile (P7D)	4	81.8%	5	84.6%	5	N/A	5	N/A%

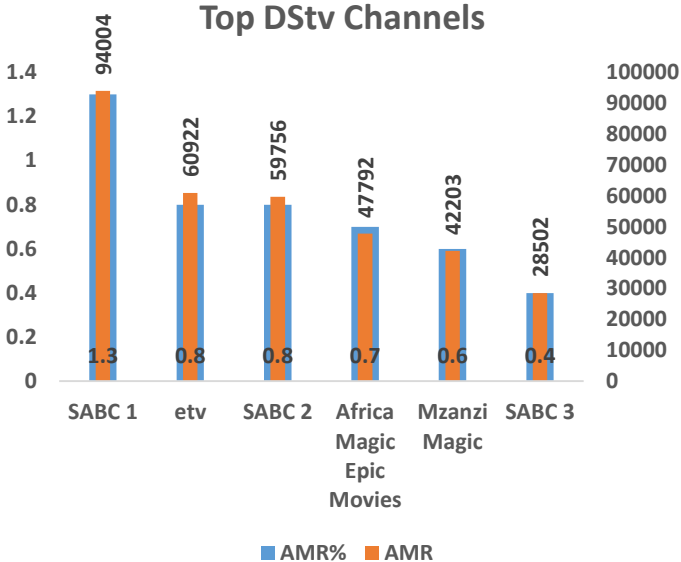
Television Consumption

TELEVISION

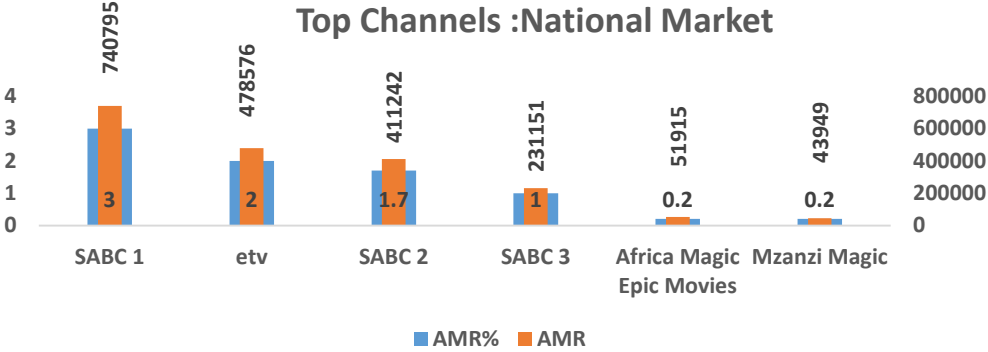


92.3%
Watched TV in 2014
(AMPS
Jan-Dec 2014)

TOP STATIONS



Source: TAMS Jan-Dec 2014 (15+ adults)



Source: TAMS Jan-Dec 2014 (15+ adults)



Radio Consumption- RAMS 6 of 2014

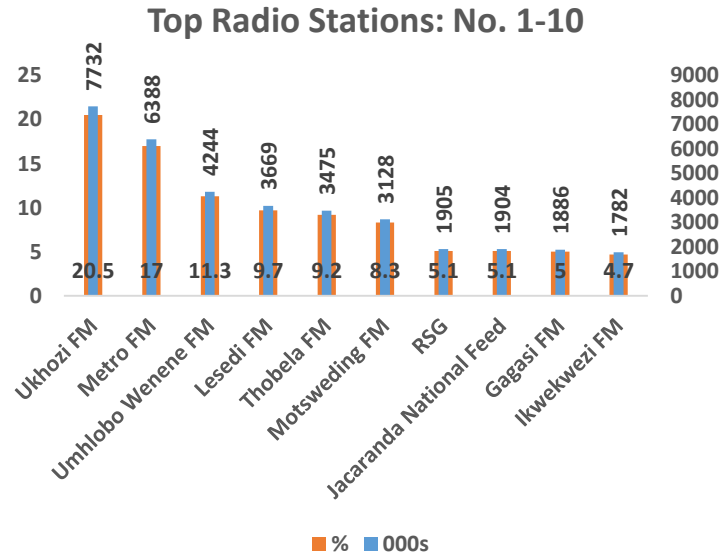
RADIO



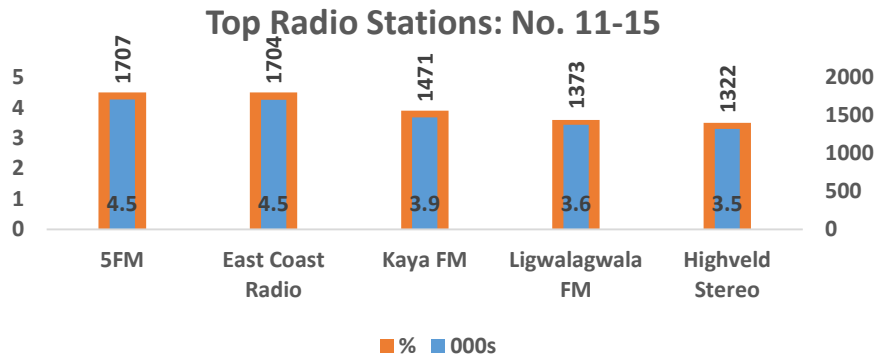
87%

Listen to radio

TOP STATIONS

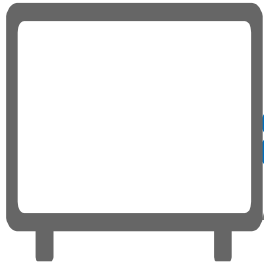


Source: RAMS (6)
(Aug-Dec 2014)



OOH Consumption

OOH

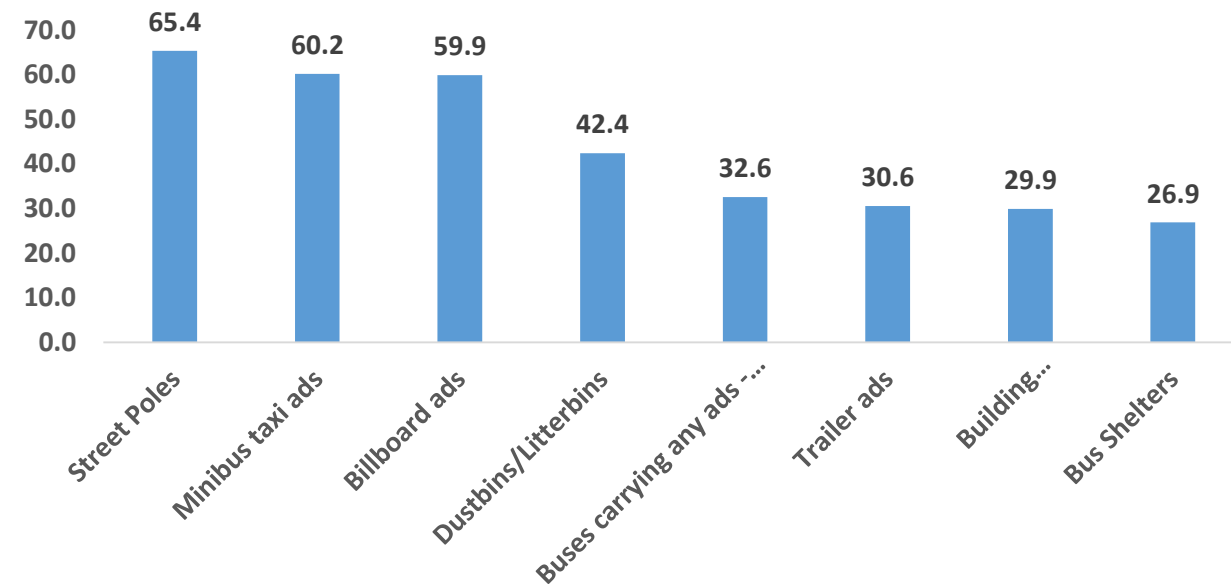
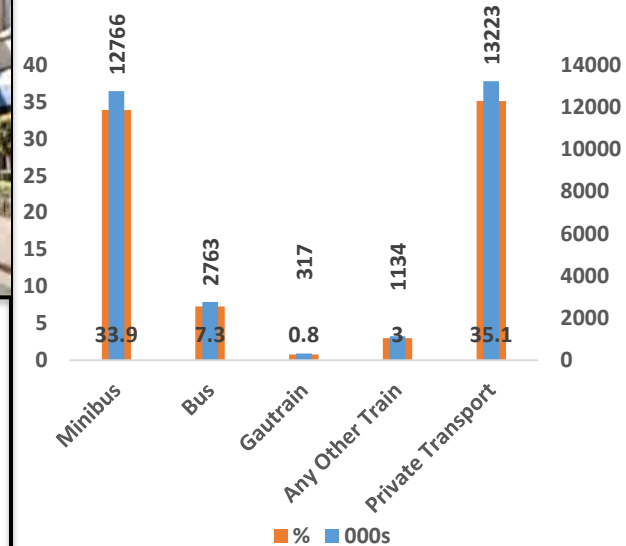


87.1%

Are exposed to
OOH
(P7D)



Mode of Transport -Weekly



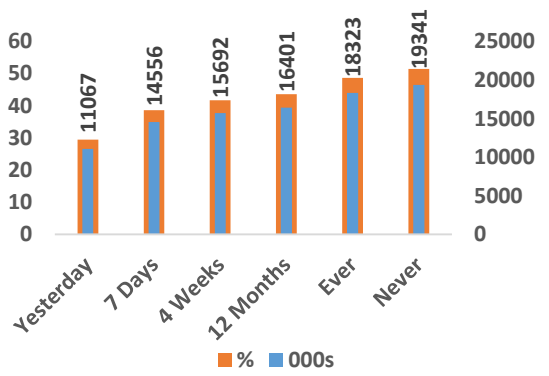
Source: AMPS Dec14
(Jan-Dec 2014)

Mobile/Digital Consumption

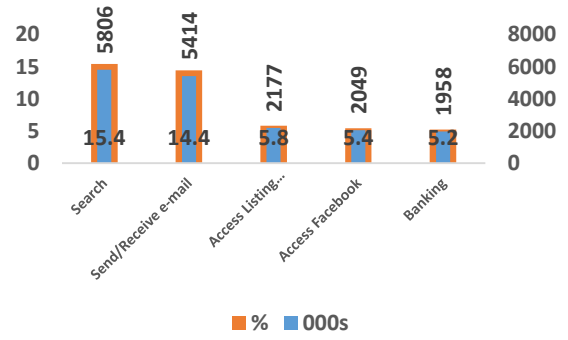
DIGITAL

MOBILE

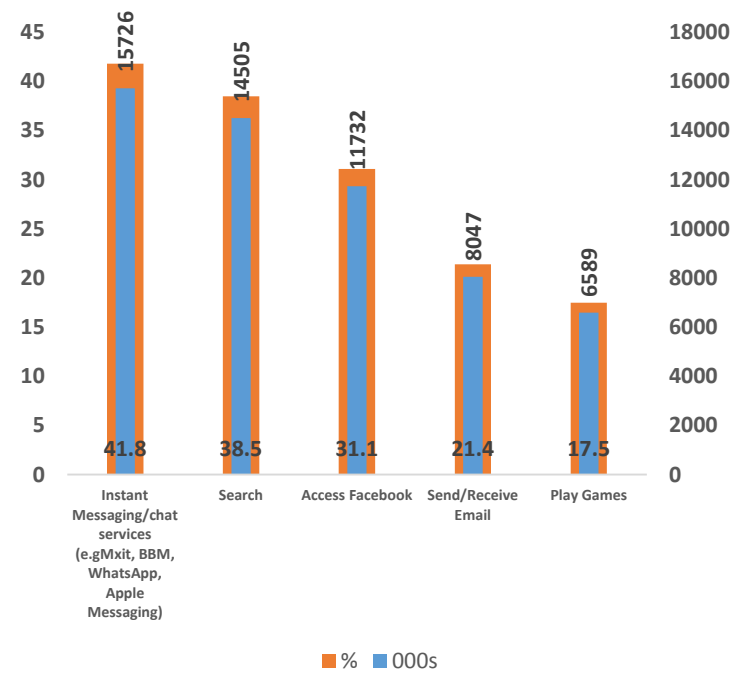
Internet Usage



Top Internet Activities via Computer/Tablet



Internet Activities via Cellphone



88.9% have a cell phone

47.8% have a smartphone



Print Consumption

PRINT / PRESS

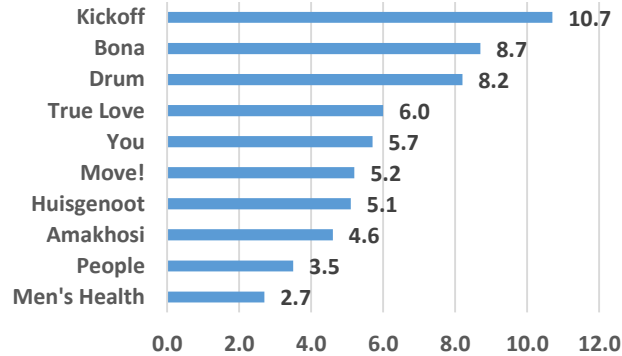


46.5%

Have read
Magazines

TOP TITLES

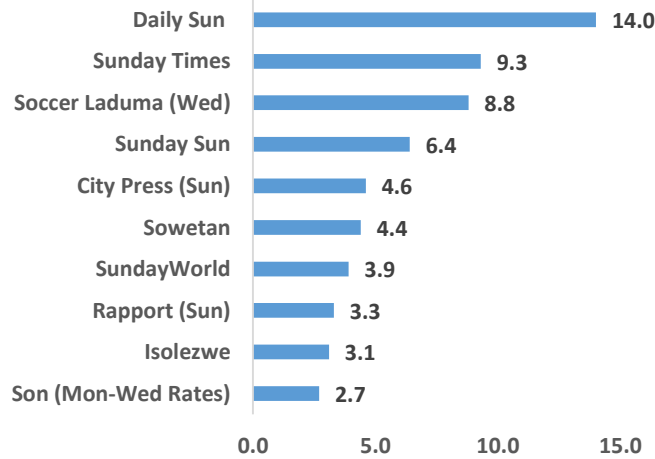
Top 10 Magazines



45.9%

Have read
Newspapers

Top 10 Newspapers



Source: AMPS Dec14
(Jan-Dec 2014)



Ipsos Zambia

Information Supplied by: Raymond Chongo - Ipsos

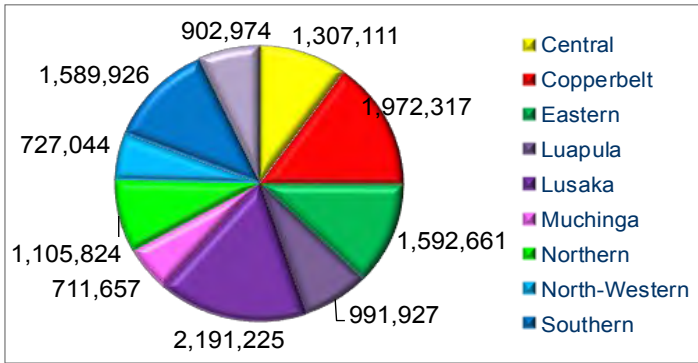


Country Overview

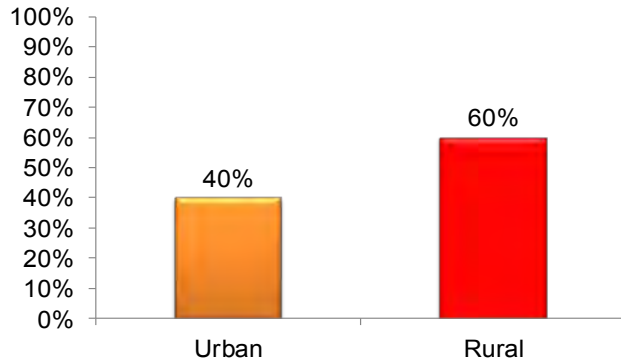


Population	13,092,666
Rural	60%
GDP growth 2010	7.6%
% living below poverty line	61%
Literacy 15+ year olds	61.4%
% population less than 15	45.4%
Provinces	10
TV penetration (HH)	63%
No Radios	3,116,373
Mobile penetration	91%
Fixed line penetration	0.6%
Internet used last week	22%
No Languages	73
No Religions	6 main
Currency	Kwacha
Exchange rate (USD)	7.4
President	Edgar C. Lungu
Ruling Party	Patriotic Front

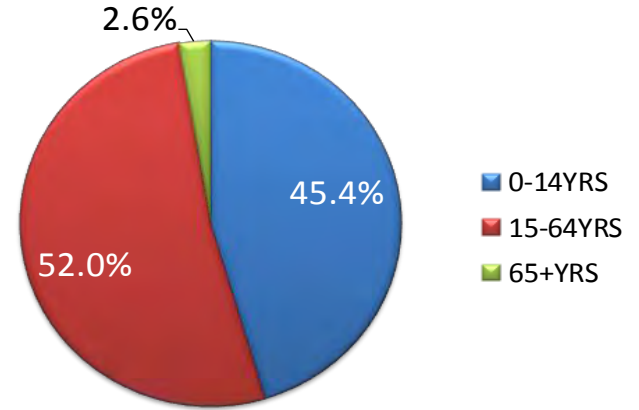
Country Statistics



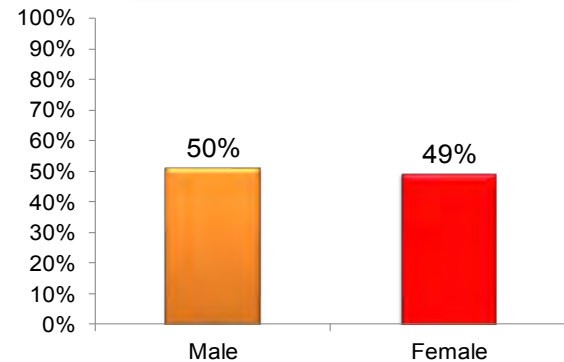
AREA



**RURAL /
URBAN**

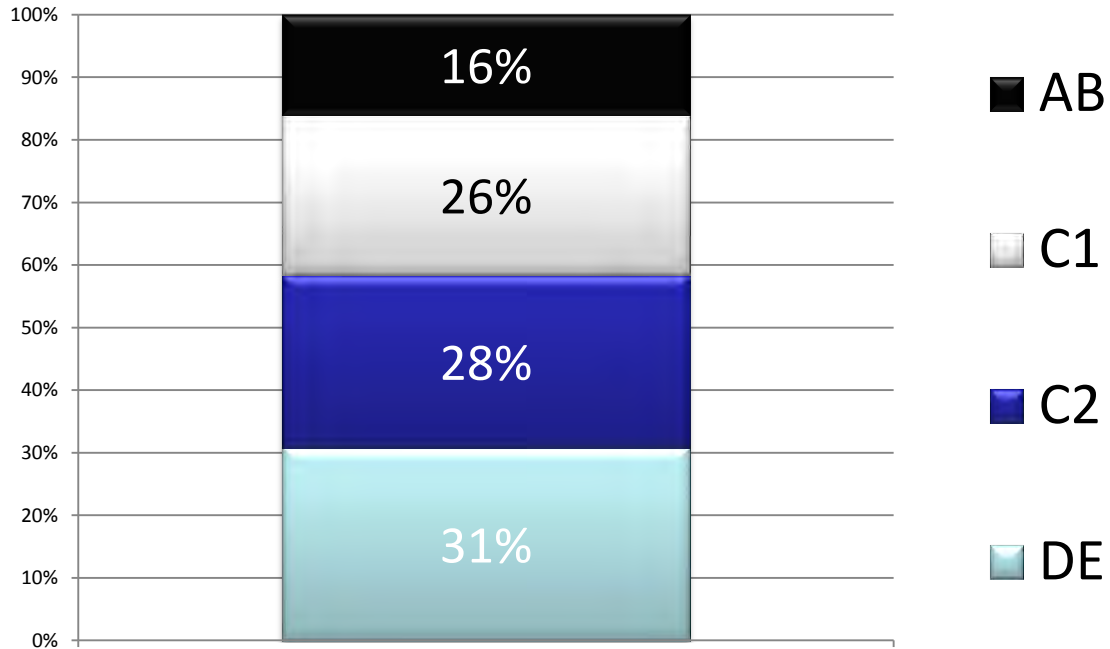


AGE



GENDER

Country Statistics cont...



