Kenya

Navigating the New Normal

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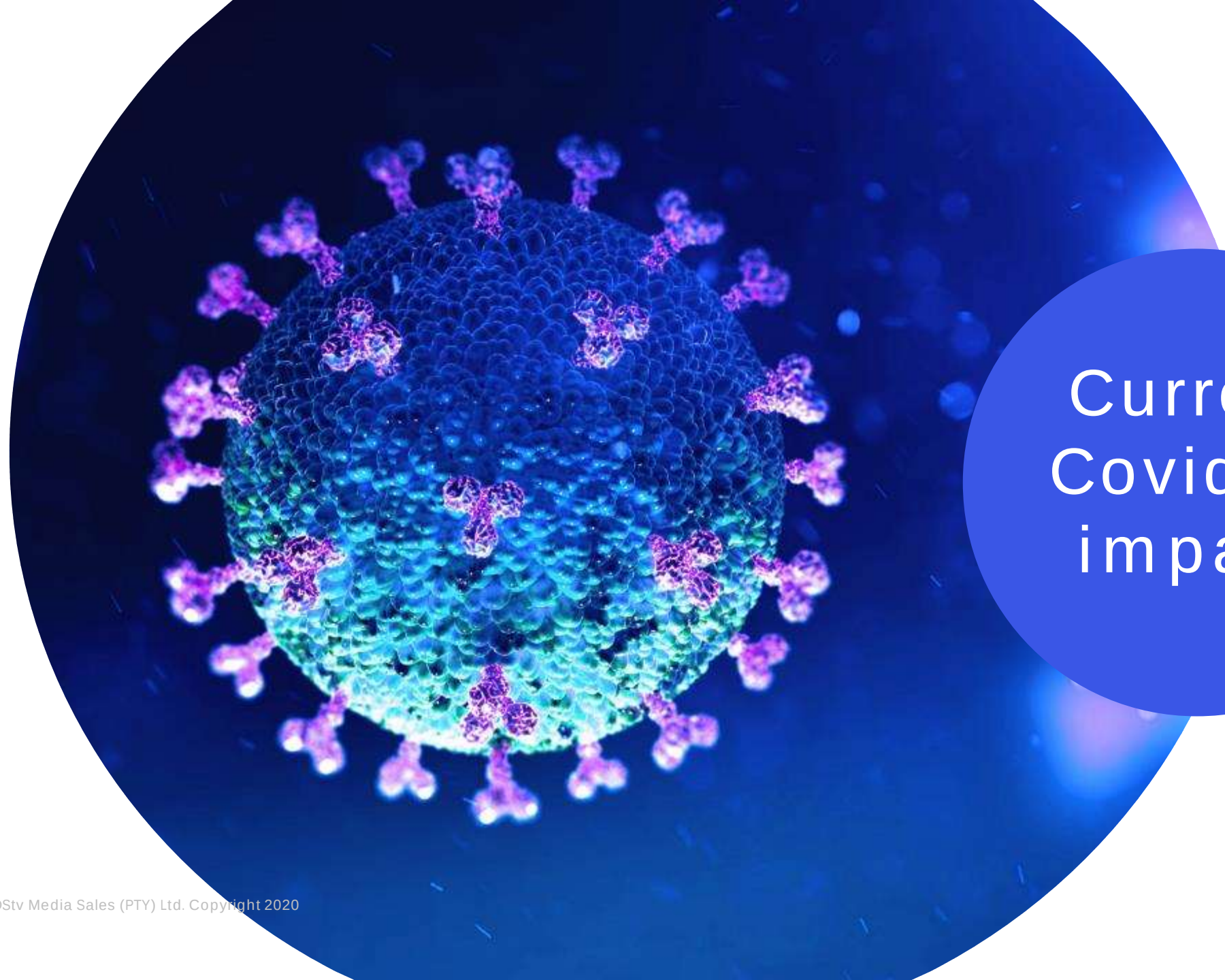