SEC'S



Country Research Company

- Ipsos Zambia carried out a ZAMPS study countrywide in 2014
- Cost of each client to buy the data **USD 5,000**
- What is available:
 - Diaries
 - AMPS
 - Competitive research
- Top 5 Clients/agencies who bought data so far:
 - ZNBC
 - Airtel
 - Barclays
 - Radio Phoenix
 - BBC Action

ZAMPS

Media Diaries

Last Survey Released	2014	Last Survey Released	2014
Type of Interview Sample Size	2000 Adults age 15+	Type of Interview Sample Size	2,000 Adults, aged 15+
Scope of Survey (Universe)	Urban and Rural Zambia	Scope of Survey (Universe)	Urban and Rural Zambia
Media Covered Brands covered	TV, Radio, Newspapers, Magazines, Outdoor, Internet	Media Covered Brands covered	TV, Radio, Newspapers, Magazines
Survey Funding Cost of Survey	Multiple clients	Survey Funding Cost of Survey	Multiple clients
Next Survey	2016	Next Survey	2016



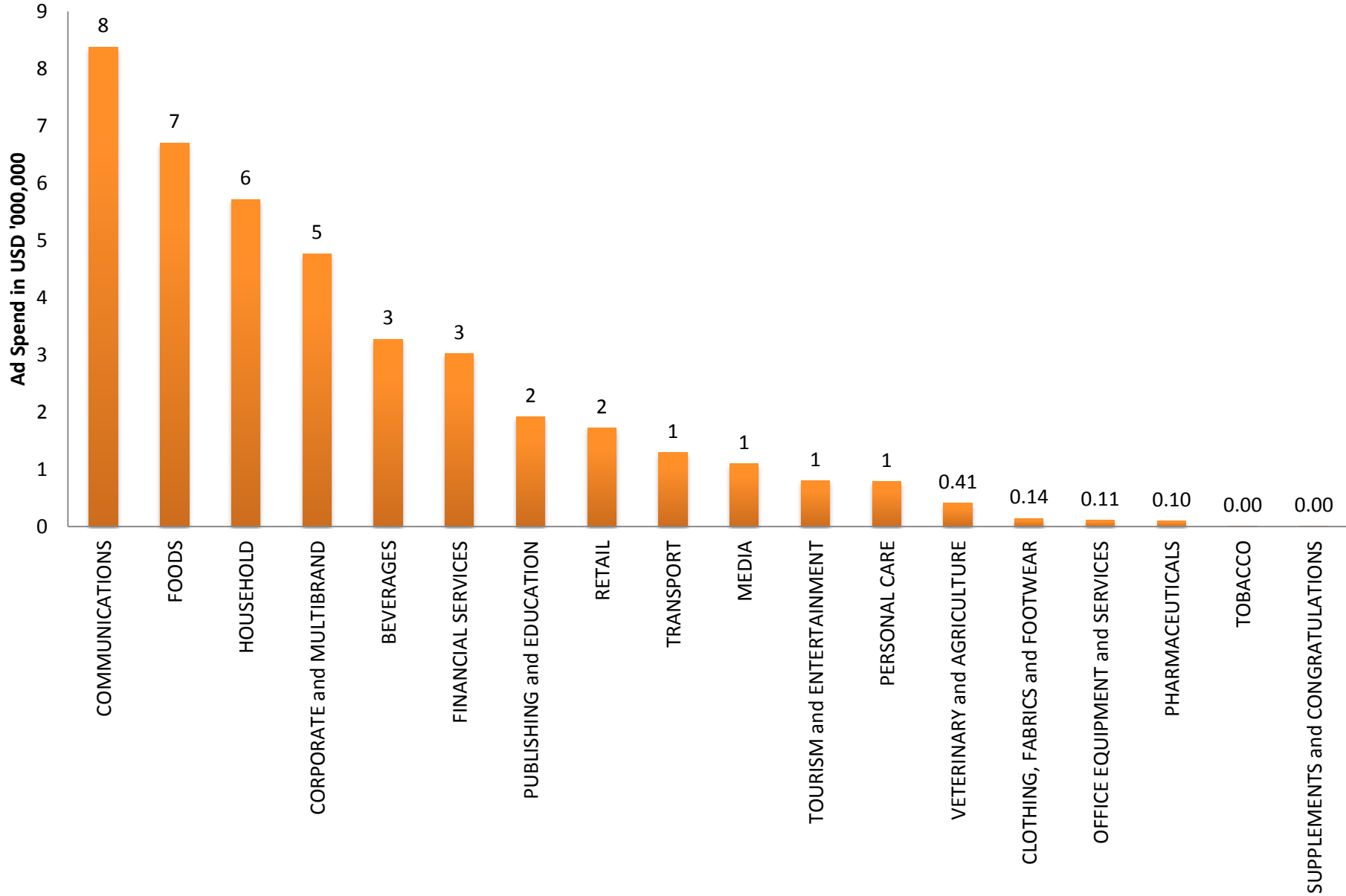
Media Overview - Channels & Media Reach

Medium	2011		2014	
	No of Stations	% Reach	No of Stations	% Reach
TV	10	71%	15	69%
Radio	29	77%	45	75%
Newspapers	9	38%	10	35%
Magazines	6	17%	20	22%
Cinema Screens	3	2%	3	3%
Outdoor Companies	?	49%	?	44%
Online	?	12%	?	22%
Mobile	3	81%	3	77%

% Past Week



2014 Category Ad Spend



MEDIA OVERVIEW/ CELLULAR

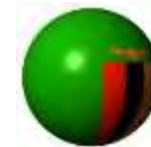


Mobile penetration	91%
Fixed line penetration	0.6%

Mobile Networks Currently Using:

MTN	61%
Airtel	53%
Zamtel	18%
None	9%

MEDIA OVERVIEW/ ONLINE



- 17% accessed the internet yesterday and a further 5% had done so in the last week: Net 22% accessed in last week.

How access?

Mobile phone	90%
Laptop	20%
Desktop computer	12%
Ipad/ other tablet device	4%

How much each day?

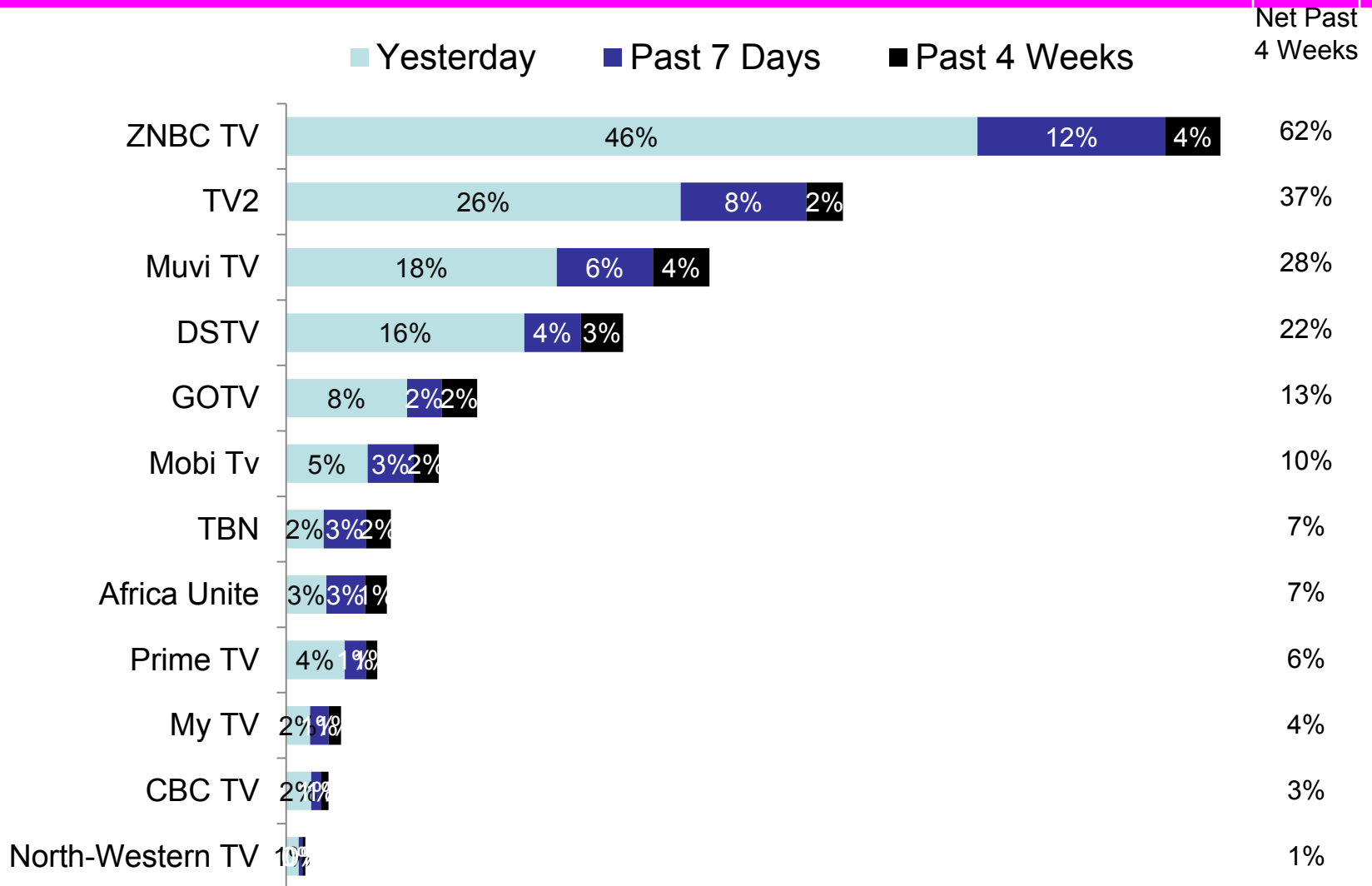
Less than 15 minutes	14%
15 minutes to 30 minutes	22%
30 minutes to 1 hour	23%
1 or 2 hours	20%
2 to 3 hours	9%
More than 3 hours	12%

What doing?

Chatting with friends (social networking)	58%
Entertainment/ games/ music	42%
Research	34%
News/ current affairs	30%
Academic purposes/ school work	24%
Sending SMS	22%
General surfing	21%
Emails	17%
Reading online newspapers	17%
Reading books	15%
Video entertainment/ streaming	13%
Job search	13%
Shopping/ buying/ product information	7%
For work/ business/ promoting and selling your products	7%
Listening to the radio	5%
Watching TV	5%
Skype	5%
Tracking the stock market	4%
Banking	4%
Blogging	3%

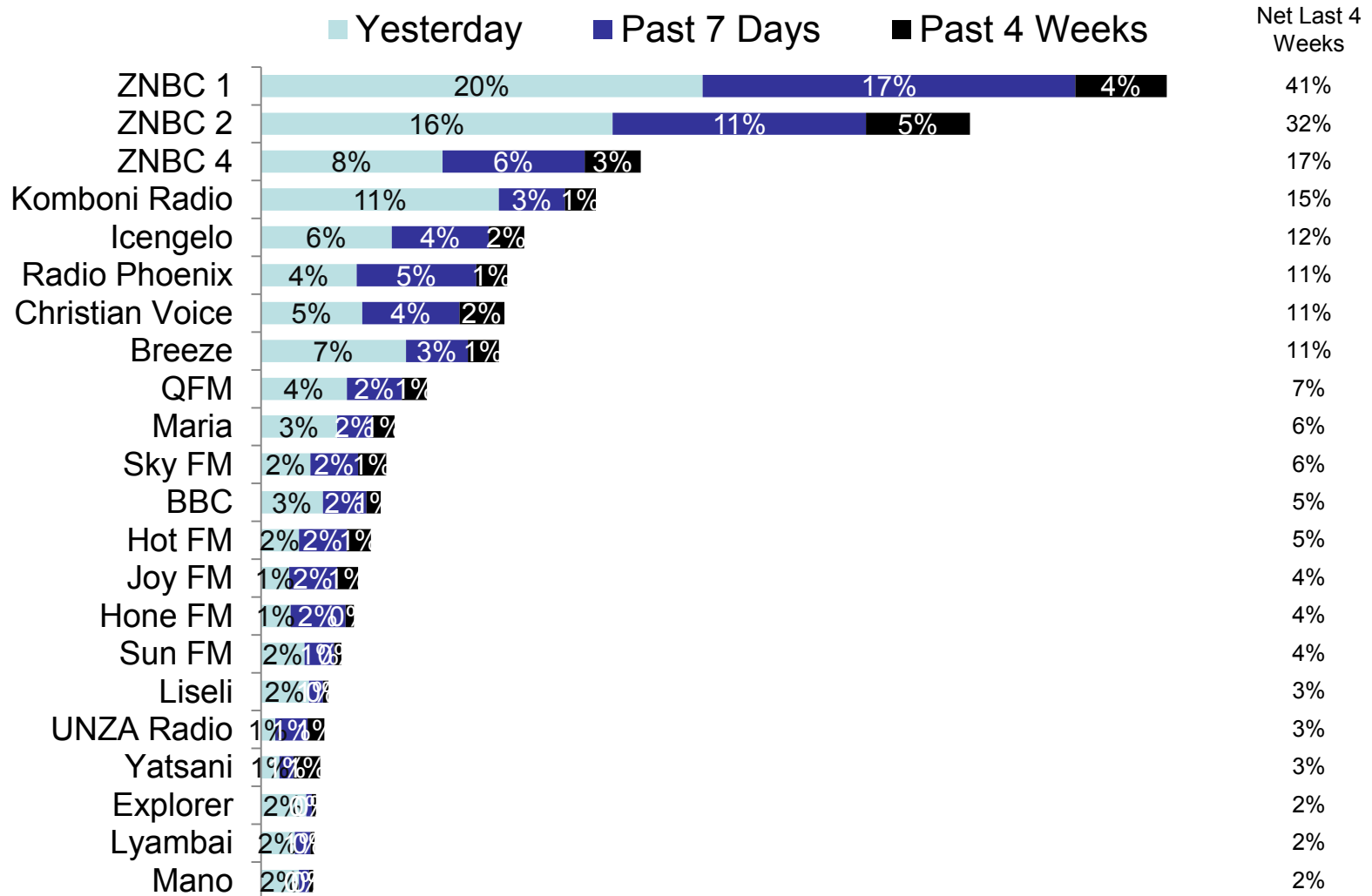


Television Breakdown

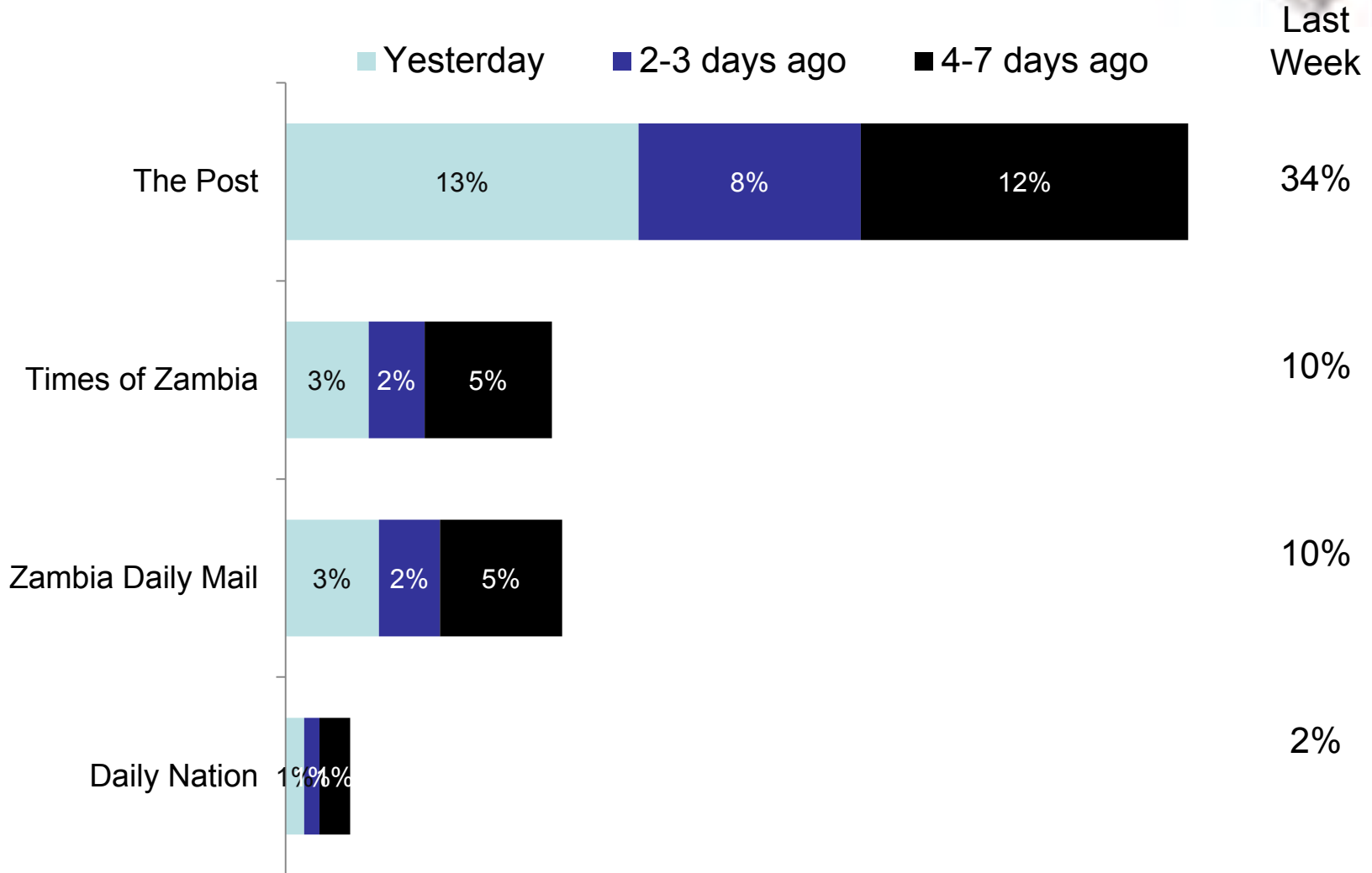




Radio breakdown

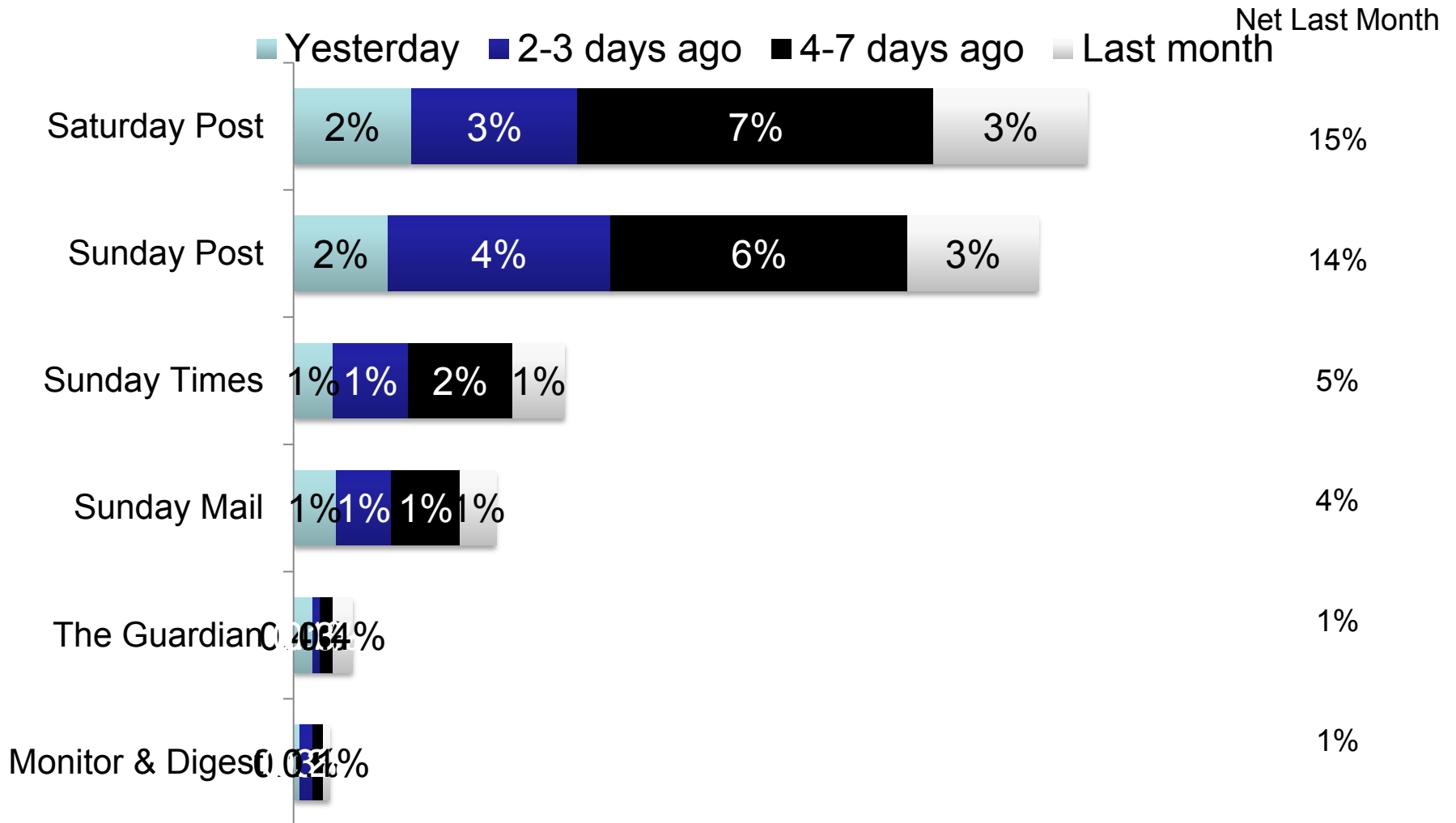


Daily Newspapers

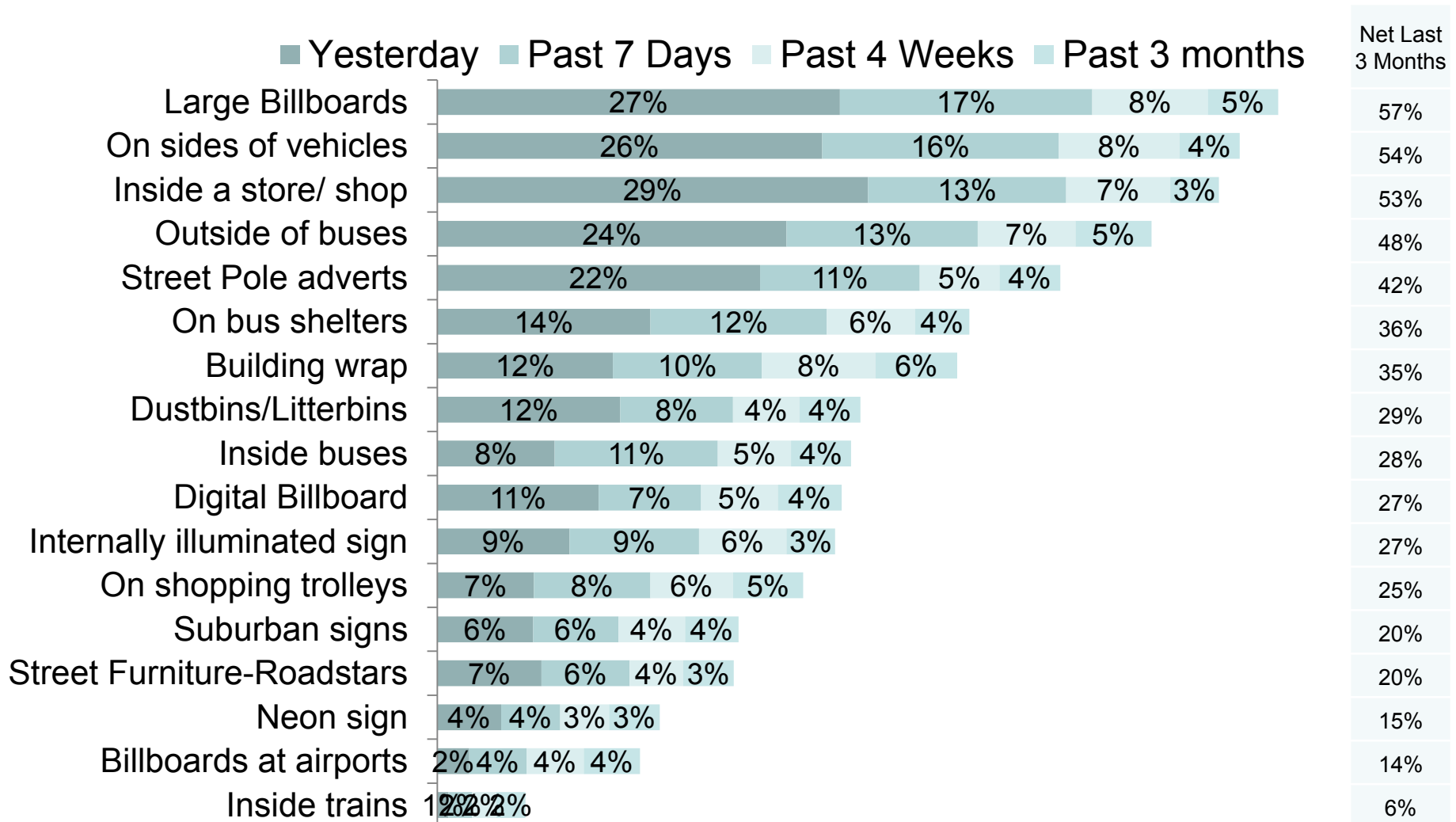
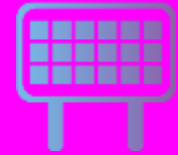