Current Covid-19 impact

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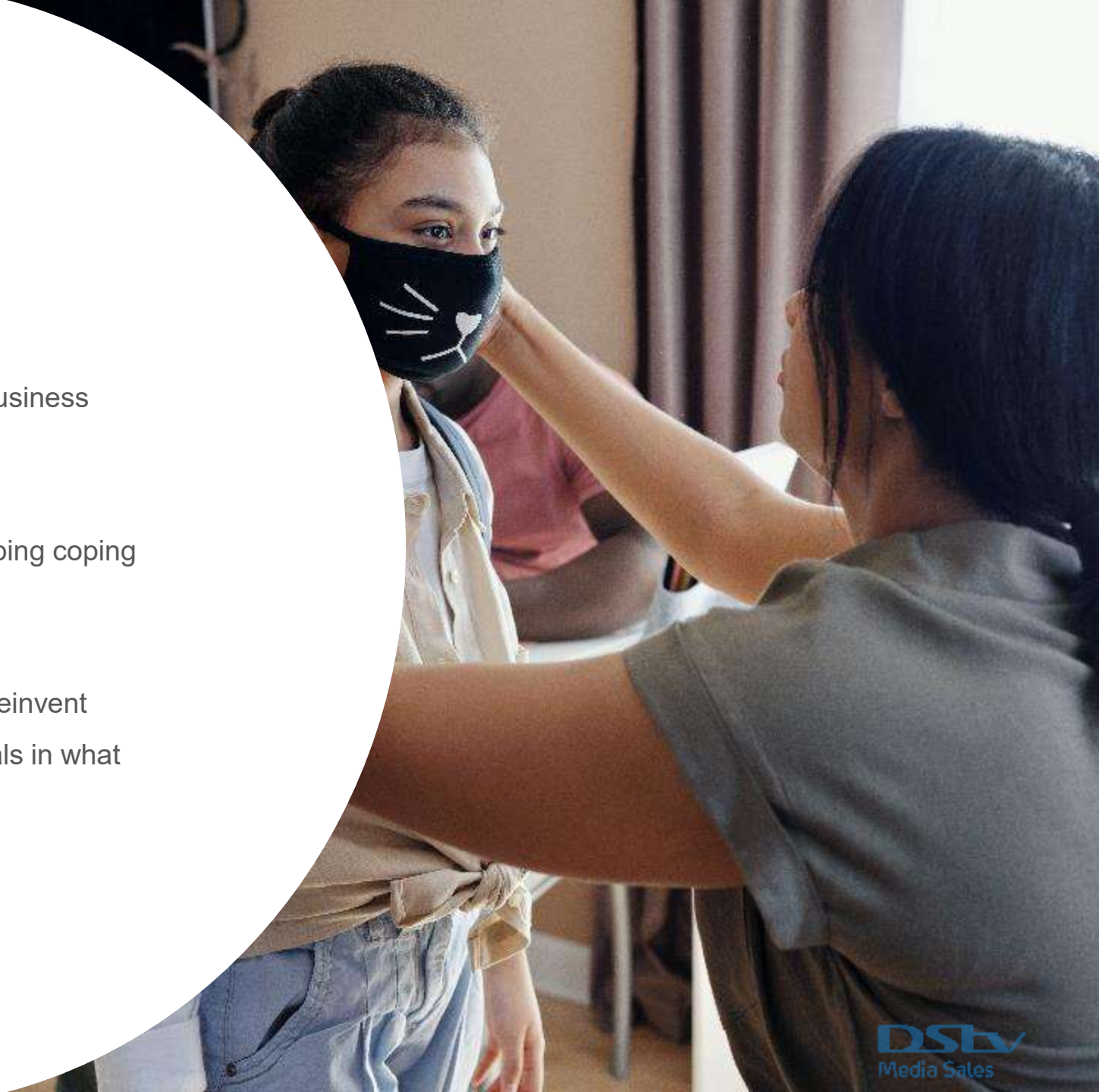
Social Distancing

- This Covid-19 pandemic has disrupted consumer and business practices across the world.
- It has lead both companies and consumers into developing coping mechanism in navigating this brave new world.
- The pandemic has called for people and companies to reinvent themselves to achieve their individual and collective goals in what will now be the new normal.



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Impacted industry sectors

#stayathome:
confinements, curfews and quarantines.