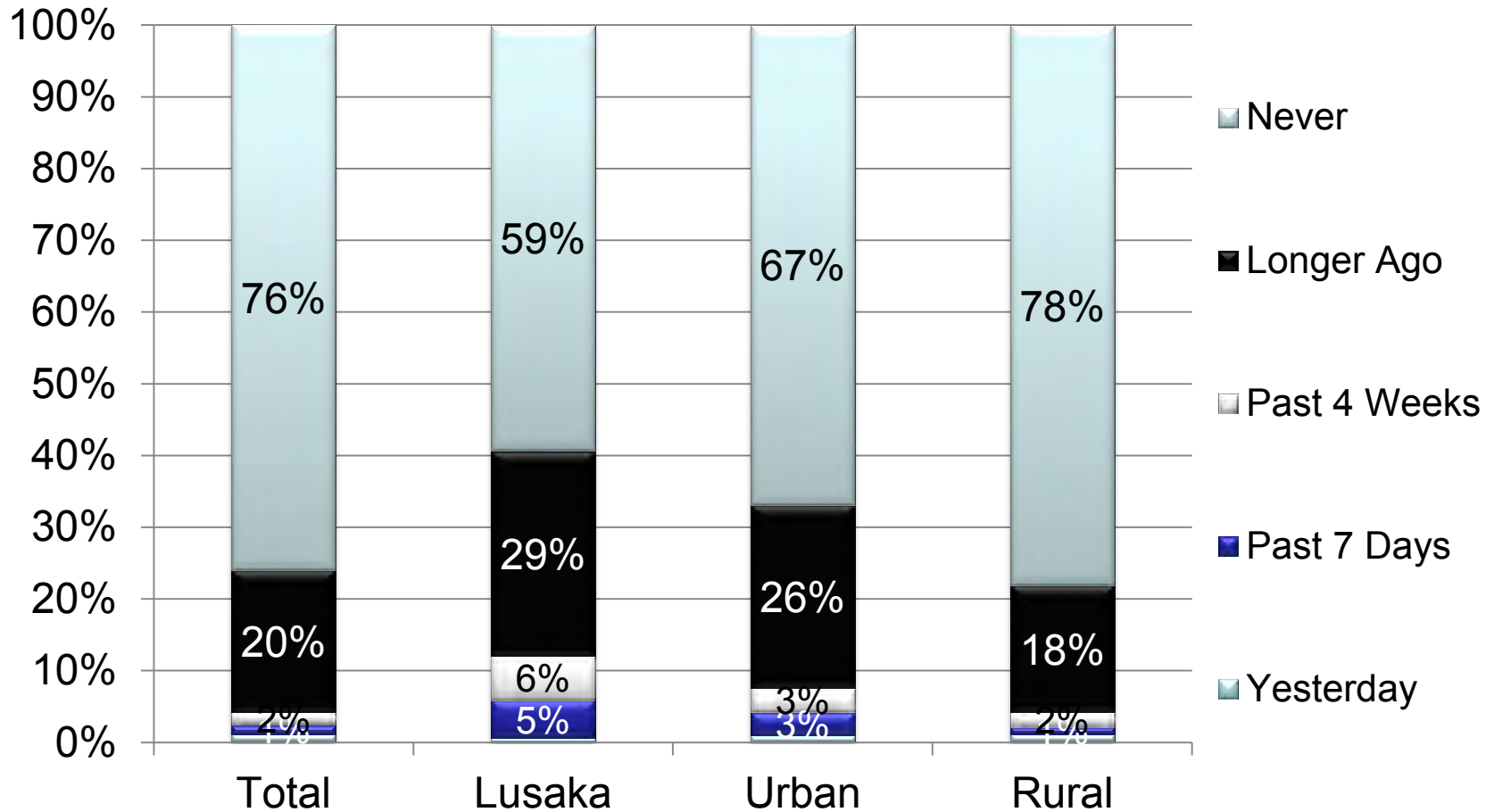
Weekly Newspapers



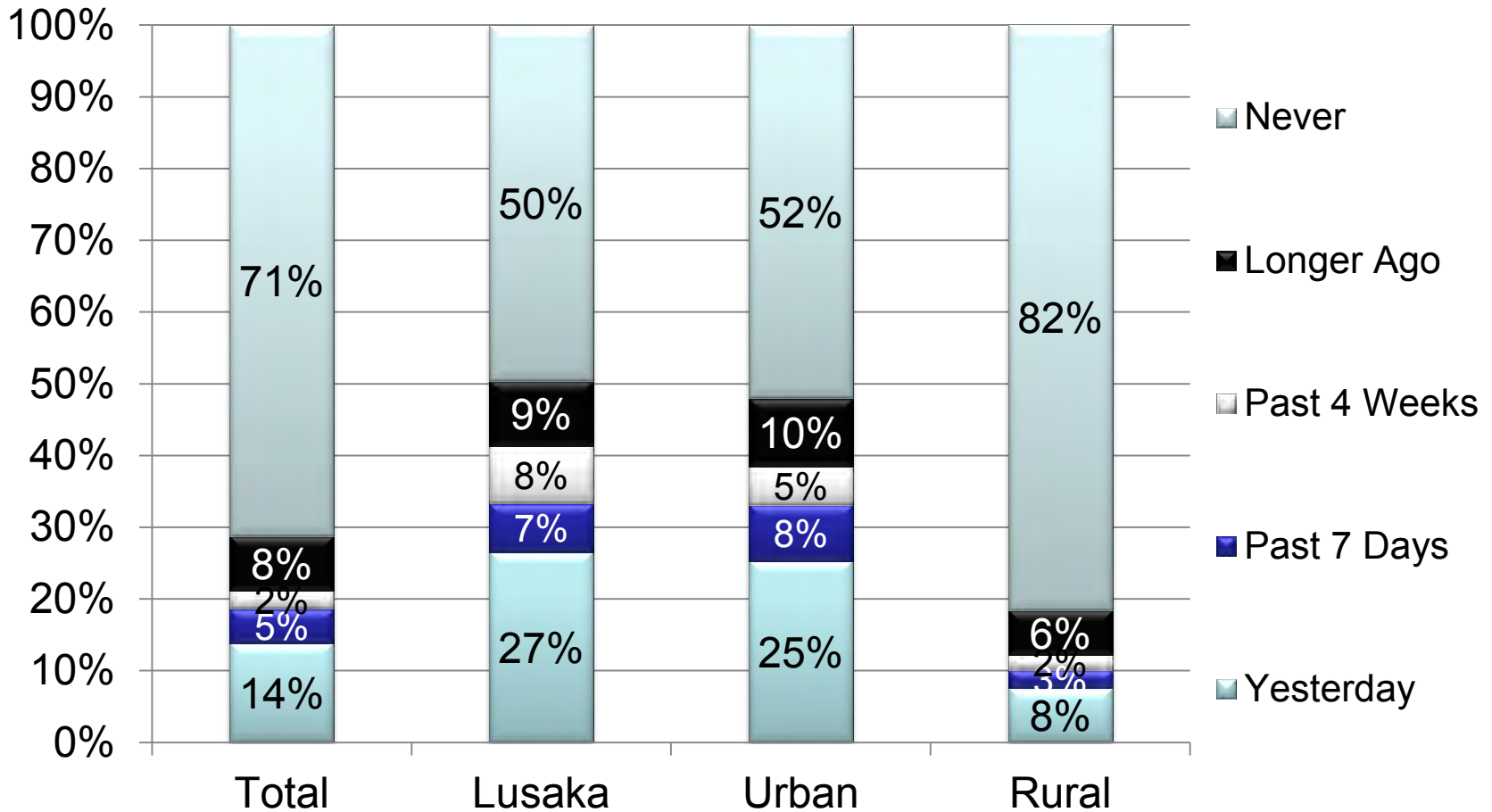
Outdoor breakdown



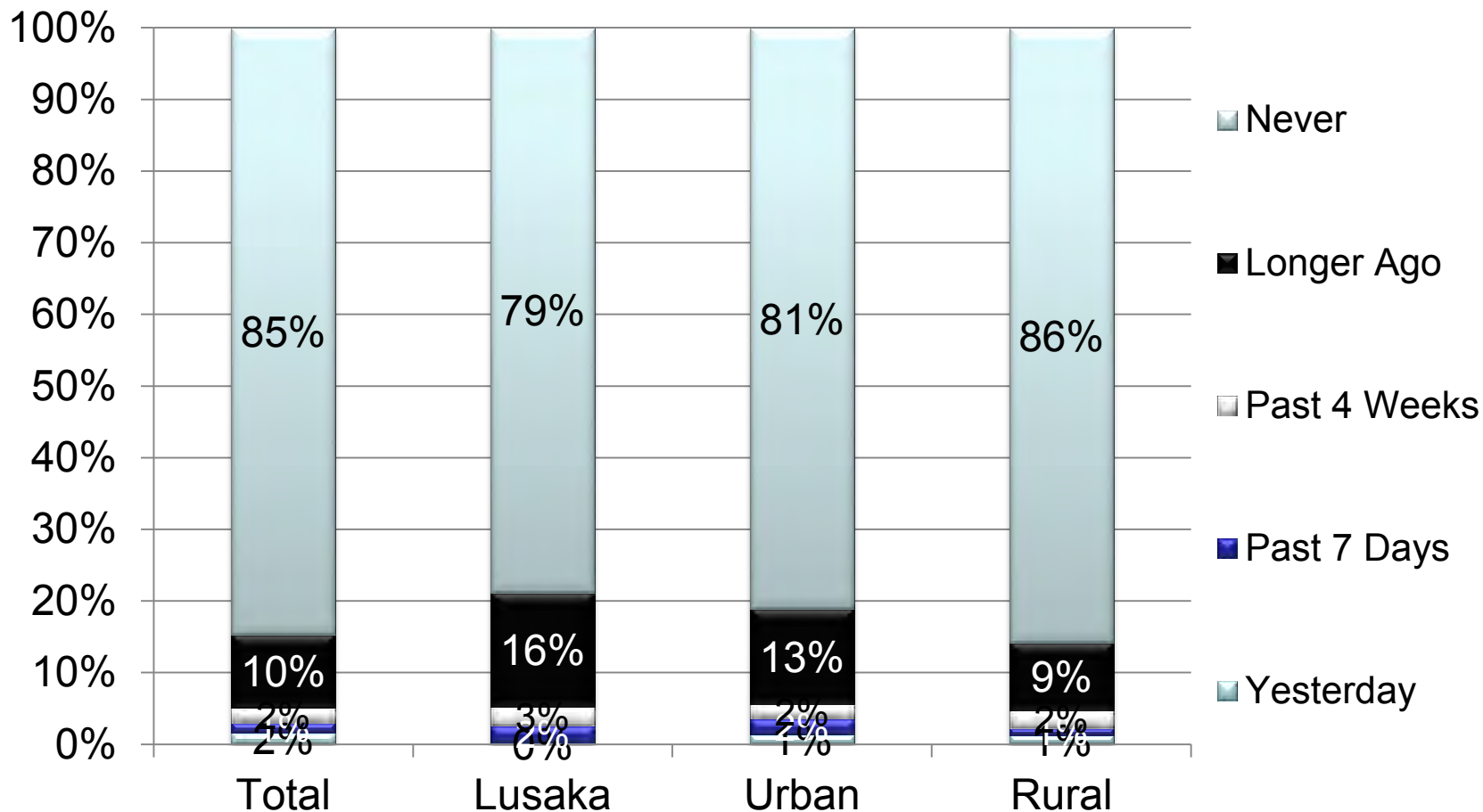
Cinema breakdown



Online breakdown



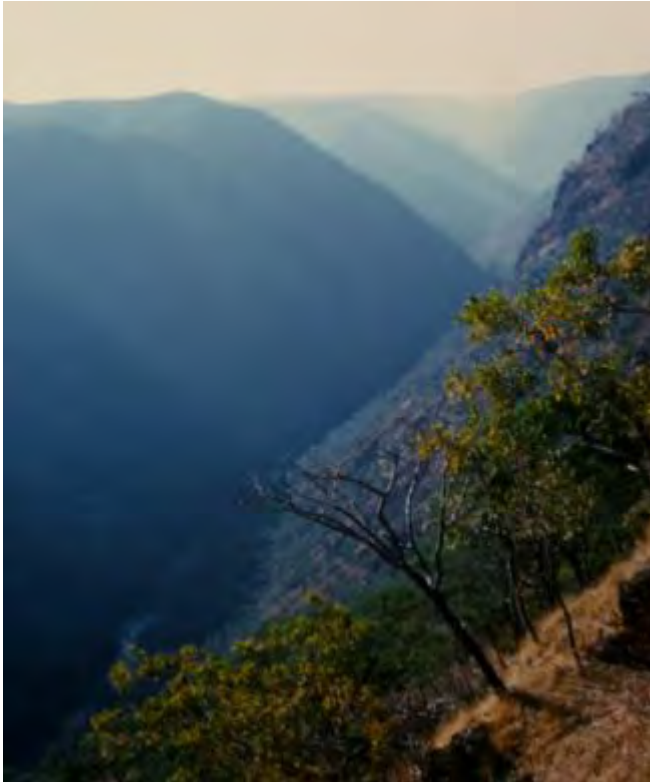
Road show breakdown



ZIMBABWE



Country Overview

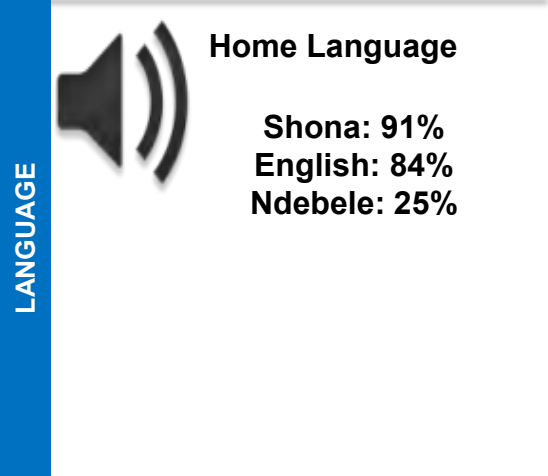
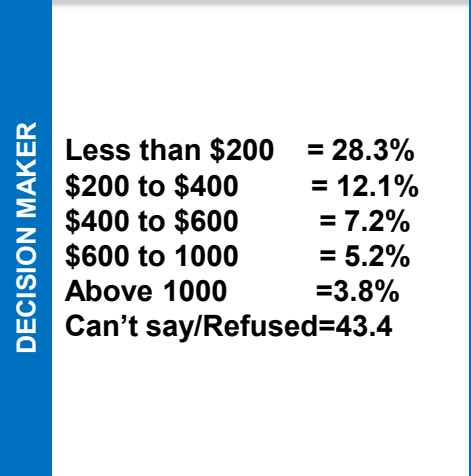
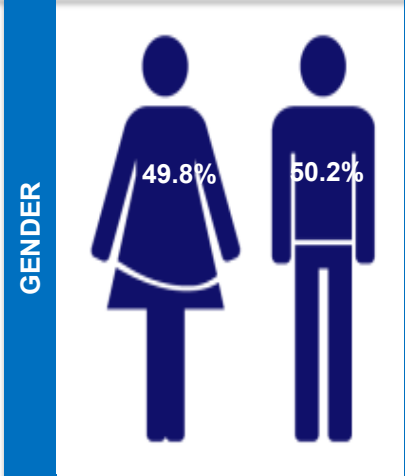
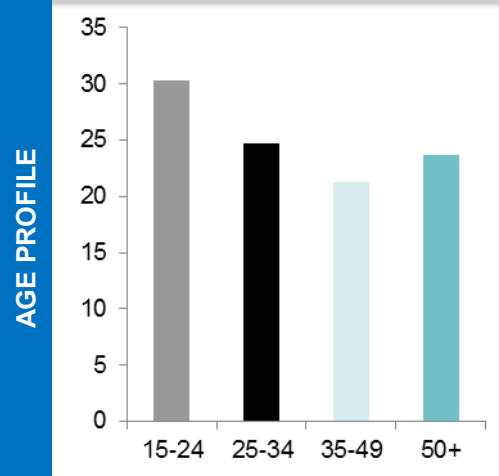


Legislation changes 2014:

Urbanisation vs Rural	Urban-46% Rural-54%
GDP growth rate in 2013	3.20%
% living below poverty line	62.5%
Literacy in Adults over 15yrs	86.0%
% of population below 15yrs	38.0%
Administrative Division	national
No. of Television Sets	61%: urban=89%; rural=35%
No. of Radio Sets	61%: urban 62%; rural=60%
No. of Languages	3 main and 14 smaller
No. of Religions	6
Local Currency	US\$
Exchange Rate (US\$)	US\$ - R12
Latest Census (Year)	2012
Current Political Environment	
Current President	H.E. R.G. Mugabe
Ruling Party	Zanu PF
No. Of Cell Phones	86%
No. Of Landlines	5%
Internet (Service Providers)	25%: urban=42%; rural 9%

COUNTRY STATS

TOTAL UNIVERSE SIZE
13,061,239



BANKING

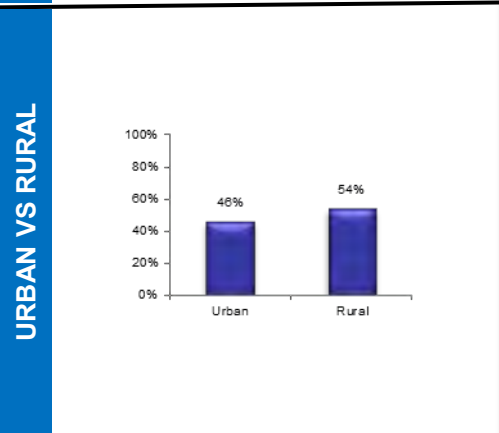
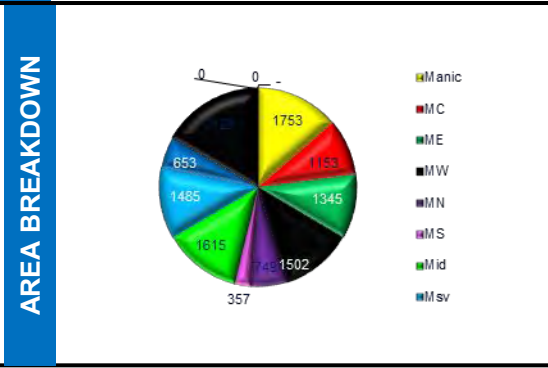
Have an account with a registered bank
19.7% (1 540 405)

GENDER

Protestant 75.9% (includes Apostolic 38%, Pentecostal 21.1%, other 16.8%), Roman Catholic 8.4%, other Christian 8.4%, other 1.2% (includes traditional, Muslim), none 6.1%

LIFESTAGE

Single: 29%
Married: 57%
Widow: 11%
Other: 3%



EDUCATION

Up to Primary: 23.8%
Some Secondary: 48.5%
O/A Level: 11.6%
Diploma & above: 16.1%

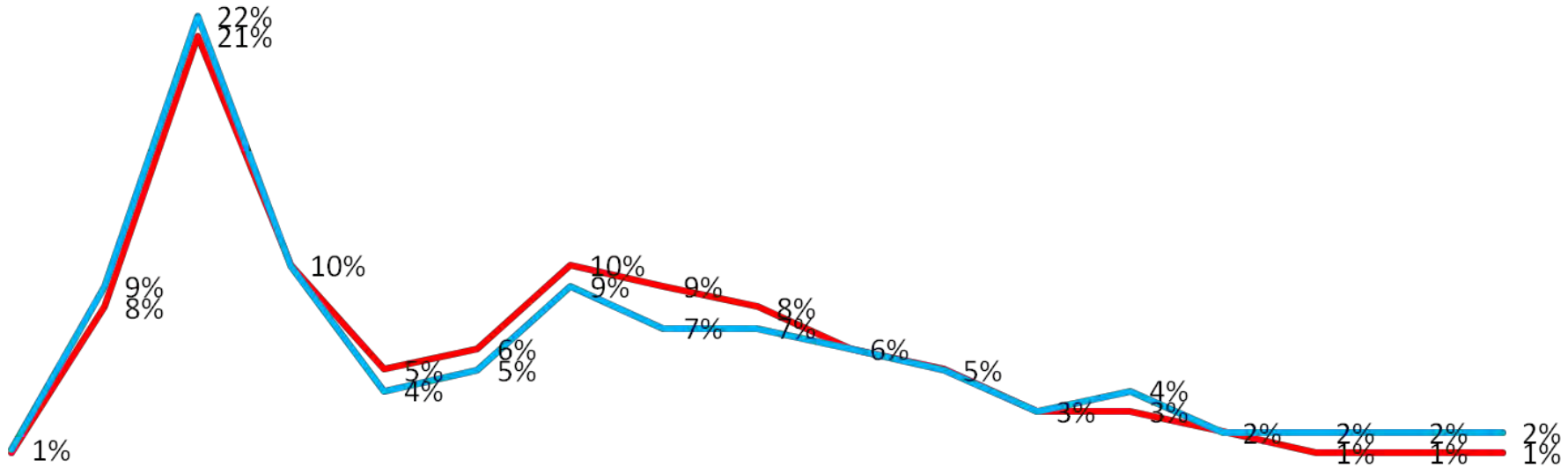
EMPLOYMENT

Work Full Time/Self employed: 29%
Student: 11%
Unemployed/Other: 55%
Retired: 5%

LIVING STANDARD MEASURES (LSMS)

— 2013 — 2014

All Adults



LSM 1 LSM 2 LSM 3 LSM 4 LSM 5 LSM 6 LSM 7 LSM 8 LSM 9 LSM 10 LSM 11 LSM 12 LSM 13 LSM 14 LSM 15 LSM 16 LSM 17



Country Research Company

- ❑ ZAMPS supplier, 2014-2016
- ❑ Topline Research Solutions (TRS)
- ❑ Pan-African market/ing research consultancy.
- ❑ Founded in 2007 inspired by glaring opportunities that Africa exudes.
- ❑ Have full service offices in South Africa and Zimbabwe, key business hubs.
- ❑ conduct research in 13 other African countries through collaborations
- ❑ Corporate member of SAMRA (Southern African Marketing Research Association) and PAMRO (Pan African Media Research Organisation).



Pan African Media
Research Organisation

10th Floor Construction House
110 Leopold Takawira Avenue
Cnr Nelson Mandela
Harare Zimbabwe
Tel: +263 4 764620/1 Website: www.topliners.co.za

TRS
Topline Research Solutions
Your Pan African Research Consultants

www.topliners.co.za

Country Research

ZAMPS

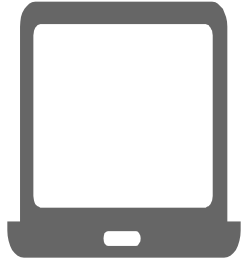
Media Diaries

Last Survey Released	2014	Last Survey Released	
Type of Interview	Adults age 15+	Type of Interview	
Scope of Survey (Universe – Cities)	National: Urban and Rural	Scope of Survey (Universe)	
Media Covered Brands covered	Print / Broadcast / outdoor/ Road show attendance/ Internet Usage/ Cinema Attendance	Media Covered Brands covered	
Survey Funding Cost of Survey	Levies	Survey Funding Cost of Survey	
Next Survey	July 2015	Next Survey	
Sample Size & Methodology	2014: 4000 one wave. PAPI –Pen & Paper 2015: 2000 one wave. CAPI -Computer Aided	Sample Size & Methodology	

Media Overview - Channels & Media Reach

Medium	2011		2012		2013		2014	
	No of Stations	% Reach	No of Stations	% Reach	No of Stations	% Reach	No of Stations	% Reach
TV	7	%	7	%	8	%	3	%
Radio	8	%	8	%	27	%	27	%
Newspapers	8	%	8	%	8	%	9	%
Magazines	8	%	8	%	8	%	8	%
Cinema Screens	8	%	8	%	8	%	8	%
Outdoor Companies	21	%	21	%	21	%	21	%
Online	3	%	3	%	3	%	3	%
Mobile	4	%	4	%	4	%	4	%

Mobile/digital consumption



Internet Access: 25%
Urban: 42%
Rural: 9%

Websites Accessed

- Facebook: 15%
- Google: 15%
- Gmail: 6%
- Yahoo: 3%

INTERNET ASSESS REASON

Communication: 20%
Research: 13%
News: 5%



86% have a cell phone
5% have fixed telephone

Other media

- Outdoor: 63%
- Roadshow: 20%
- Mobile Promotional Unit: 23%

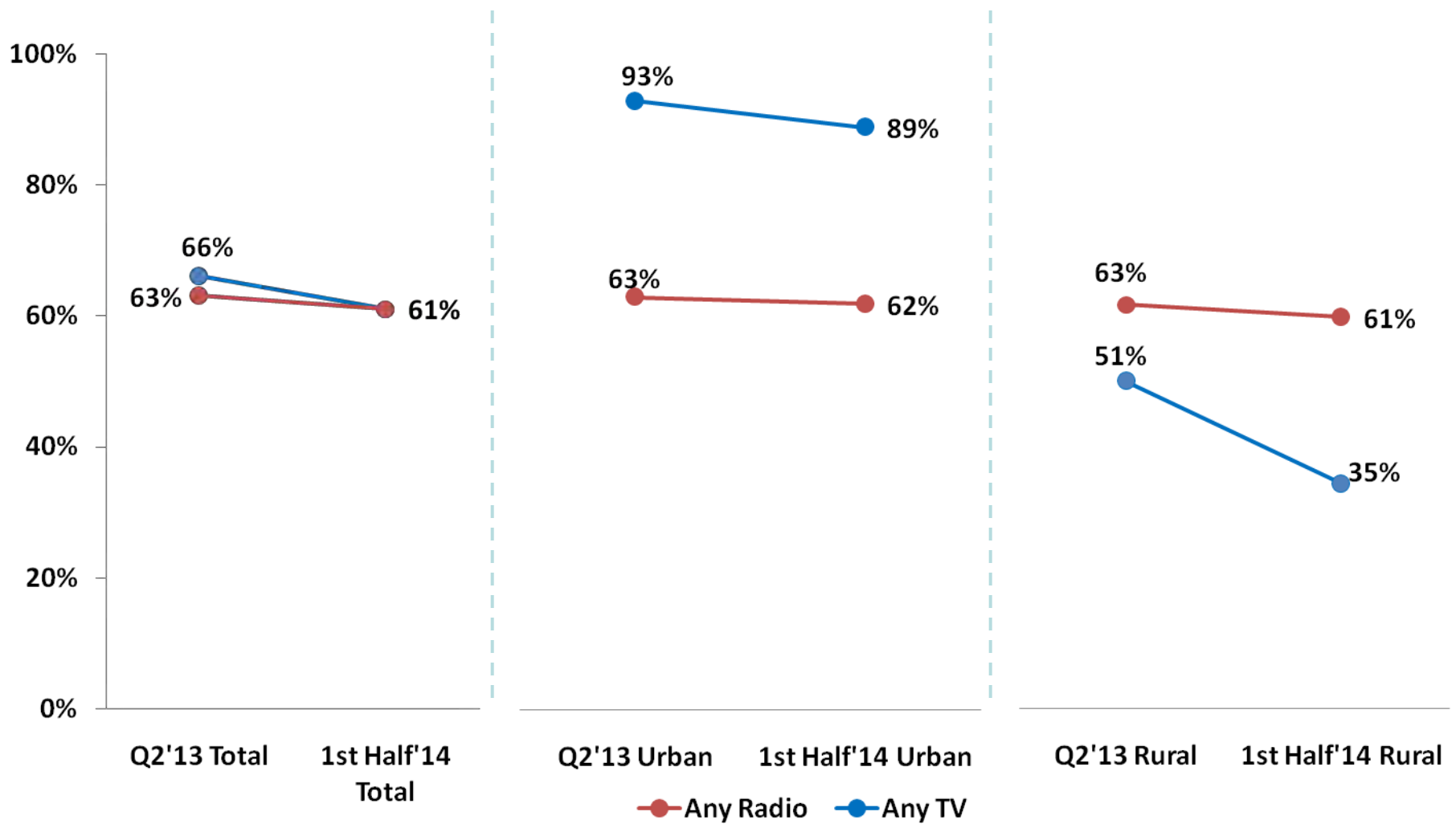




Electronic Media

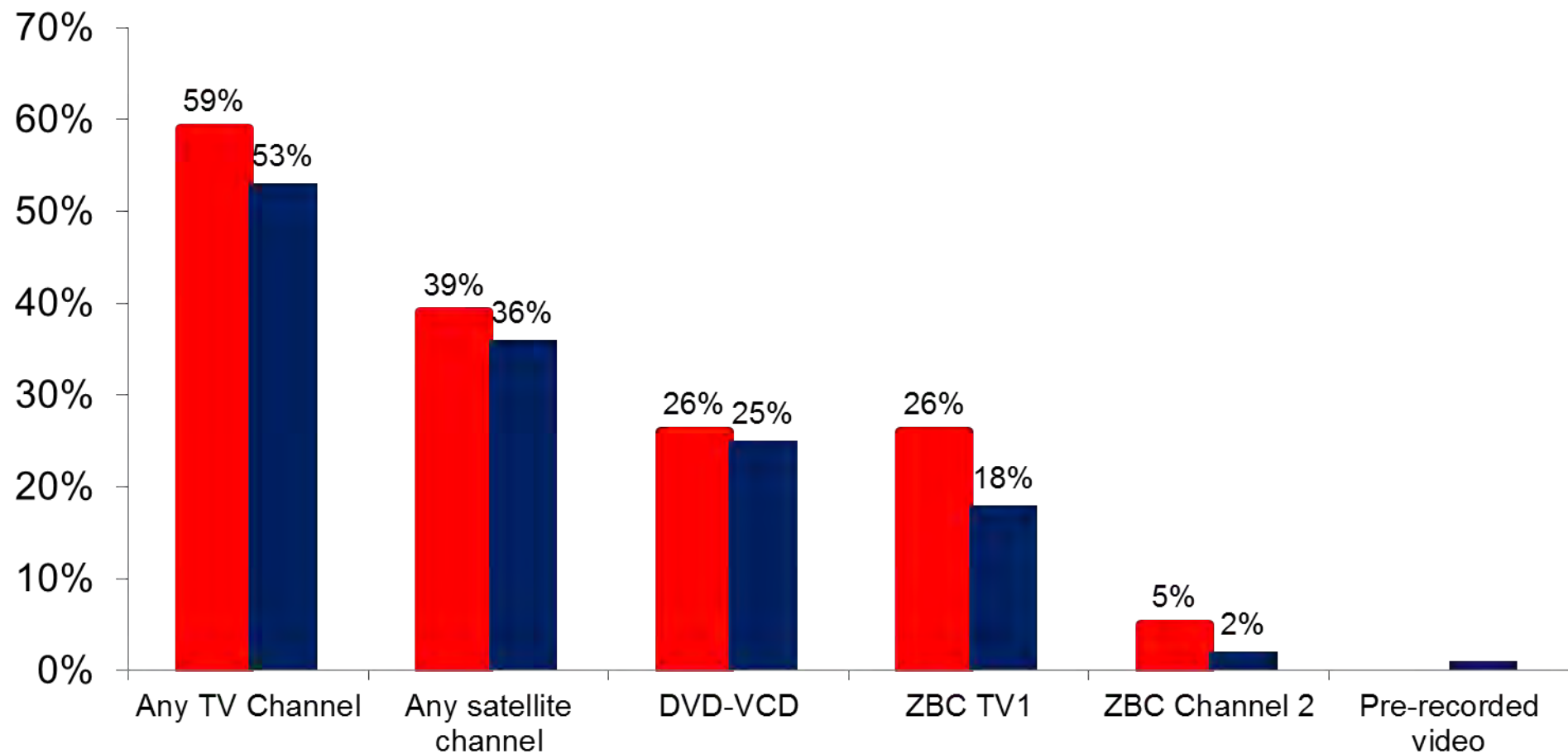


VIEWERSHIP/ LISTENERSHIP OF ELECTRONIC MEDIA



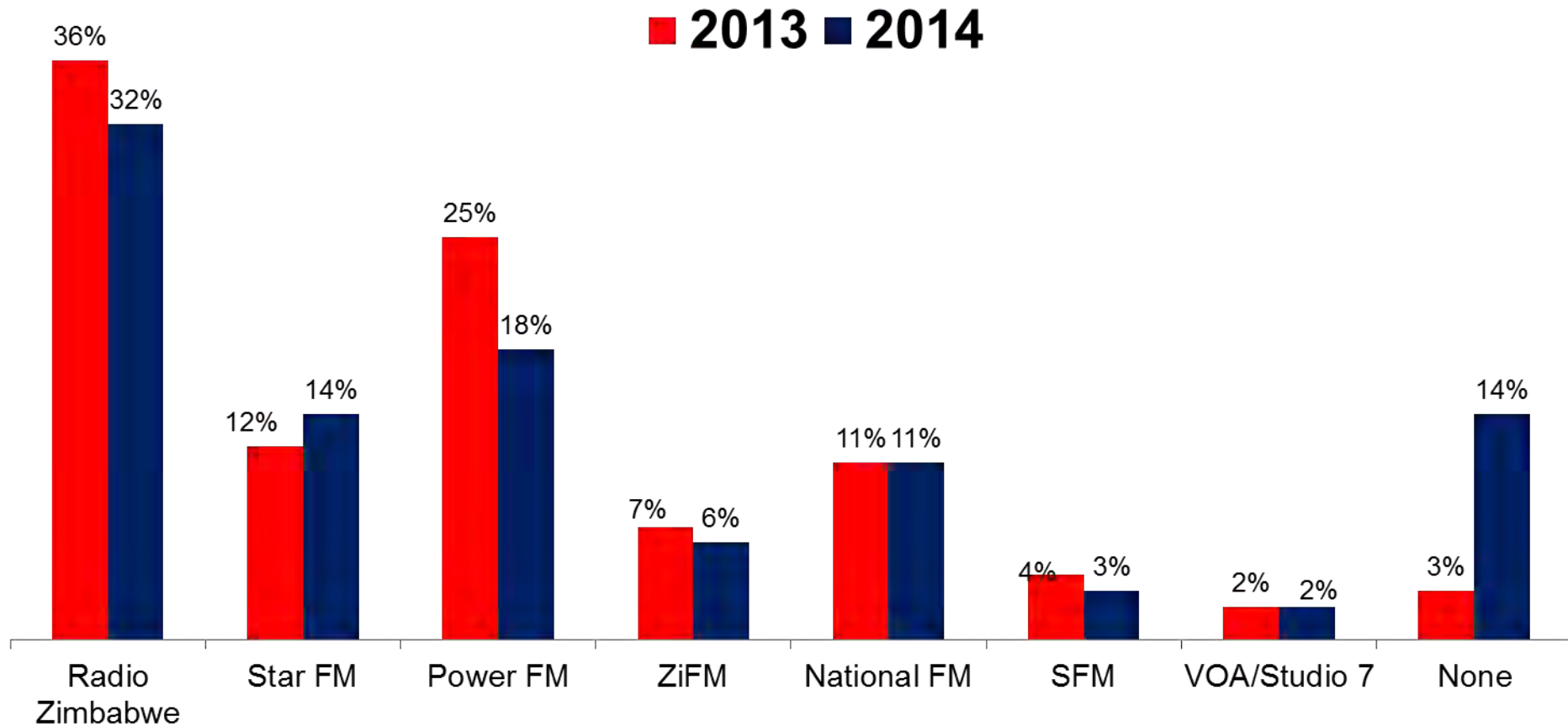
TELEVISION VIEWING

■ 2013 ■ 2014



QH2: Which if any did you watch in the last 7 days?

RADIO STATIONS LISTENED TO



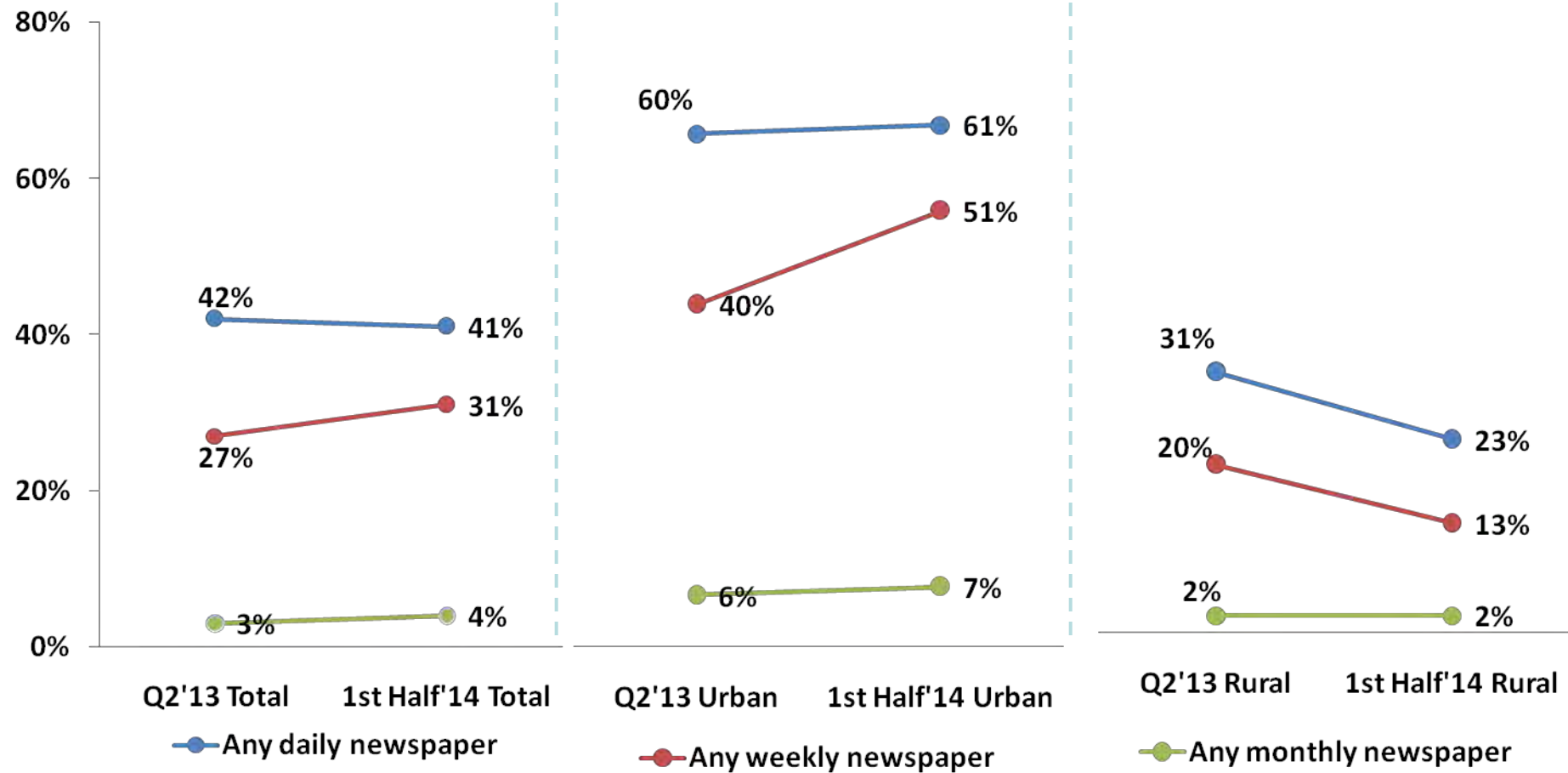
Q12: Which .. radio stations have you listened to during the past 7 days