More than half of the world's population has been mandated to stay at home, by their governments, to curb the spread of the Covid-19 virus

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Organisations State that Covid-19 Has Accelerated Their Digital Transformation

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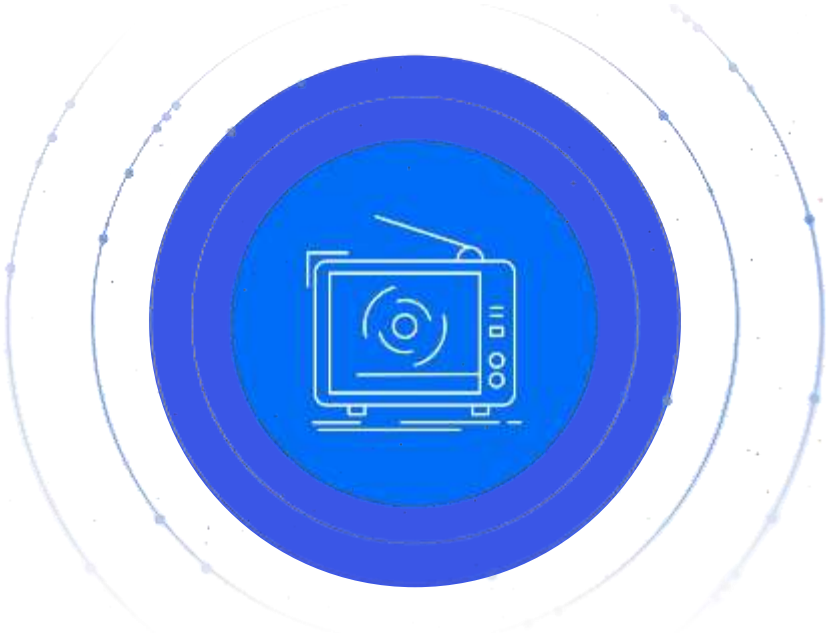
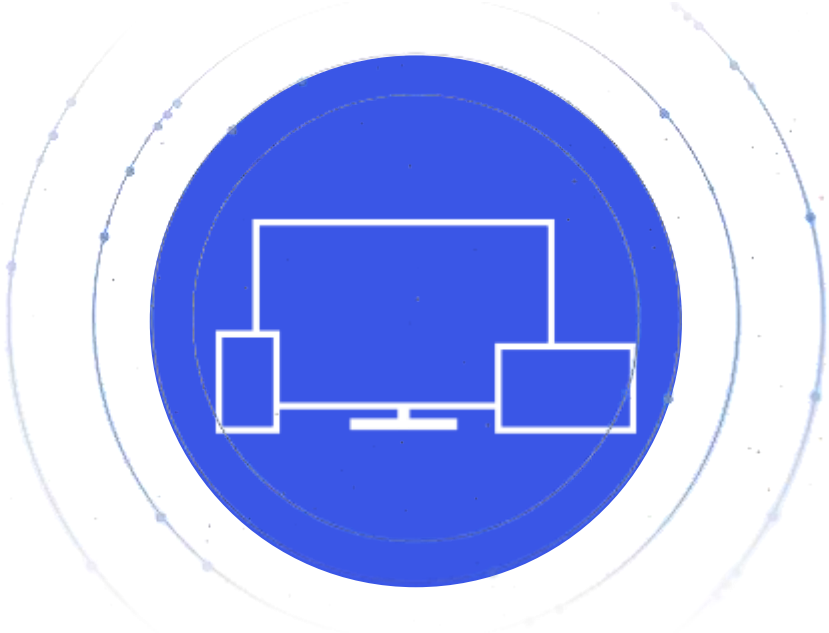
And while there is uncertainty…

What we do know for sure is that consumption of video content has grown with the emergence of COVID-19. From the need to stay informed to watching entertaining content. Video content consumption has seen a rise across TV & Digital.





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Platform Update

1 Open Periods & Broader Access

SPORT CHANNEL OPEN WEEKS:
18 March – 11 June

- SuperSport 1 down to Compact
- SuperSport 4 down to Family
- SuperSport 7 down to Access
- Keep Fit Channel

20 March – 14 June
- CNN

SuperSport
World of Champions

2 Pop Up Channels

- Mindset: 1 April – 30 June
- M-Net Binge: 27 March – 31 July

3 Free Access to News Channels

- CNN
- eNCA
- Sky News
- BBC World News
- Newzroom Afrika
- Africa News
- Euronews

DStv Now

The news channels are accessible to everyone, via the DStv Now App, regardless of whether they subscriber to MultiChoice or not

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Kenya Viewership Trends

TV Viewership Grows Across the World

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DStv Viewing Trends in Kenya