PRINT MEDIA

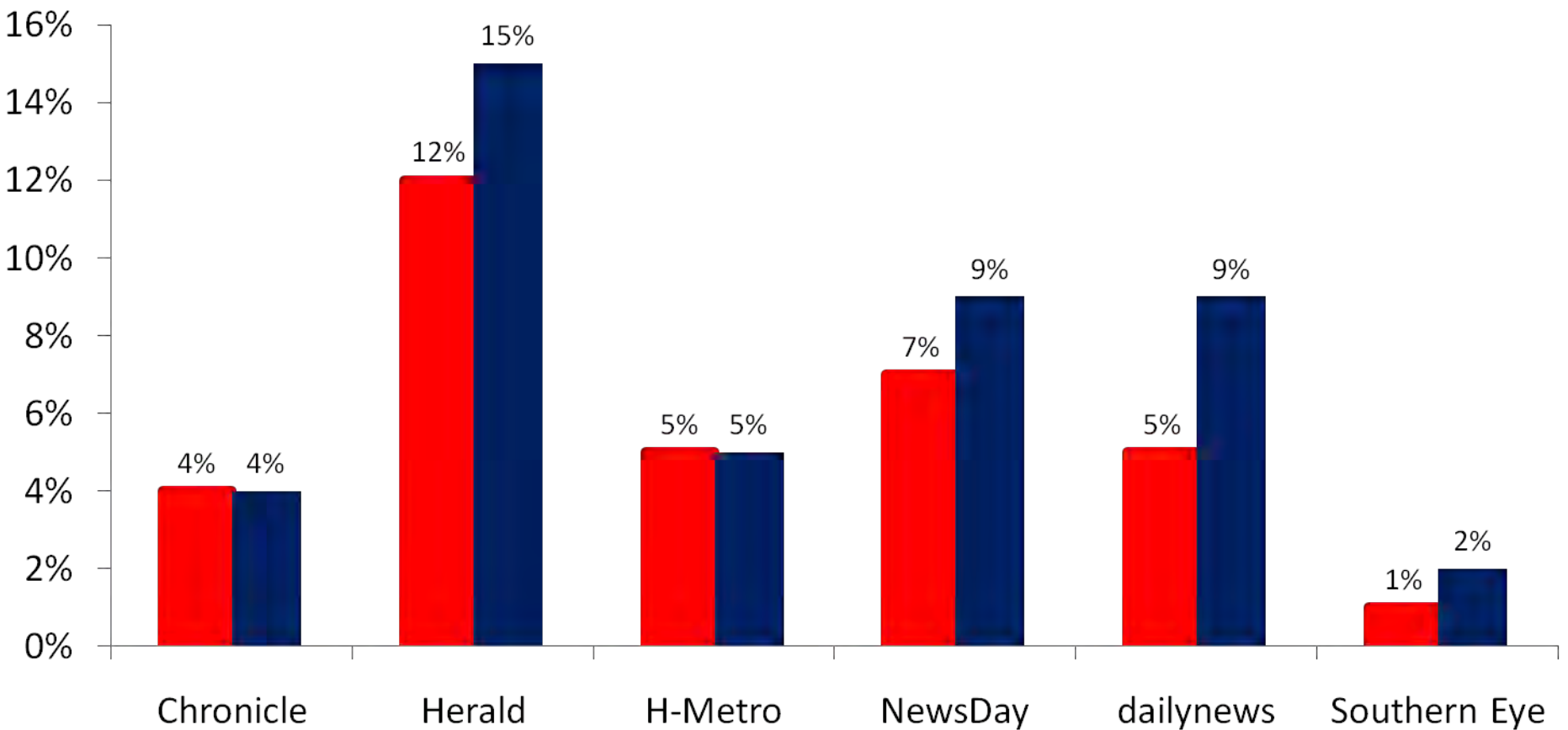


READERSHIP OF PRINT MEDIA



DAILY PRESS- read **yesterday**

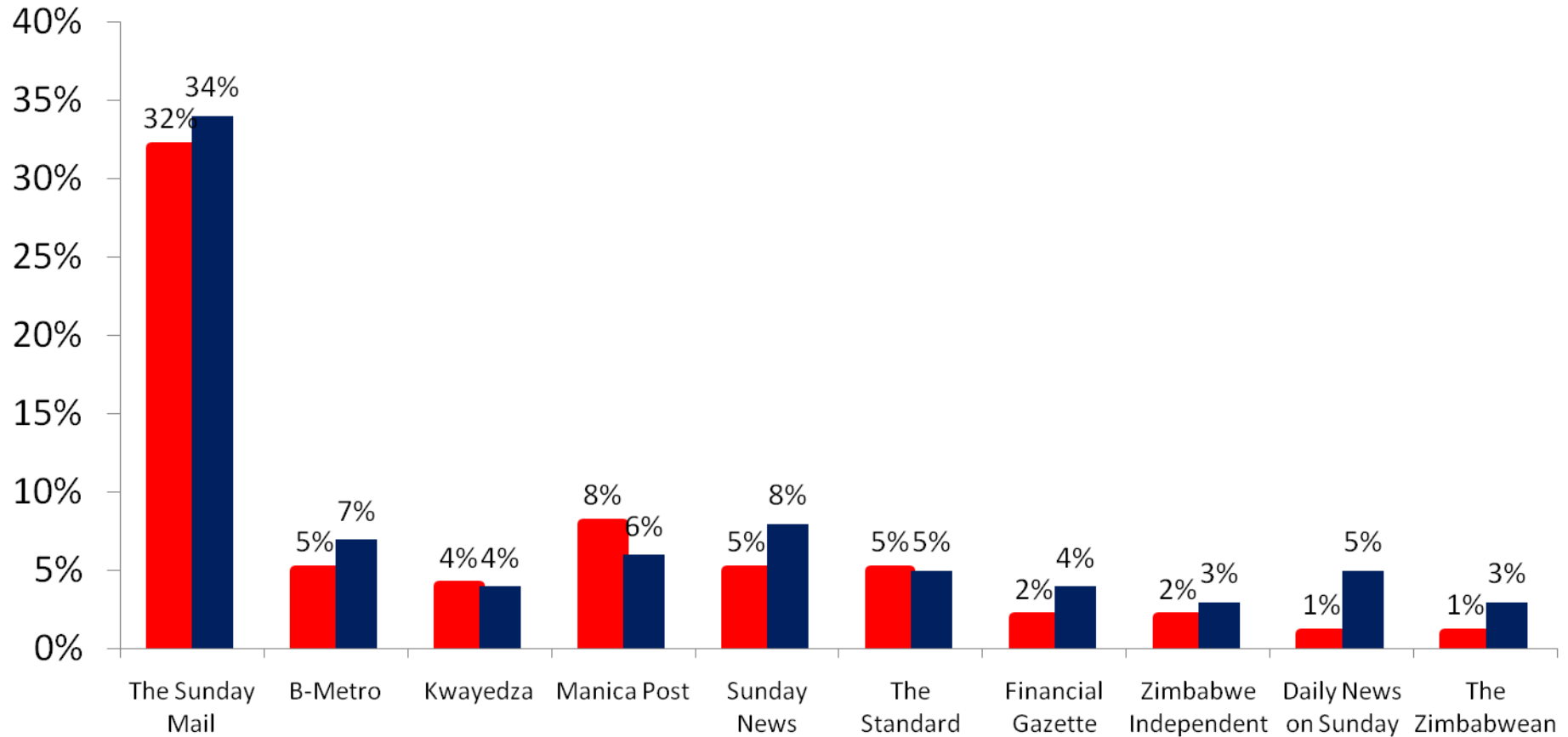
■ 2013 ■ 2014



C3: Excluding today when was the last time you personally read or paged through

WEEKLY PRESS- last 7 days

■ 2013 ■ 2014



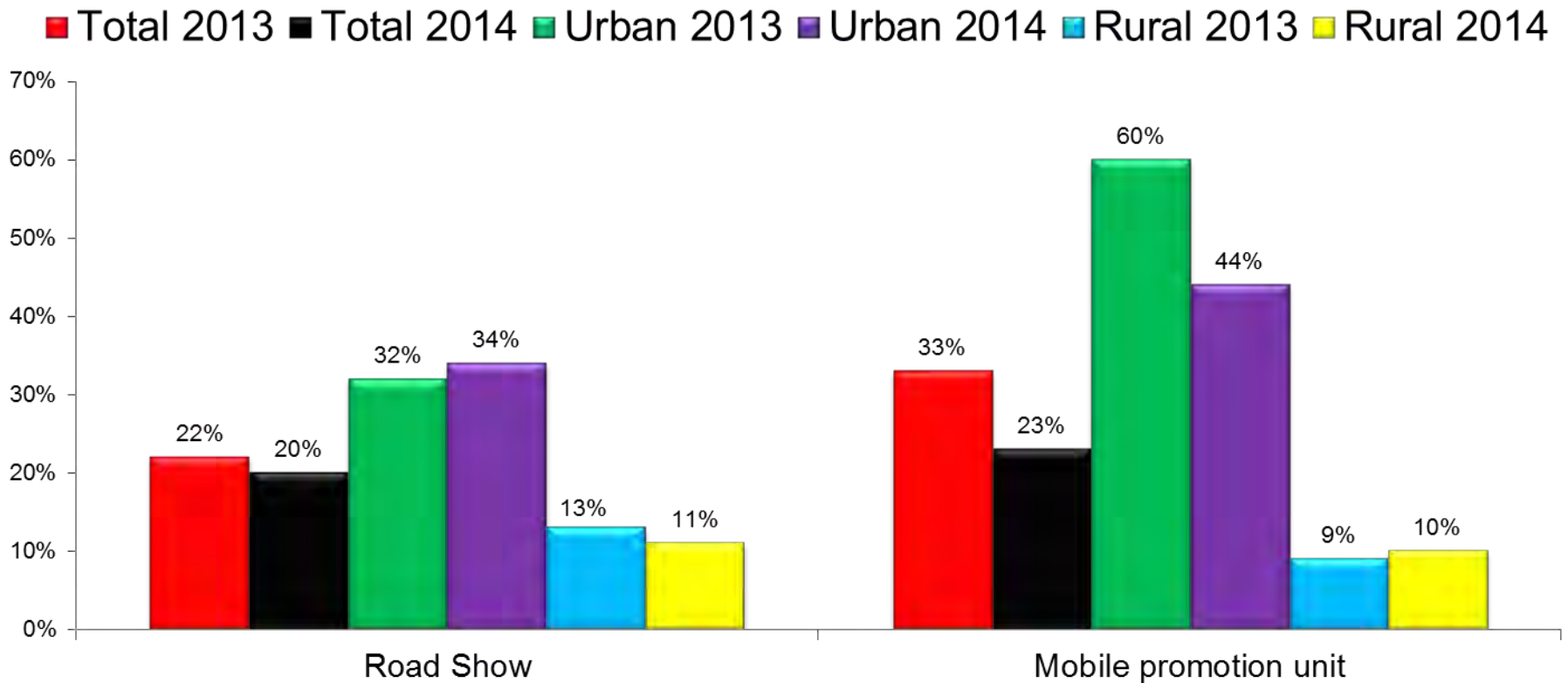
QD3: Excluding today when was the last time you personally read or paged through a copy of?



Other Media



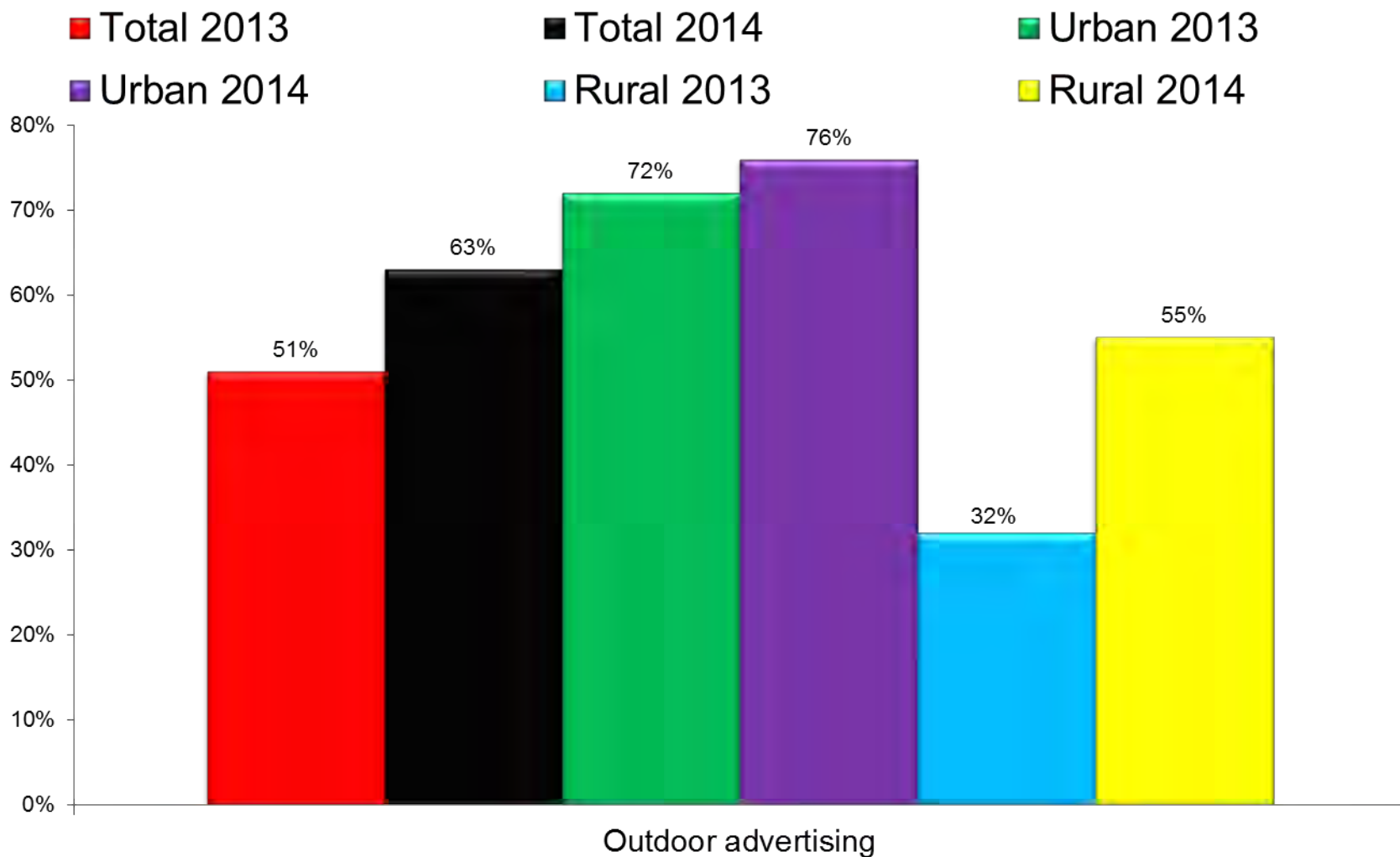
OTHER MEDIA CONSUMPTION



QJ1:Have you personally attended a road show in the past 3 months?

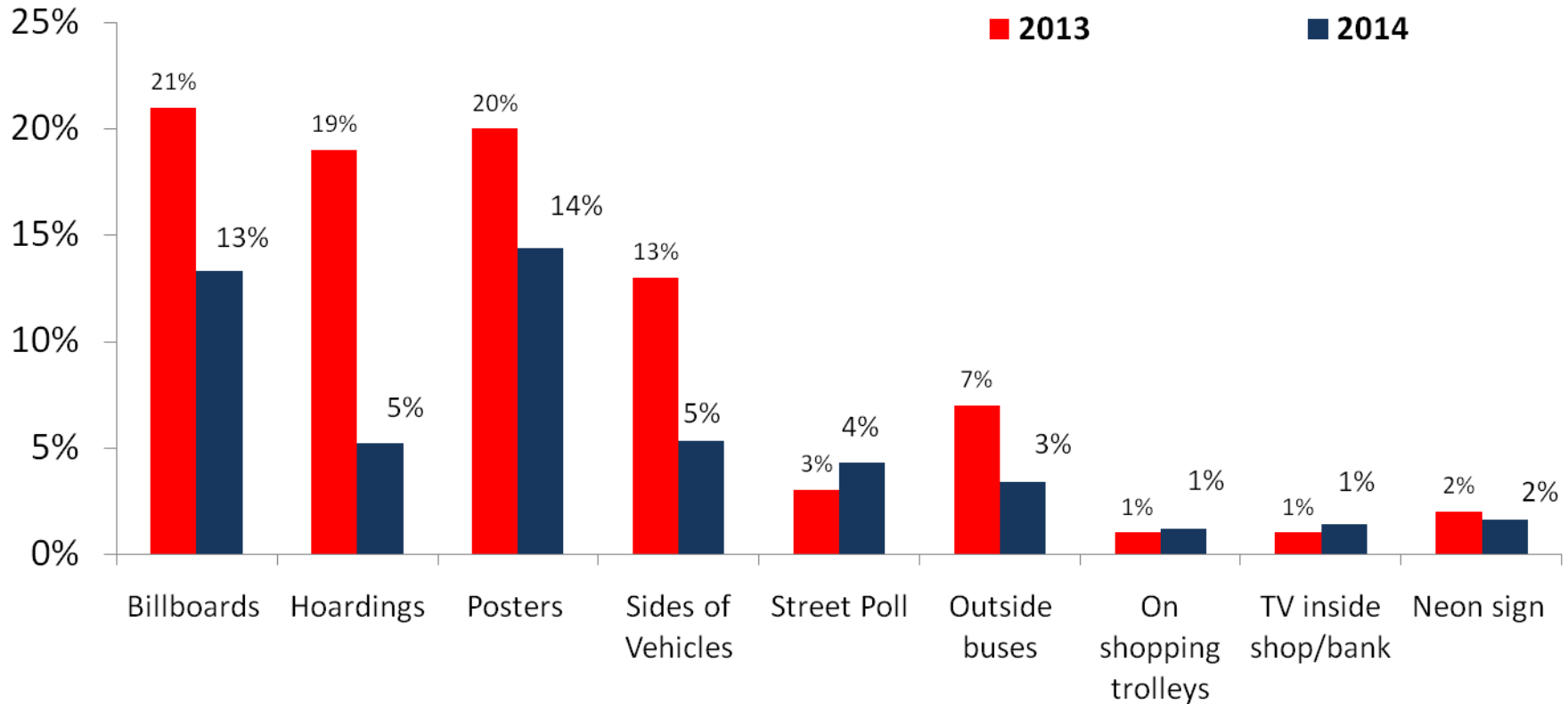
QJ5:Have you personally seen or heard a mobile promotion unit during the past 3 months?

OTHER MEDIA CONSUMPTION



QJ10....Thinking of the past 4 weeks did you see any outdoor advertising

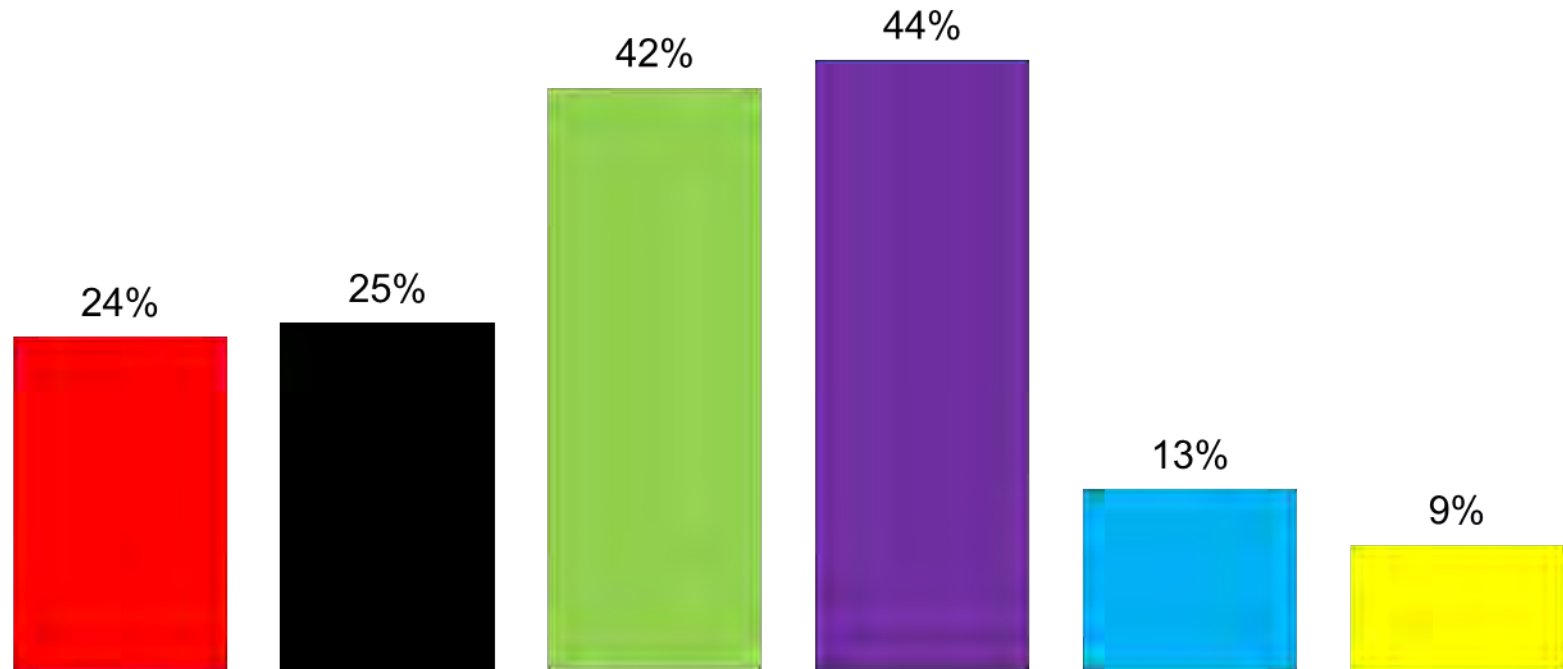
TYPE OF OUTDOOR MEDIA SEEN



Q: What type of outdoor advertising did you see yesterday?

INTERNET ACCESS

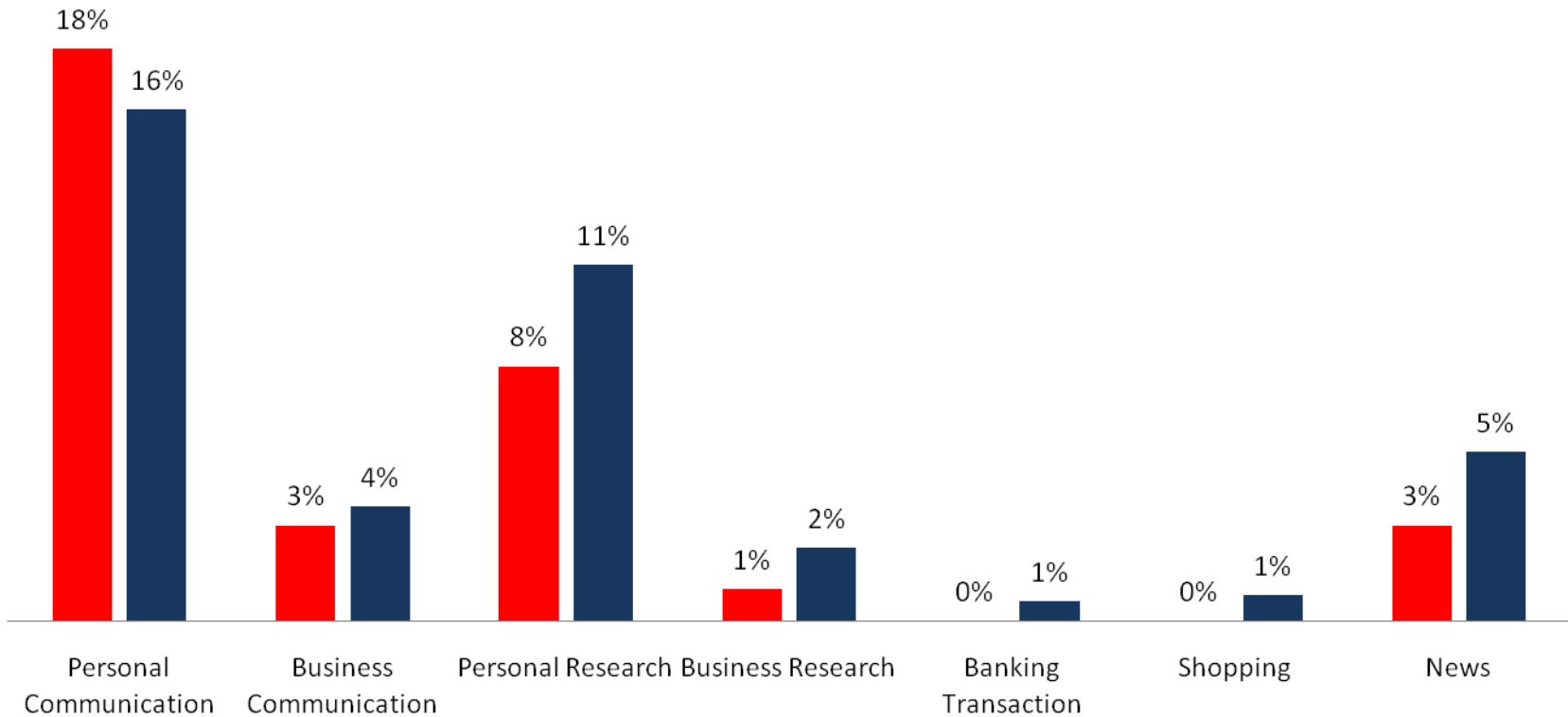
■ Total 2013 ■ Total 2014 ■ Urban 2013 ■ Urban 2014 ■ Rural 2013 ■ Rural 2014



Q: Do you have access to internet?

PURPOSE FOR ACCESSING INTERNET

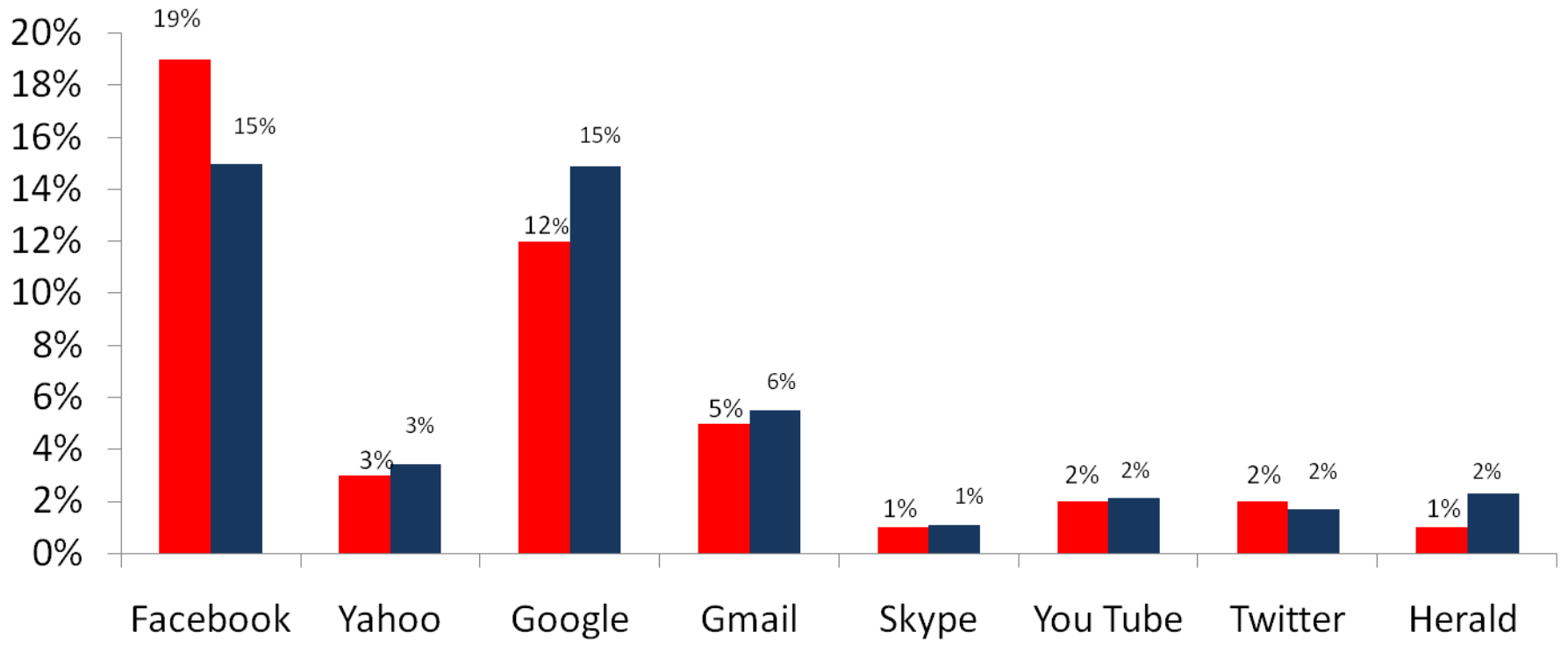
■ 2013 ■ 2014



Q: What do you normally access the internet for?