+18%
Apr 2020 vs 2019

+15%
Apr 2020 vs 2019

+22%
Apr 2020 vs 2019

Average Weekly Reach

683,545 unique reach across the DMS channels, from 558,698 in April 2019

Average Viewers

Averaging 52,470 viewing a day, with viewership building strongly across the day, starting as early as 9am

Time Spent Viewing

Averaging 2h40mins for a single viewing session, from 2hrs04mins, at the same time last year

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Source: DStv-i, April 2020 vs 2019, All Adults, 15+

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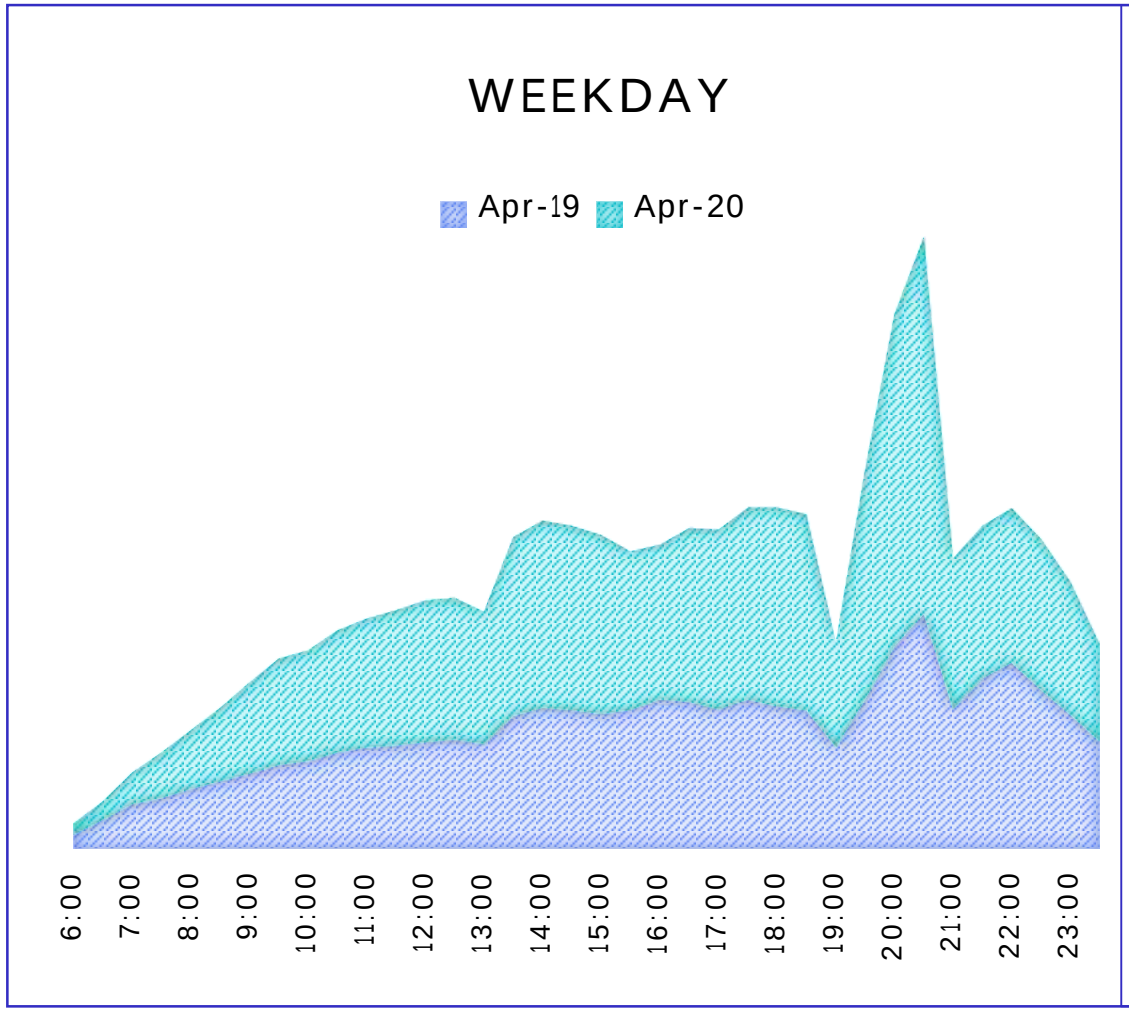
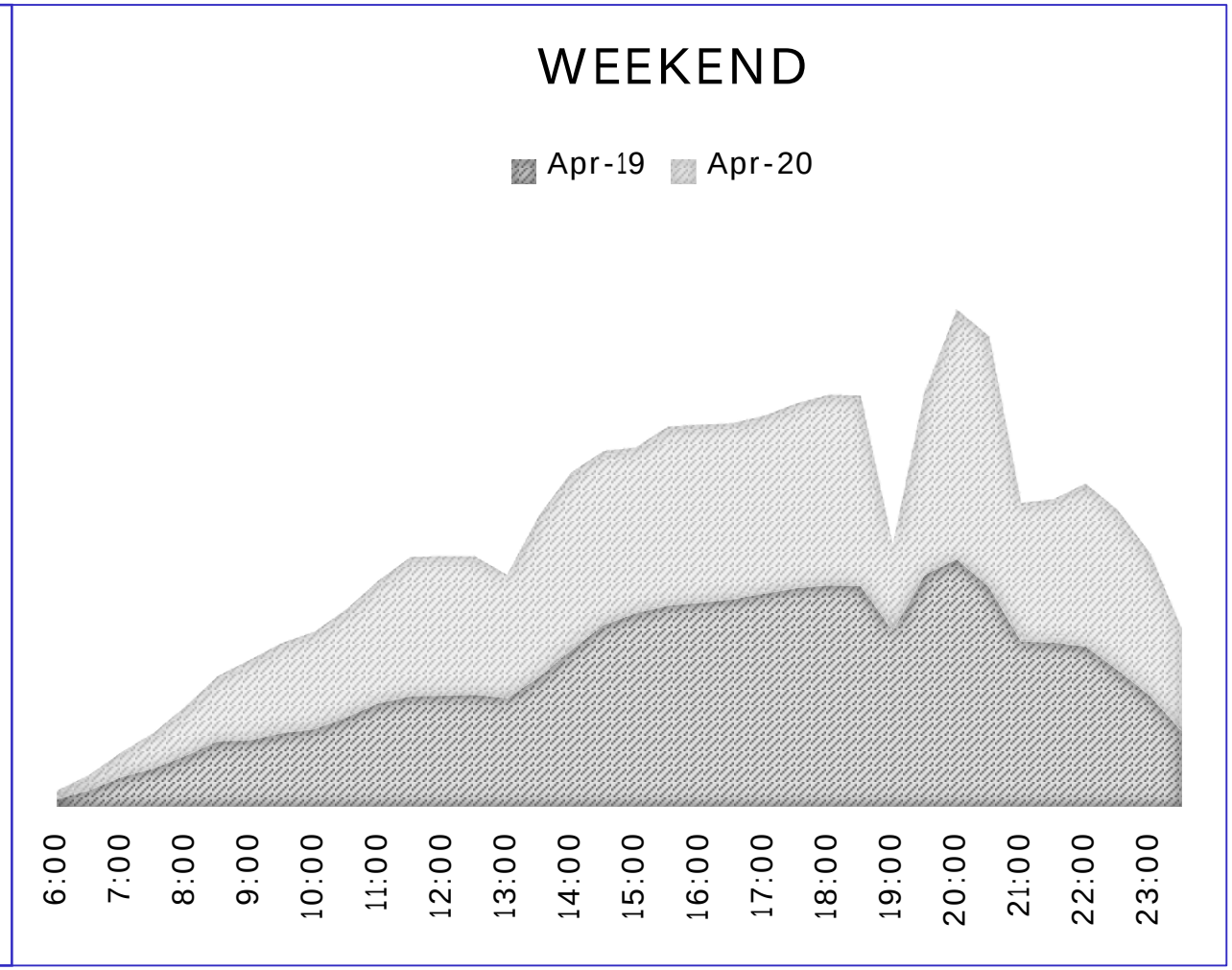
TV Viewership Trends: Kenya Data:

Year on Year: Month of April





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Source: Instar DStv-I | Kenya Adults 15+ | DMS Commercial Channels| April 2020 vs April 2019|

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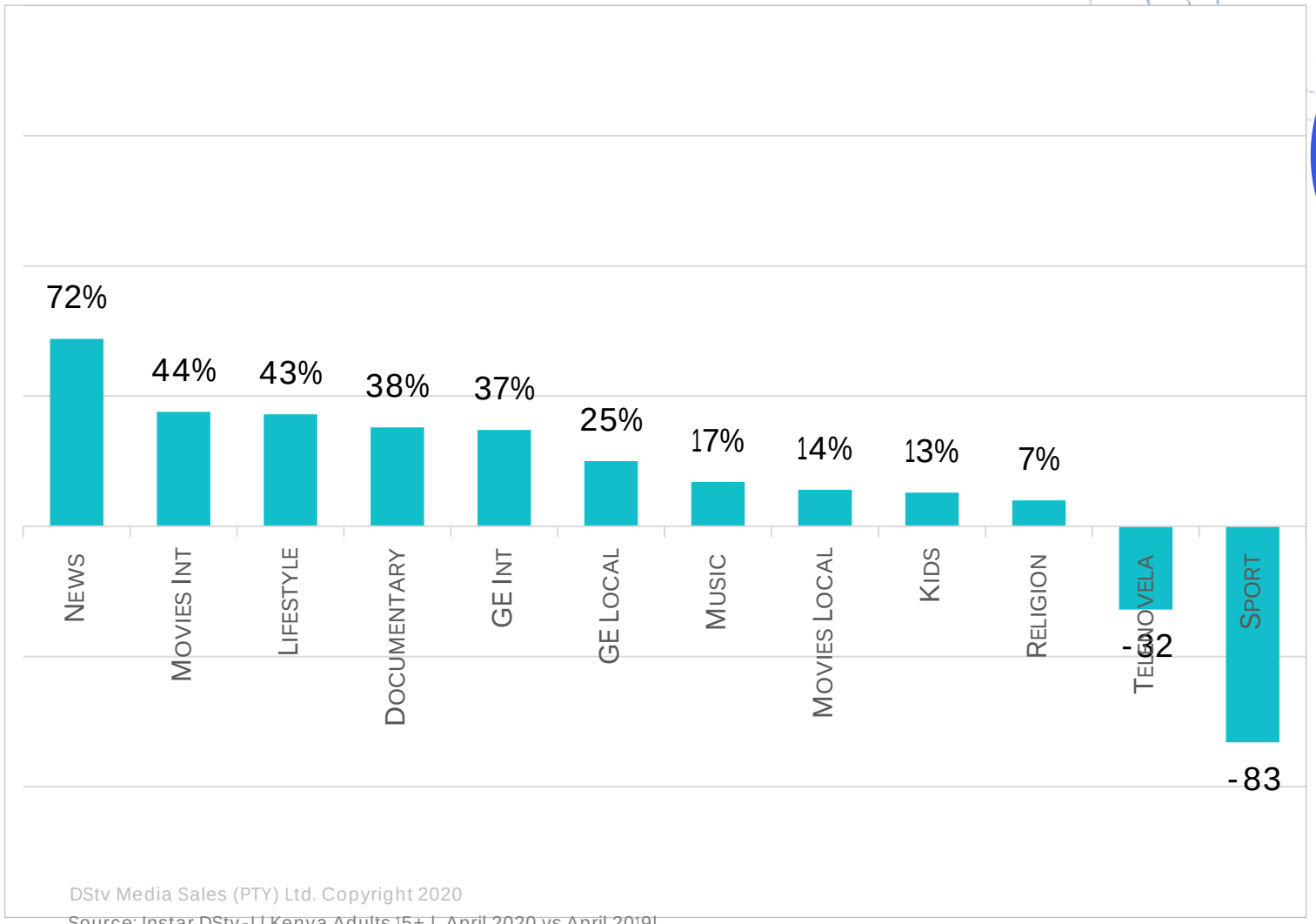
Genre Viewership Changes



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Source: Instar DStv-I | Kenya Adults 15+ | April 2020 vs April 2019|