INTERNET WEBSITES ACCESSED

■ 2013 ■ 2014



Q: Which internet sites/ websites do you regularly browse nowadays?

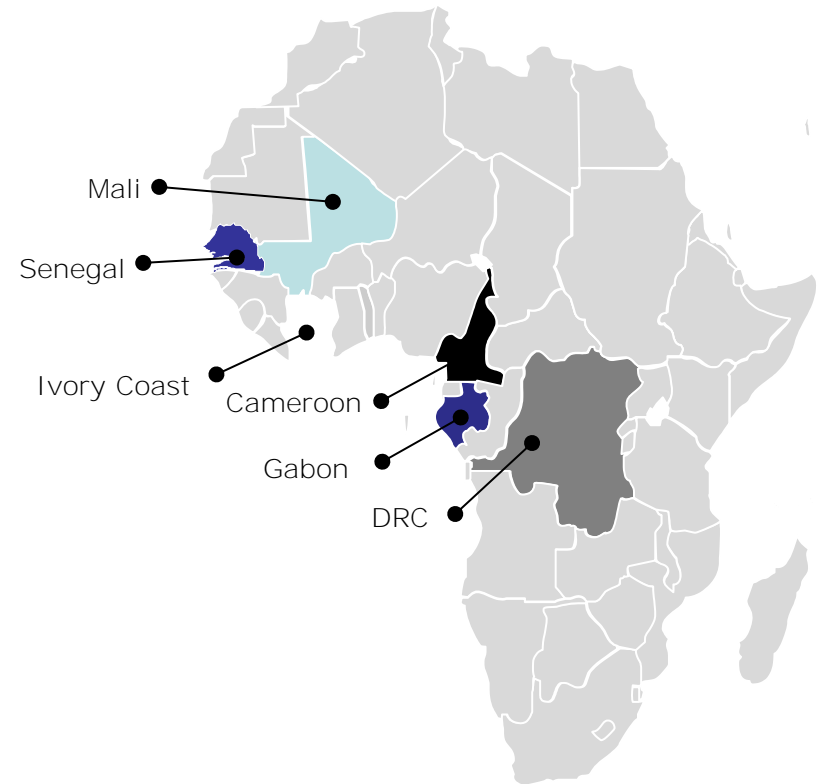
AFRICASCOPE 2013



Global scope of the study : 6 main countries

Population of 15 y.o or more
living in this area in 2013

	Ivory Coast (Abidjan)	2,651,000
	Senegal (Dakar/Pikine)	1,778,000
	DRC (Kinshasa)	5,863,000
	Gabon (Libreville)	396,000
	Mali (Bamako)	1,094,000
	Cameroon (Douala/Yaoundé)	2,611,000



- 1 Ivory Coast
Abidjan



Methodology



Survey universe: Individuals of 15 years old + living in Ivory Coast (Abidjan)

Interrogation face to face at the interviewees' household

Method of quotas

- Gender
- Age (6 classes)
- Level of instruction (4 classes)
- Occupation of the interviewee

1 person eligible per household

Referring period: Monday – Sunday

Field period: 23rd of May to the 5th of June 2013

	Sample	Population (K)
Individuals of 15 years old and +	1164	2651
Including managers and executives	122	87

1% of average daily audience represents 26,510 people aged 15 and older.

Ivory Coast overview

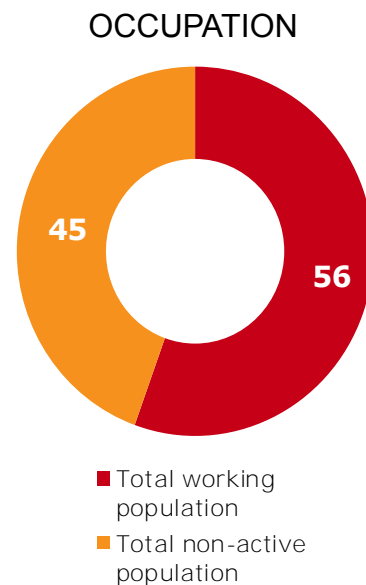
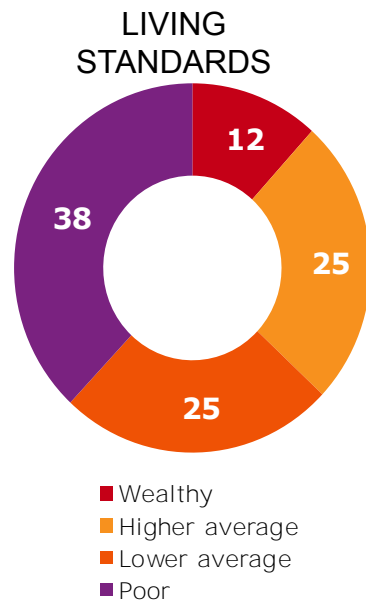
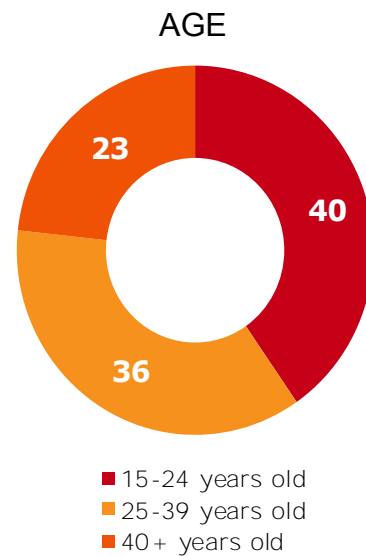
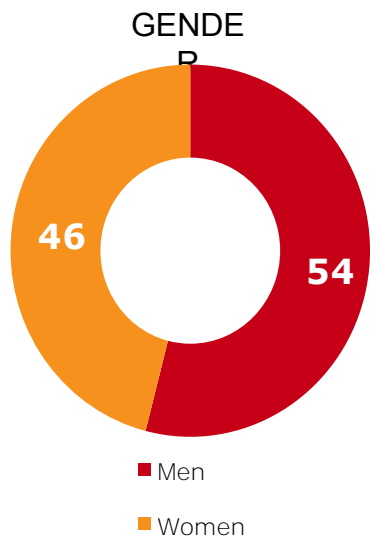
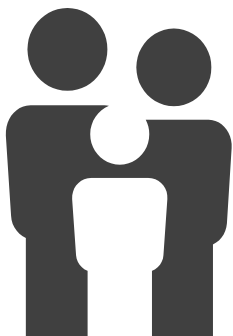
Surface	<i>322,460 km²</i>
Population	<i>19,737,800</i>
Projection 2050	<i>27,572,00</i>
Demographic growth	<i>2%</i>
GDP growth rate	<i>8.7% (2013 est.)</i>
Population under 15 y.o	<i>41%</i>
Median Age	<i>20.3</i>
Density of population	<i>67hab/km²</i>
Urban population	<i>53.5%</i>
Life expectancy	<i>55.4 years</i>
Infant mortality	<i>86%</i>
% Living below the poverty line	<i>42% (2000 est.)</i>
Literacy	<i>55.3%</i>
Human Development Index (HDI)	<i>Indicator : 0.4</i> <i>Rank : 170 (over 187 countries)</i>
Languages used	<i>French (official language)</i> <i>Sénoufos, in Agris, Bete, Baoule, Dioula, Malinke, ...</i>
Religions	<i>Christians, Muslims</i>
Currency	<i>West African CFA franc (XOF)</i>
Exchange rate	<i>1 USD = 589 XOF</i>



• Sources : UN data / CIA – The World Factbook / Jeuneafrique.com

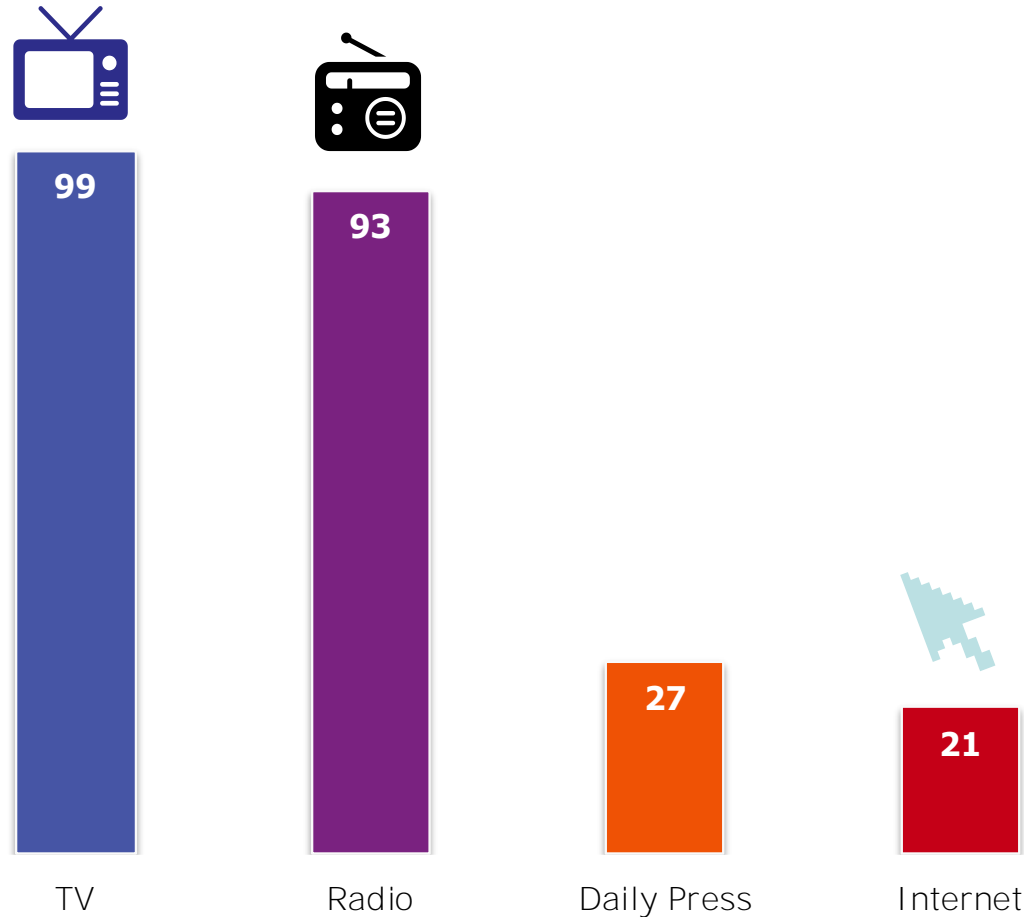
Country Statistics

In 2013, the population of 15 years old and more in Abidjan is estimated to **15.5 million** individuals.



Focus on Media Consumption

The television is the first media in Ivory Coast, closely followed by the radio



Media habits – At least once a week (%)

Base : Total population

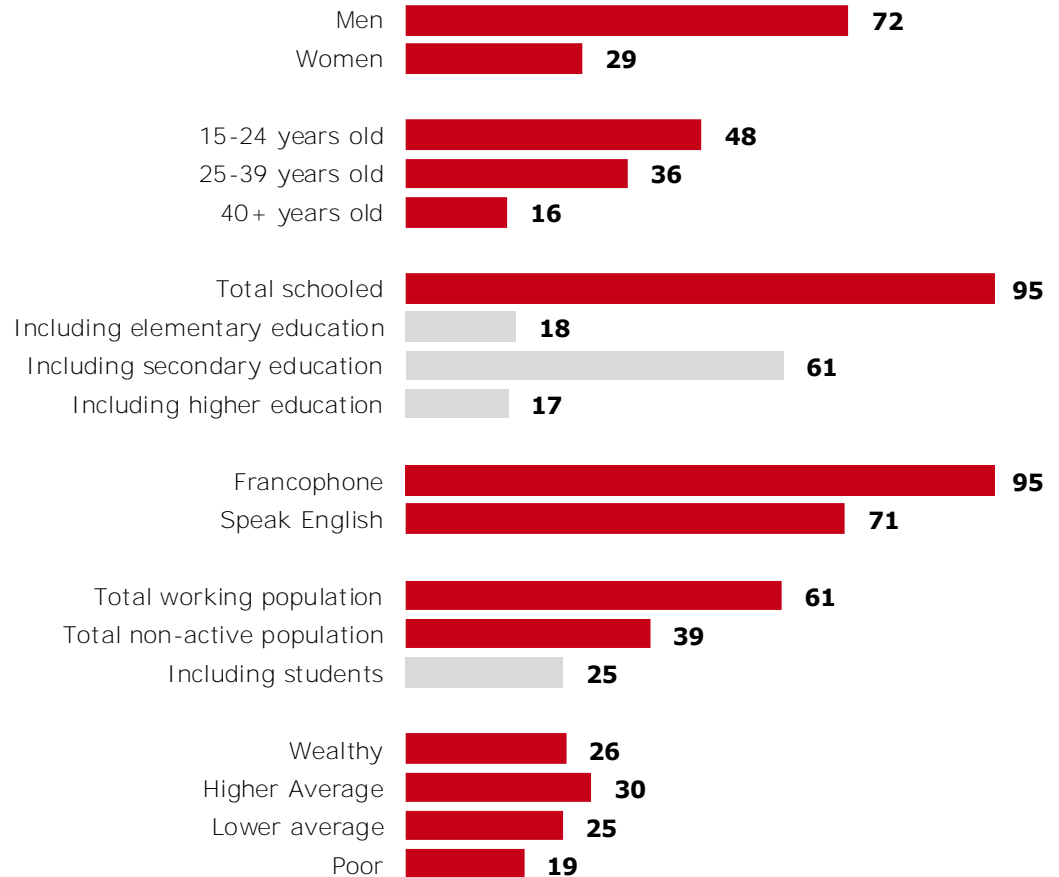
Focus on Internet consumption

Internet users profile



34%

of the Ivoirian population use the
Internet



• 2

Senegal

Dakar/Pikine



Methodology



Survey universe: Individuals of 15 years old + living in Senegal (Dakar / Pikine)

Interrogation face to face at the interviewees' household

Method of quotas

- Gender
- Age (6 classes)
- Level of instruction (4 classes)
- Occupation of the interviewee

1 person eligible per household

Referring period: Monday – Sunday

Field period: 15th to 28th, April 2013

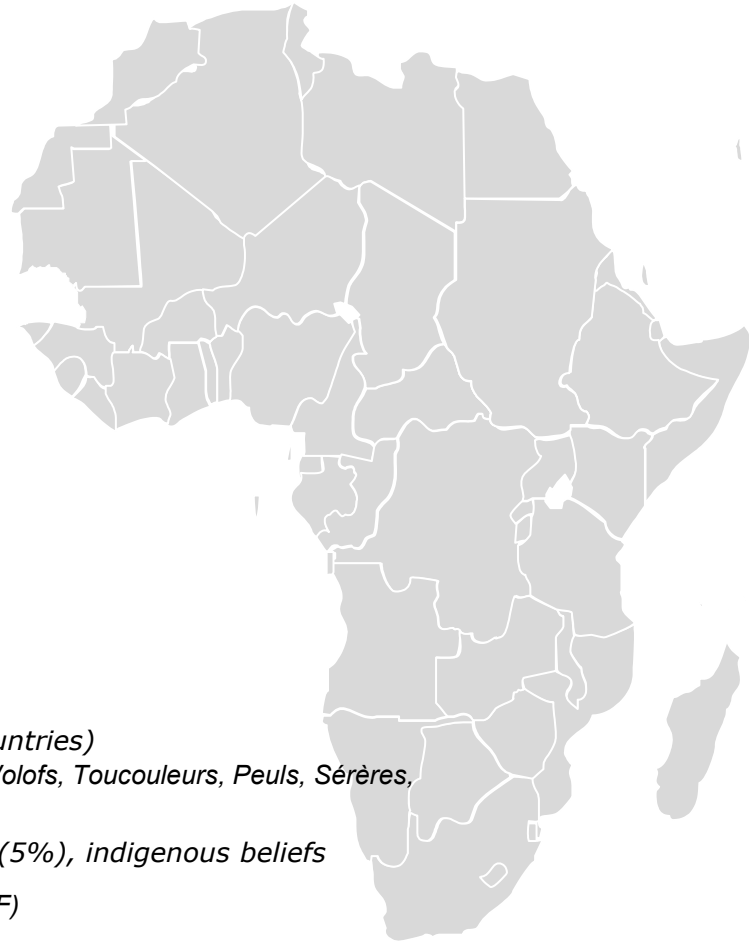


	Sample	Population (K)
Individuals of 15 years old and +	1157	1778
Including managers and executives	109	35

1% of average daily audience represents 17,780 people aged 15 and older.

Senegal overview

Surface	<i>196,720 km²</i>
Population	<i>12,433,728 hab.</i>
Projection 2050	<i>21,589,000 hab.</i>
Demographic growth	<i>2.7 %</i>
GDP growth rate	<i>3.5% (2013 est.)</i>
Population under 15 y.o	<i>44 %</i>
Median Age	<i>18.4 years</i>
Density of population	<i>65 hab./km²</i>
Urban population	<i>42.7 %</i>
Life expectancy	<i>59,3 ans</i>
Infant mortality	<i>50%</i>
% Living below the poverty line	<i>46.7%</i>
Literacy	<i>49.7%</i>
Human Development Index (HDI)	<i>Indicator : 0.459</i> <i>Rank : 155 (over 187 countries)</i>
Languages used	<i>French (official language), Wolofs, Toucouleurs, Peuls, Sérères, Diolas, Mandingues...</i>
Religions	<i>Muslim (94%), catholics (5%), indigenous beliefs</i>
Currency	<i>West African CFA franc (XOF)</i>
Exchange rate	<i>1 USD = 654.84 XOF</i>

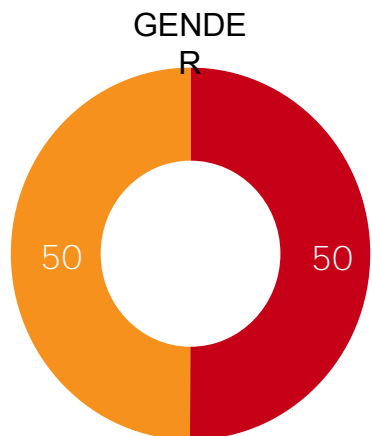


• Sources : UN data / CIA – The World Factbook / Jeuneafrique.com

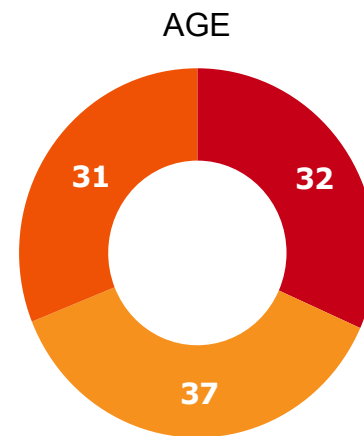
Country Statistics

In 2013, the population of 15 years old and more in Dakar and Pikine is estimated to

1,778,000 individuals.

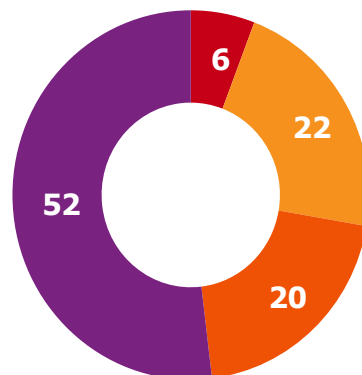


- Men
- Women



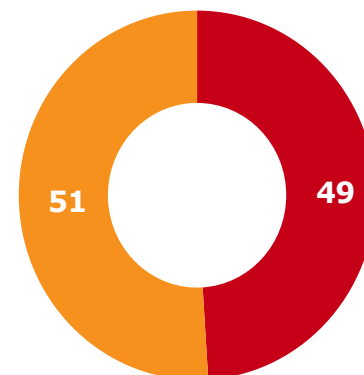
- 15-24 years old
- 25-39 years old
- 40+ years old

LIVING STANDARDS



- Wealthy
- Higher average
- Lower average
- Poor

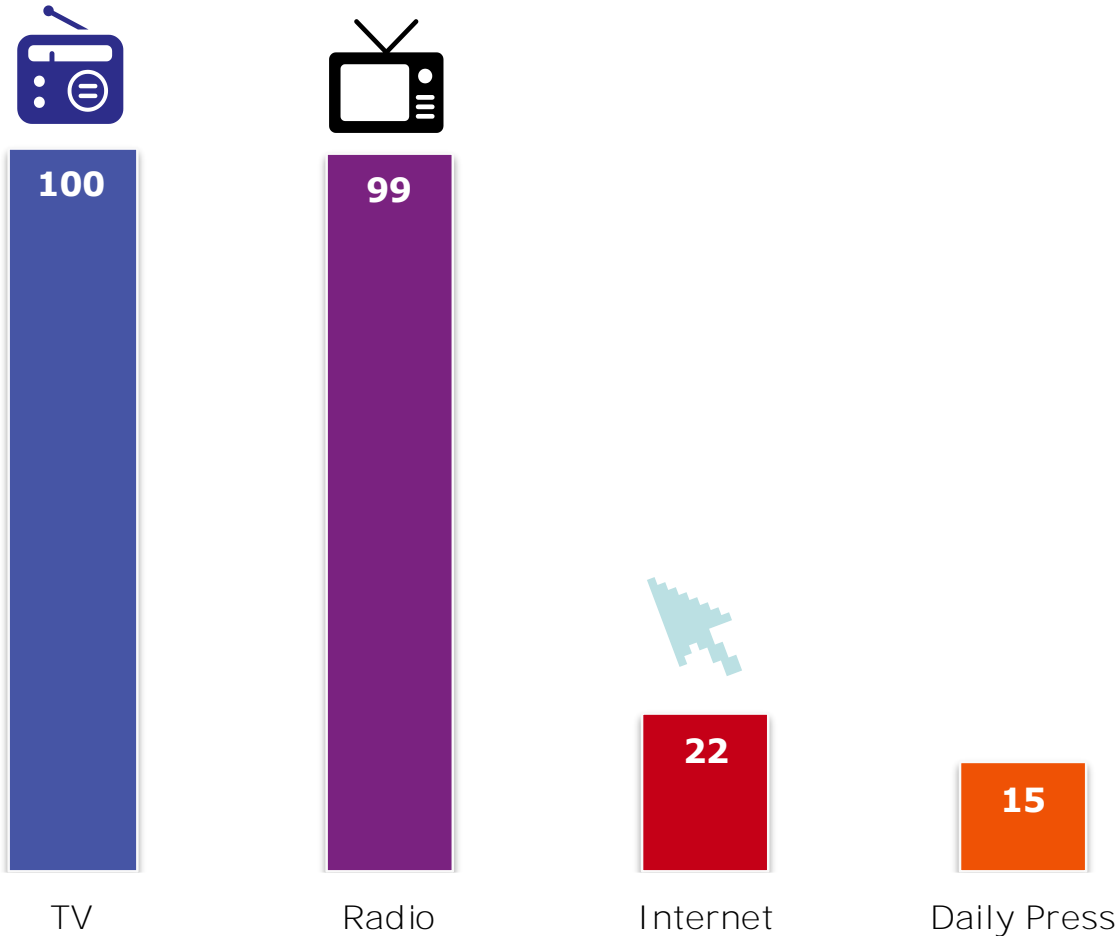
OCCUPATION



- Total working population
- Total non-active population

Focus on Media Consumption

The television is the first media in Senegal, closely followed by the radio



Media habits – At least once a week (%)

Base : Total population

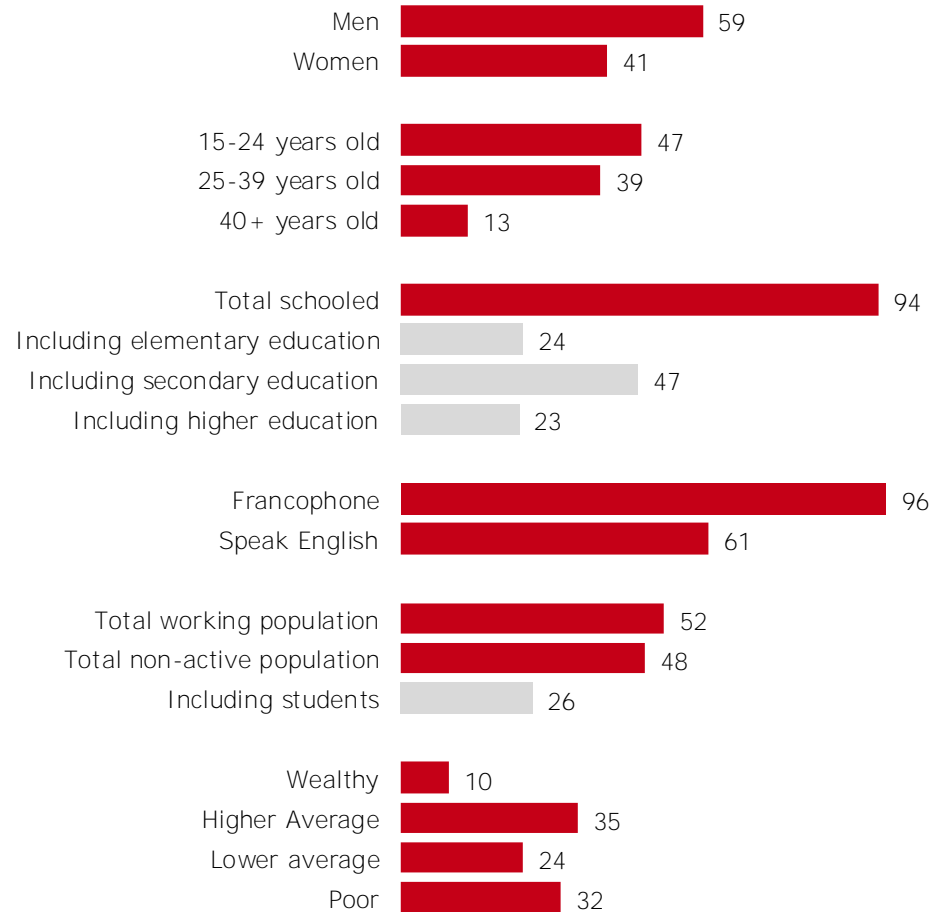
Focus on Internet consumption



35%

of the Senegalese population use the
Internet

Internet users profile



- 3 Democratic Republic of Congo



Kinshasa

Methodology



Survey universe: Individuals of 15 years old + living in DRC (Kinshasa)

Interrogation face to face at the interviewees' household

Method of quotas

- Gender
- Age (6 classes)
- Level of instruction (4 classes)
- Occupation of the interviewee

1 person eligible per household

Referring period: Monday – Sunday

Field period: 13th to 26th, June 2013

	Sample	Population (K)
Individuals of 15 years old and +	1136	5863
Including managers and executives	144	87

1% of average daily audience represents 58,630 people aged 15 and older.

DRC overview

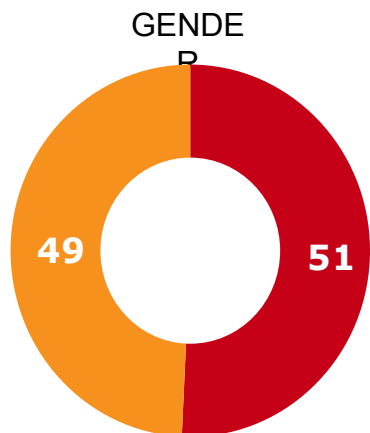
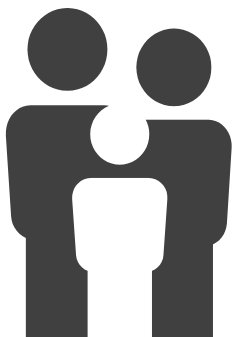
Surface	<i>2,344,860 km²</i>
Population	<i>65,965,795</i>
Projection 2050	<i>151,644,000</i>
Demographic growth	<i>2.7%</i>
GDP growth rate	<i>8.5% (2013 est.)</i>
Population under 15 y.o	<i>46%</i>
Median Age	<i>17.9</i>
Density of population	<i>29hab./km²</i>
Urban population	<i>35.9%</i>
Life expectancy	<i>48.4 years</i>
Infant mortality	<i>112%</i>
% Living below the poverty line	<i>63% (2006 est.)</i>
Literacy	<i>67%</i>
Human Development Index (HDI)	<i>Indicator : 0.286</i> <i>Rank : 187 (over 187 countries)</i>
Languages used	<i>French (official language)</i> <i>Lubas, Kongos, lentils, Zandés, Rundis, Tekes, bwas, Tchokwés, Ngalas ...</i>
Religions	<i>Catholics, Protestants, Muslims, Animists...</i>
Currency	<i>Congolese Franc (CDF)</i>
Exchange rate	<i>1 USD = 927 CDF</i>



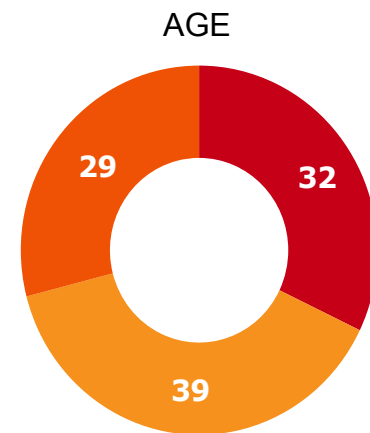
• Sources : UN data / CIA – The World Factbook / Jeuneafrique.com

Country Statistics

In 2013, the population of 15 years old and more in Kinshasa is estimated to 5,863,000 individuals.

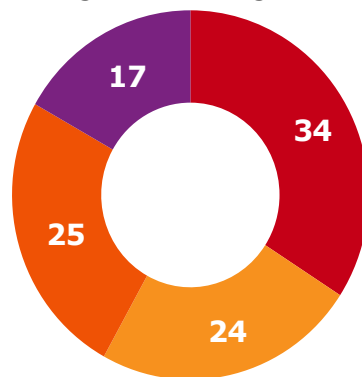


- Men
- Women



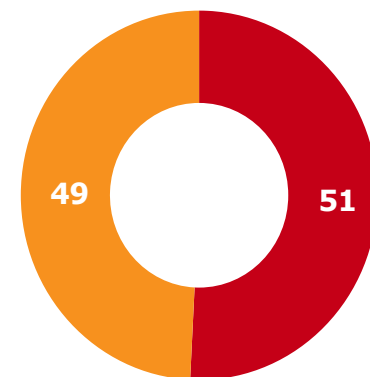
- 15-24 years old
- 25-39 years old
- 40+ years old

LIVING STANDARDS



- Wealthy
- Higher average
- Lower average
- Poor

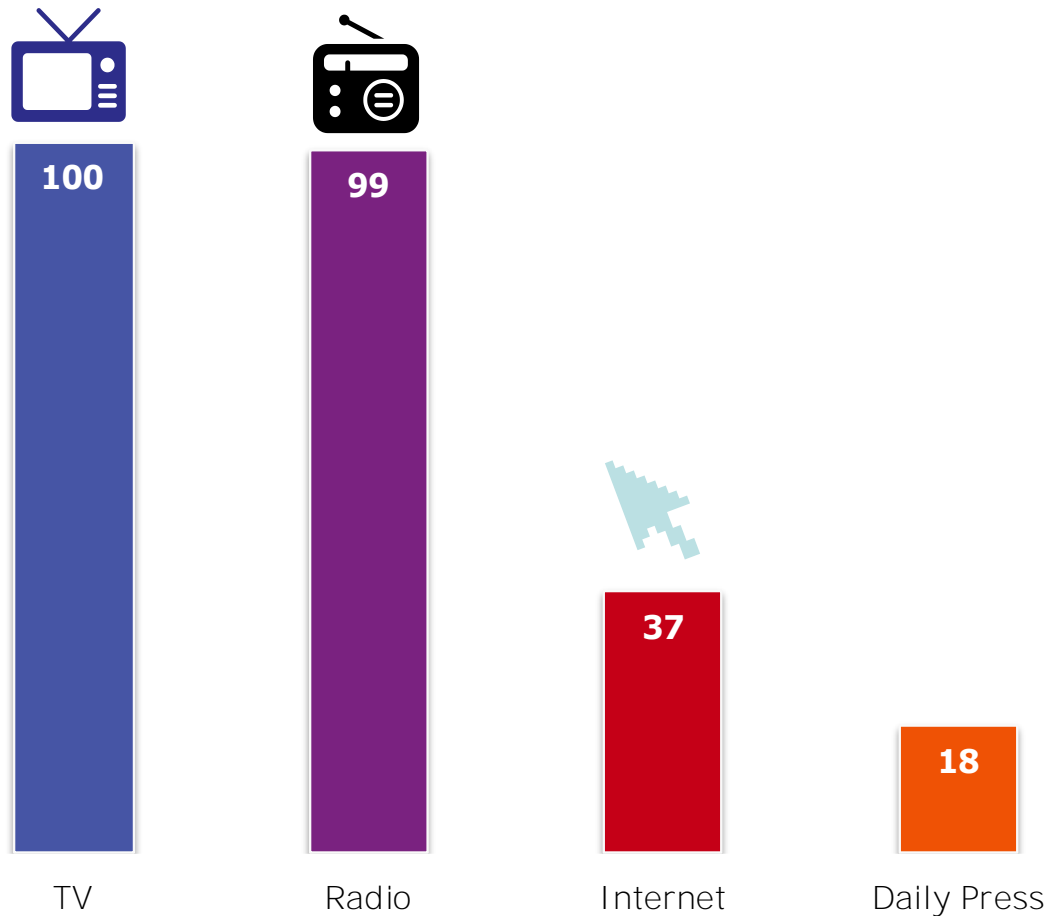
OCCUPATION



- Total working population
- Total non-active population

Focus on Media Consumption

The television is the first media in DRC, closely followed by the radio



Media habits – At least once a week (%)

Base : Total population

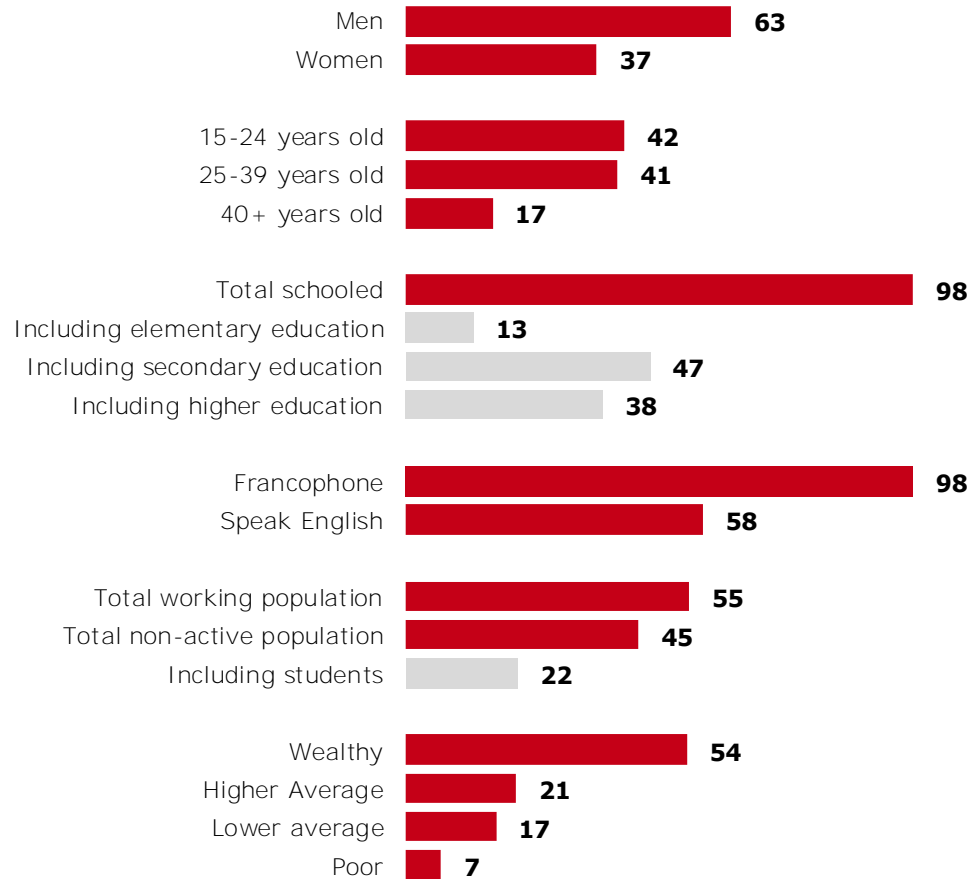
Focus on Internet consumption

Internet users profile



48%

of the DRC population use the
Internet



- 4 Gabon

Libreville



Methodology



Survey universe: Individuals of 15 years old + living in Gabon (Libreville)

Interrogation face to face at the interviewees' household

Method of quotas

- Gender
- Age (6 classes)
- Level of instruction (4 classes)
- Occupation of the interviewee

1 person eligible per household

Referring period: Monday – Sunday

Field period: 13th to 26th, November 2013



	Sample	Population (K)
Individuals of 15 years old and +	1109	396
Including managers and executives	150	11

1% of average daily audience represents 26,510 people aged 15 and older.

Gabon overview

Surface	267,670 km ²
Population	1,505,463
Projection 2050	2,488,000
Demographic growth	1.9%
GDP growth rate	5.6% (2013 est.)
Population under 15 y.o	35%
Median Age	18.6
Density of population	6 hab/km ²
Urban population	86.4%
Life expectancy	62.7 years
Infant mortality	54%
% Living below the poverty line	NA
Literacy	87.7%
Human Development Index (HDI)	<i>Indicator : 0.674</i> <i>Rank : 106 (over 187 countries)</i>
Languages used	<i>French (official language)</i> <i>Fangs, Pounous, Tékés, Myénés, Echiras, Adoumas, Kota.</i>
Religions	<i>Catholics, Protestants, Animists...</i>
Currency	<i>West African CFA franc (XOF)</i>
Exchange rate	<i>1 USD = 589 XOF</i>



• Sources : UN data / CIA – The World Factbook / Jeuneafrique.com

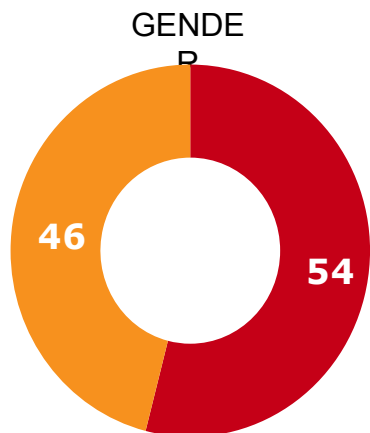
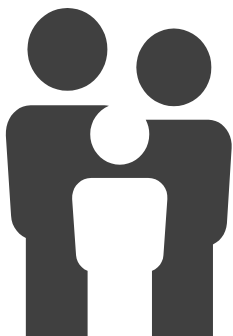
Country Statistics

In 2013, the population of 15 years

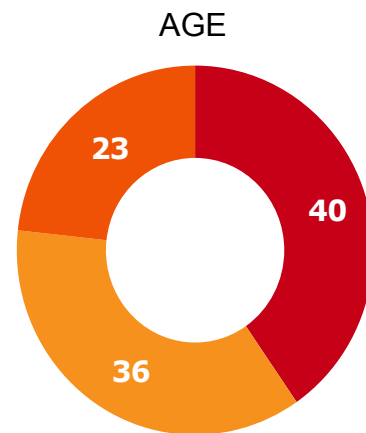
old and more in Libreville is

estimated to

396,000 individuals.

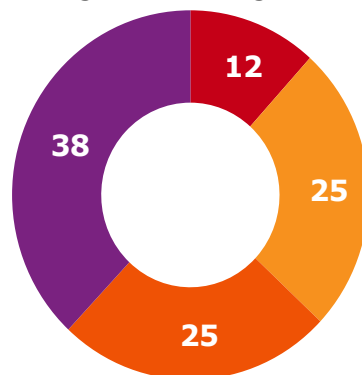


- Men
- Women



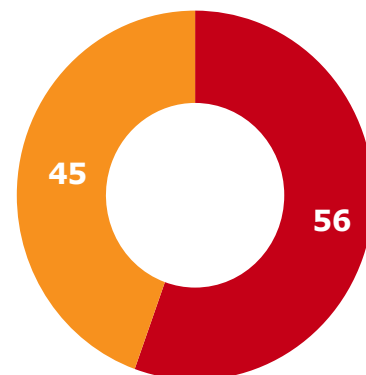
- 15-24 years old
- 25-39 years old
- 40+ years old

LIVING STANDARDS



- Wealthy
- Higher average
- Lower average
- Poor

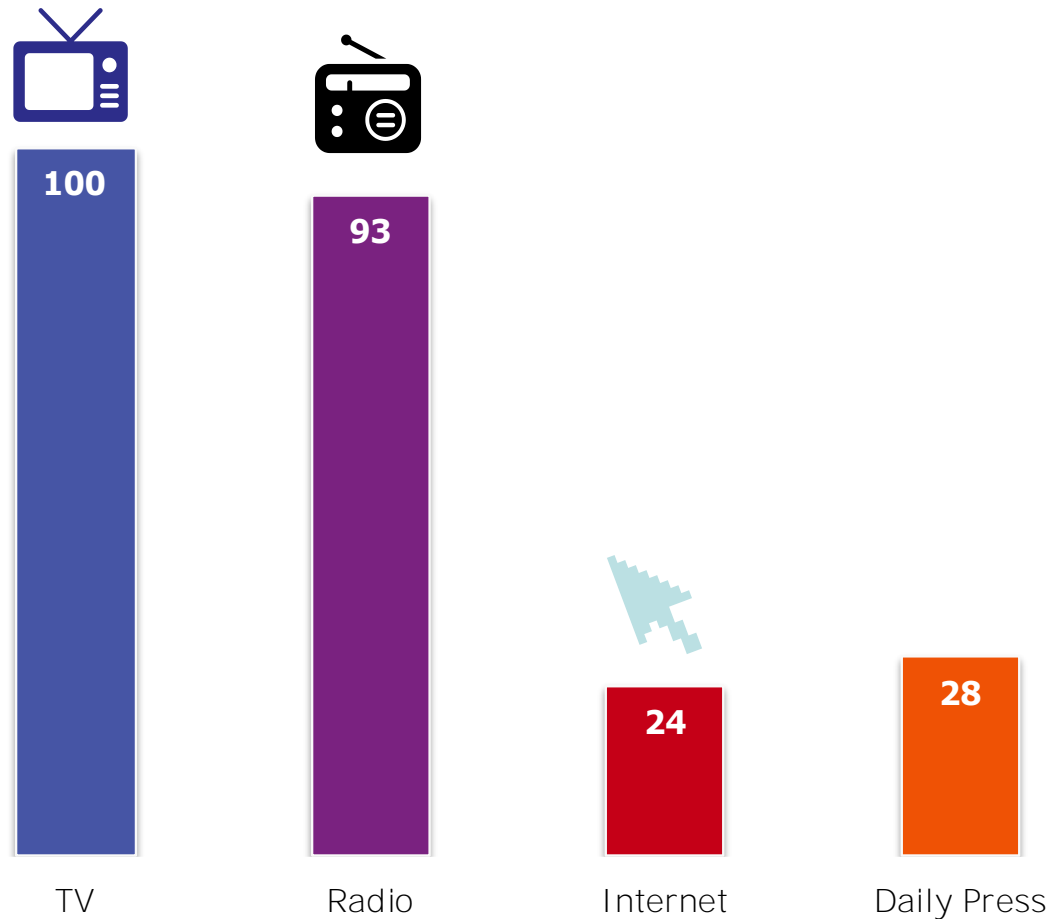
OCCUPATION



- Total working population
- Total non-active population

Focus on Media Consumption

The television is the first media in Gabon, followed by the radio



Media habits – At least once a week (%)

Base : Total population

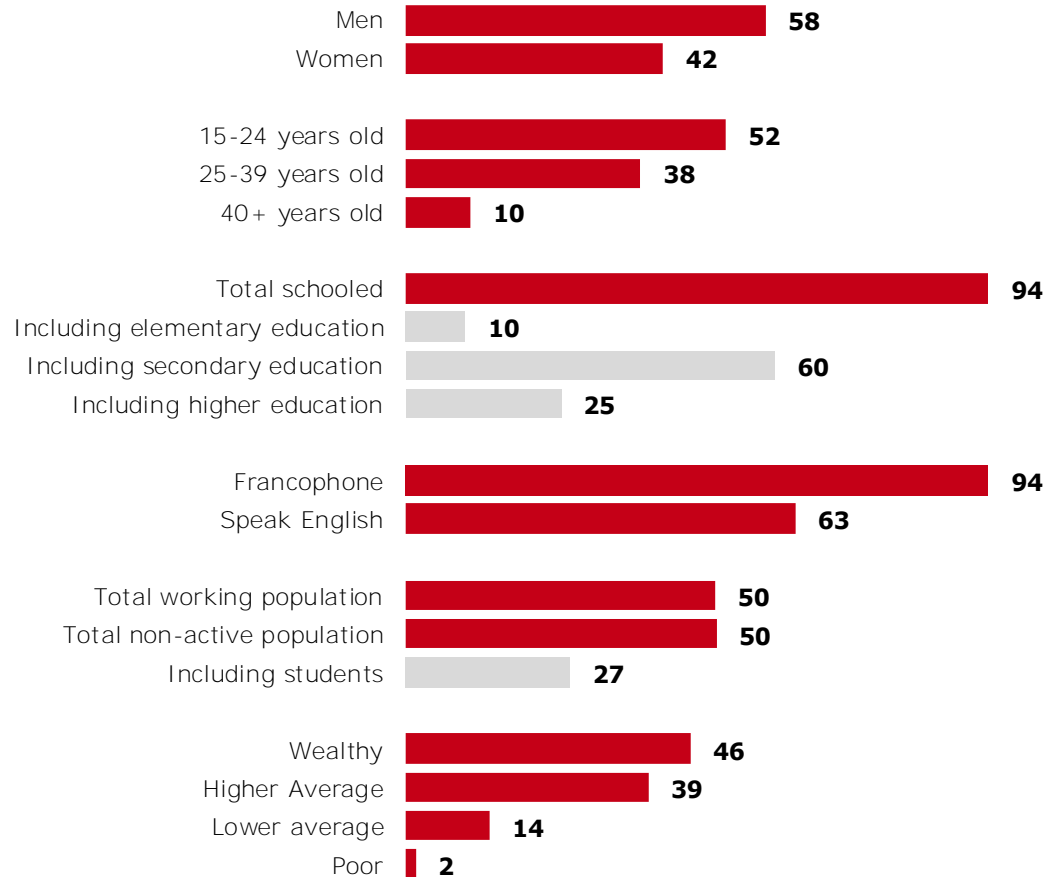
Focus on Internet consumption



42%

of the Gabonese population use the Internet

Internet users profile



- 5 Mali
Bamako



Methodology



Survey universe: Individuals of 15 years old + living in Mali (Bamako)

Interrogation face to face at the interviewees' household

Method of quotas

- Gender
- Age (6 classes)
- Level of instruction (4 classes)
- Occupation of the interviewee

1 person eligible per household

Referring period: Monday – Sunday

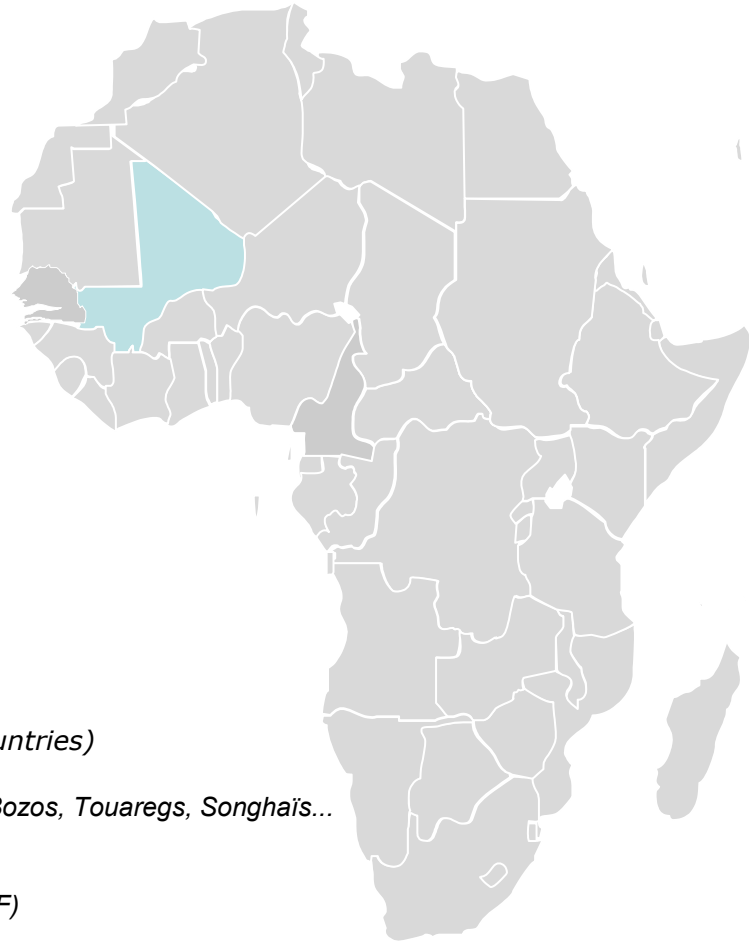
Field period: 6th to 19th, December 2013

	Sample	Population (K)
Individuals of 15 years old and +	1112	1094
Including managers and executives	106	16

1% of average daily audience represents 26,110 people aged 15 and older.

Mali overview

Surface	<i>1,240,190 km²</i>
Population	<i>15,369,803</i>
Projection 2050	<i>41,976,000</i>
Demographic growth	<i>3.1%</i>
GDP growth rate	<i>1.7% (2013 est.)</i>
Population under 15 y.o	<i>47%</i>
Median Age	<i>16</i>
Density of population	<i>11hab/km²</i>
Urban population	<i>36.6%</i>
Life expectancy	<i>51.4 years</i>
Infant mortality	<i>99%</i>
% Living below the poverty line	<i>36.1% (2005 est.)</i>
Literacy	<i>26.2%</i>
Human Development Index (HDI)	<i>Indicator : 0.359 Rank : 175 (over 187 countries)</i>
Languages used	<i>French (official language) Bambaras, Peuls, Dogons, Bozos, Touaregs, Songhaïs...</i>
Religions	<i>Muslims</i>
Currency	<i>West African CFA franc (XOF)</i>
Exchange rate	<i>1 USD = 589 XOF</i>

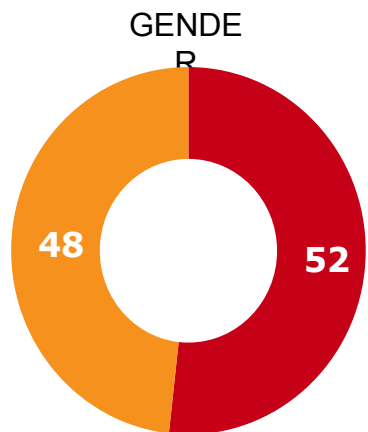
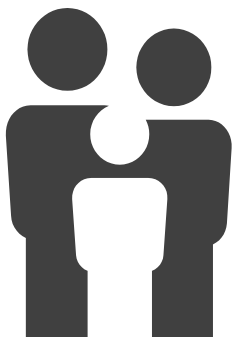


• Sources : UN data / CIA – The World Factbook / Jeuneafrique.com

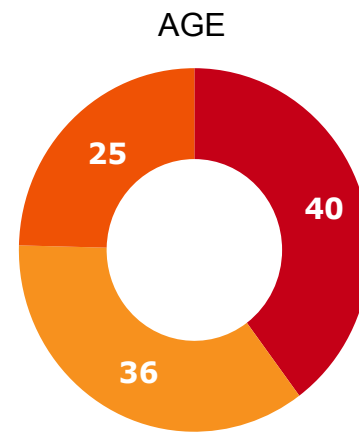
Country Statistics

In 2013, the population of 15 years old and more in Bamako is estimated to

1,094,000 individuals.

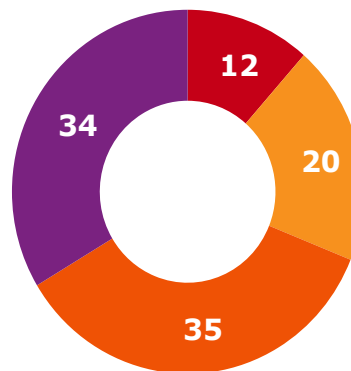


■ Men
■ Women



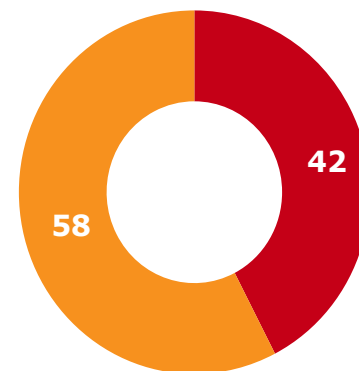
■ 15-24 years old
■ 25-39 years old
■ 40+ years old

LIVING STANDARDS



■ Wealthy
■ Higher average
■ Lower average
■ Poor

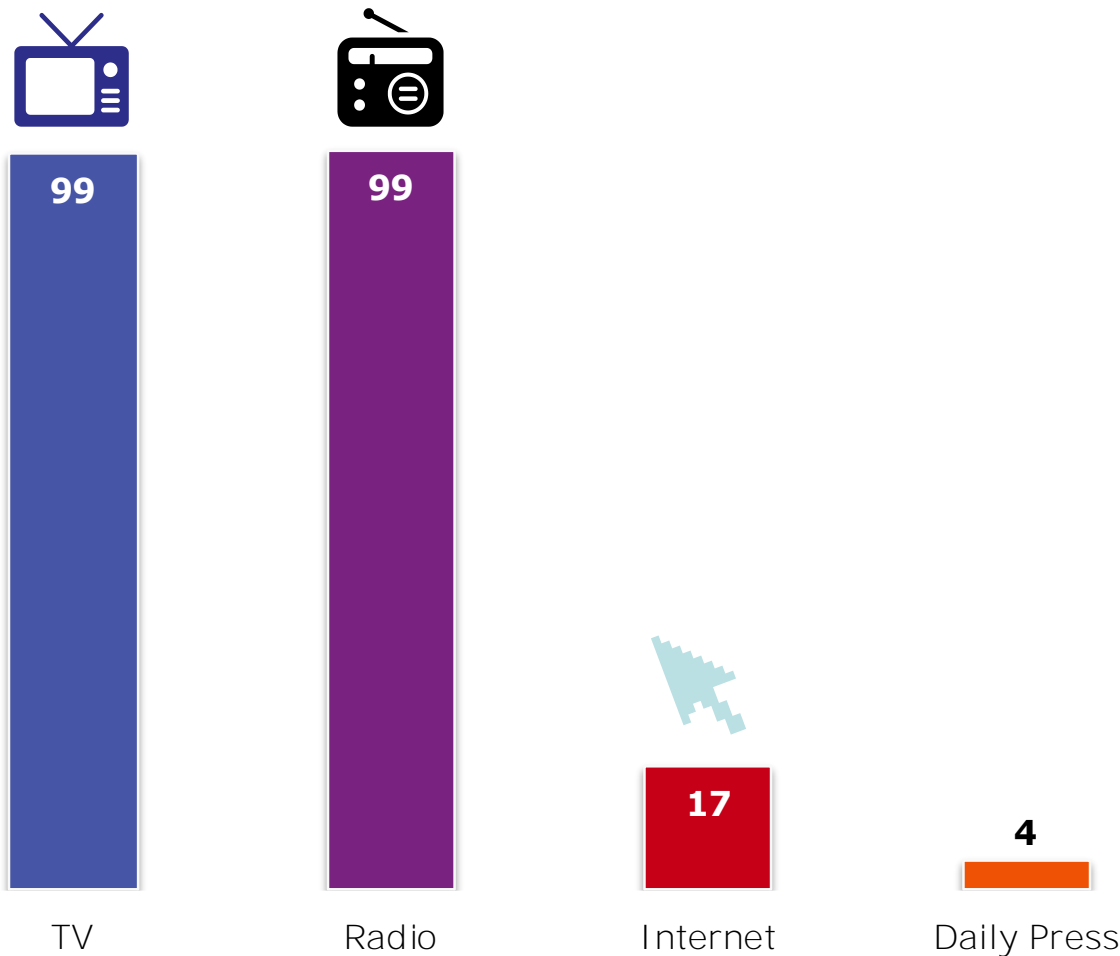
OCCUPATION



■ Total working population
■ Total non-active population

Focus on Media Consumption

The television and the radio are the main media in Mali



Media habits – At least once a week (%)

Base : Total population

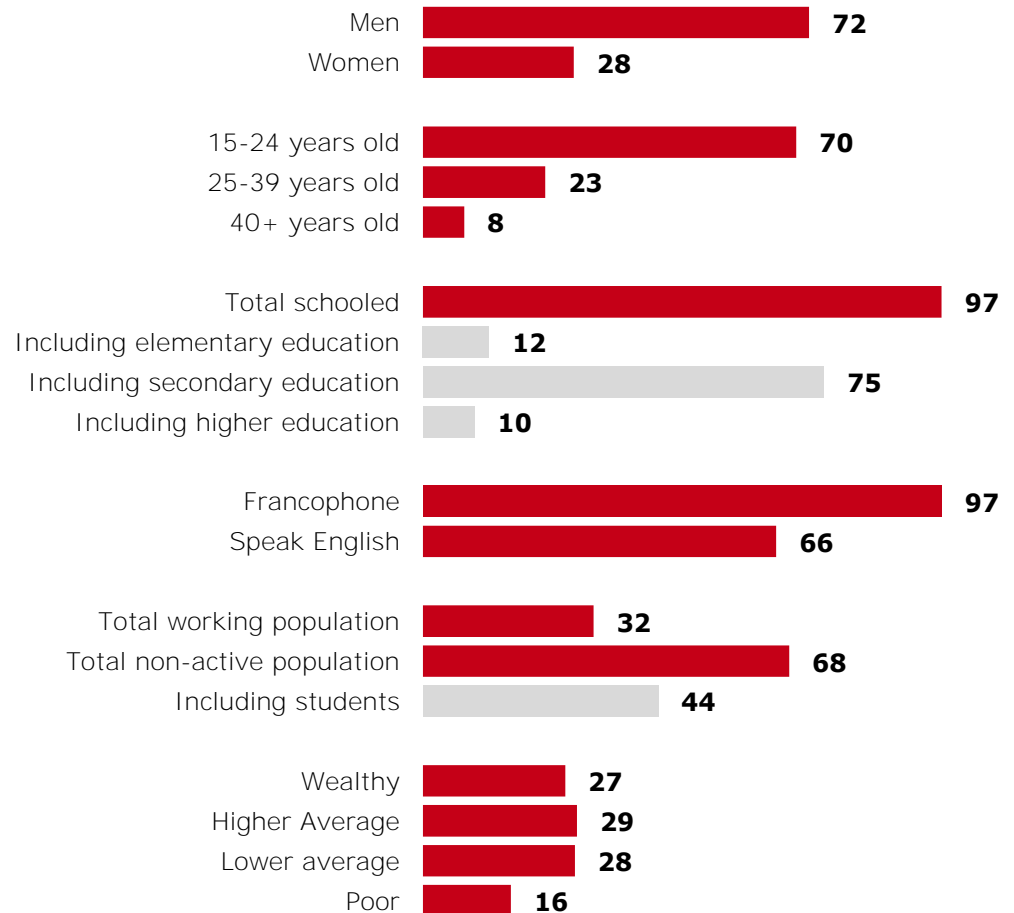
Focus on Internet consumption

Internet users profile



25%

of the Malian population use the Internet



• 6 Cameroon

Douala/Yaounde



Methodology



Survey universe: Individuals of 15 years old + living in Cameroon (Douala / Yaounde)

Interrogation face to face at the interviewees' household

Method of quotas

- Gender
- Age (6 classes)
- Level of instruction (4 classes)
- Occupation of the interviewee

1 person eligible per household

Referring period: Monday – Sunday

Field period: 15th to 28th, March 2013



	Sample	Population (K)
Individuals of 15 years old and +	1882	2611
Including managers and executives	113	28

1% of average daily audience represents 26,110 people aged 15 and older.

Cameroon overview

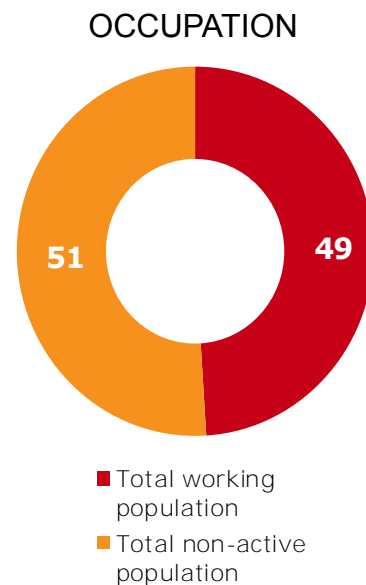
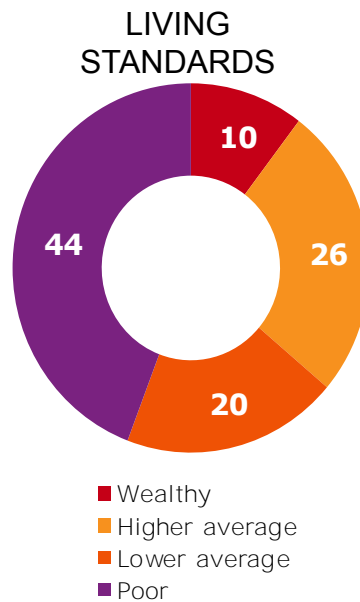
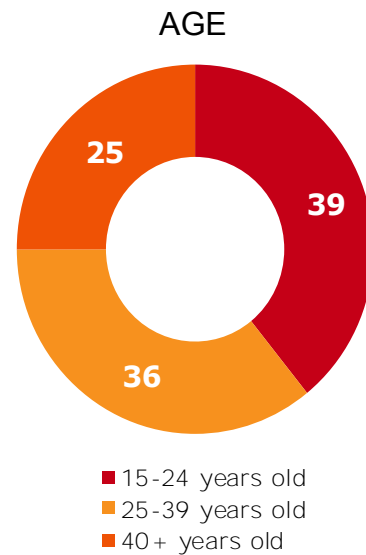
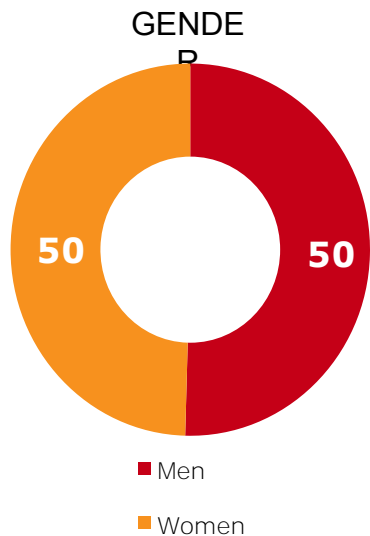
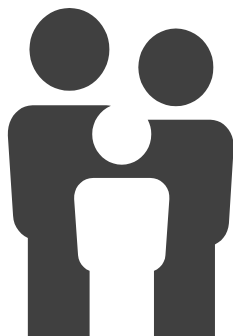
Surface	<i>475,440 km²</i>
Population	<i>19,598,889</i>
Projection 2050	<i>24,948,000</i>
Demographic growth	<i>2.2%</i>
GDP growth rate	<i>5.5% (2013 est.)</i>
Population under 15 y.o	<i>40%</i>
Median Age	<i>18.3</i>
Density of population	<i>47hab/km²</i>
Urban population	<i>59.2%</i>
Life expectancy	<i>51.6 years</i>
Infant mortality	<i>84%</i>
% Living below the poverty line	<i>48% (2000 est.)</i>
Literacy	<i>70.7%</i>
Human Development Index (HDI)	<i>Indicator : 0.482</i> <i>Rank : 150 (over 187 countries)</i>
Languages used	<i>French and English (official languages)</i> <i>Ewondos, Peuls, Betis-Bulus, Bamilékés, Doualias, Bassas...</i>
Religions	<i>Christians, Muslims, Animists, etc.</i>
Currency	<i>West African CFA franc (XOF)</i>
Exchange rate	<i>1 USD = 589 XOF</i>



• Sources : UN data / CIA – The World Factbook / Jeuneafrique.com

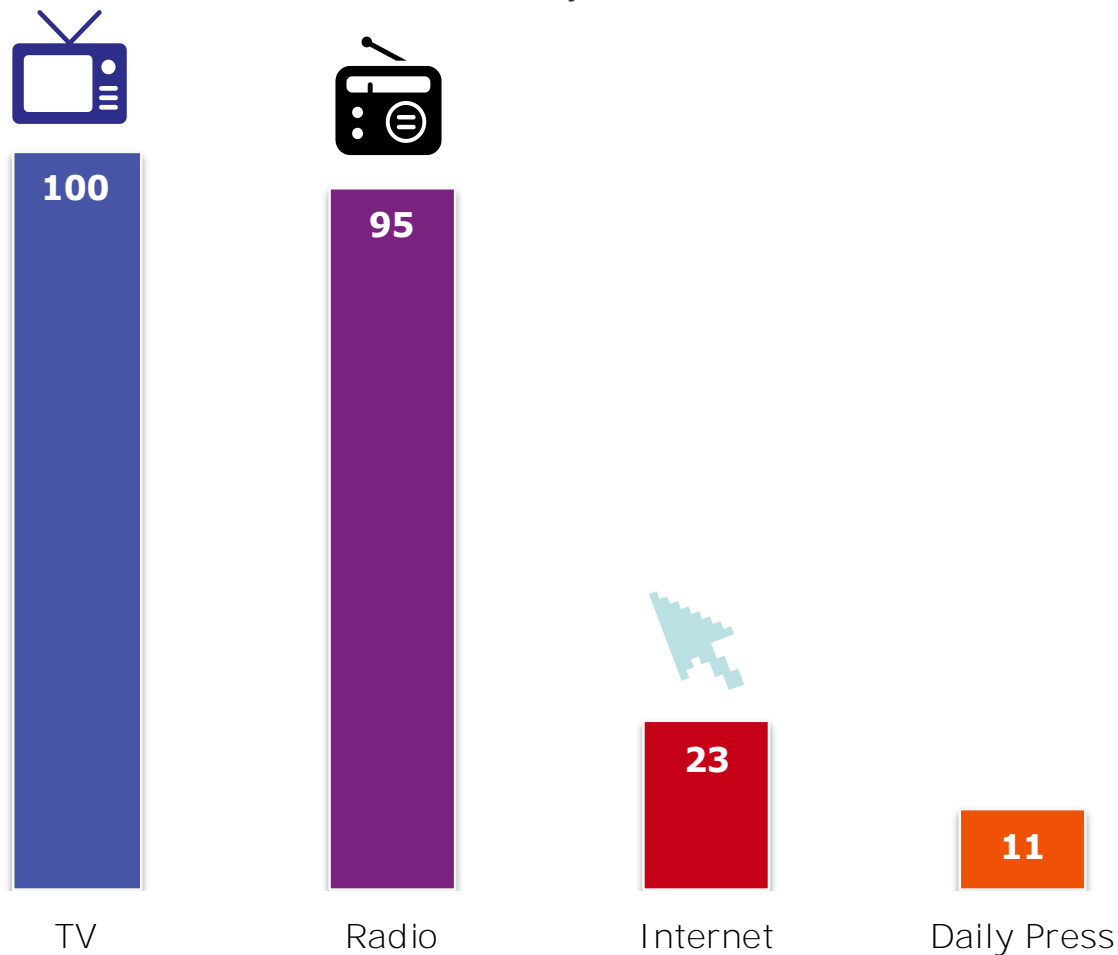
Country Statistics

In 2013, the population of 15 years old and more in Douala and Yaounde is estimated to **2,661,000** individuals.



Focus on Media Consumption

The television is the first media in Cameroon, followed by the radio



Media habits – At least once a week (%)

Base : Total population

Focus on Internet consumption

Internet users profile



40%

of the Cameroonian population use
the Internet