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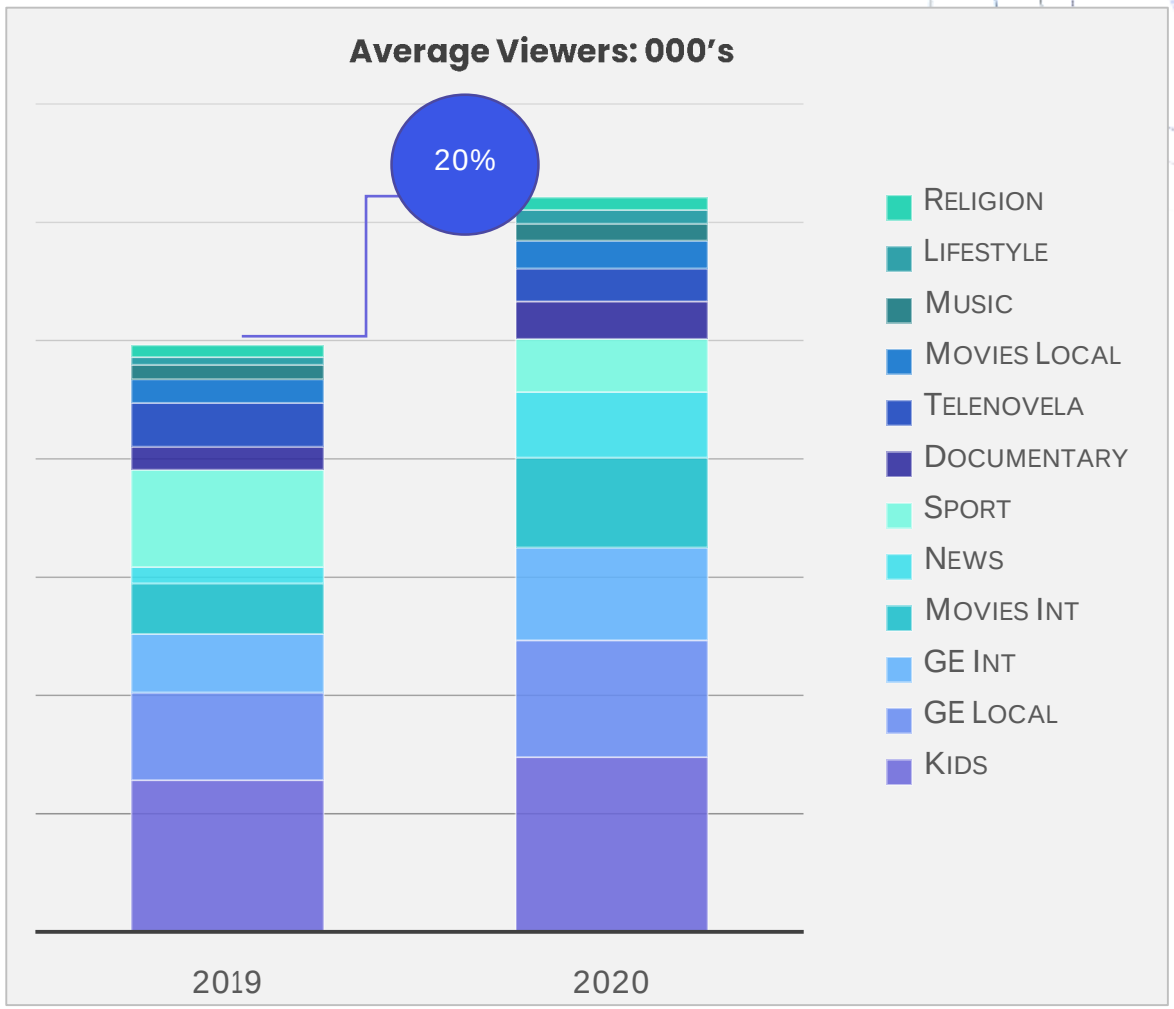
Genre Viewership



In terms of size of audience, General Entertainment continues to entice the biggest volume of viewers, driven by local content.

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Source: Instar DStv-I | Kenya Adults 15+ | DMS Commercial Channels| April 2020 vs April 2019|

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Viewership Trends

Maisha Magic Channels

Local Content channels remain the staple

Local Content channels remain the staple

+26% YoY

Movie Channels

*Movie Channels experience growth

MOVIES ZONE
+33% YoY

MOVIES ACTION+
+67% YoY

MOVIES ACTION
+170% YoY

MOVIES ALL STARS
+53% YoY

MOVIES PREMIERE
+78% YoY

MOVIES SMILE
+45% YoY

International Channels

*International GE Channels brings mass appeal

TELEMUNDO
+27% YoY

CITY HOME OF HEROES
+11% YoY

+212% YoY

+58% YoY

+45% YoY

BBC lifestyle
+36% YoY

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GOtv

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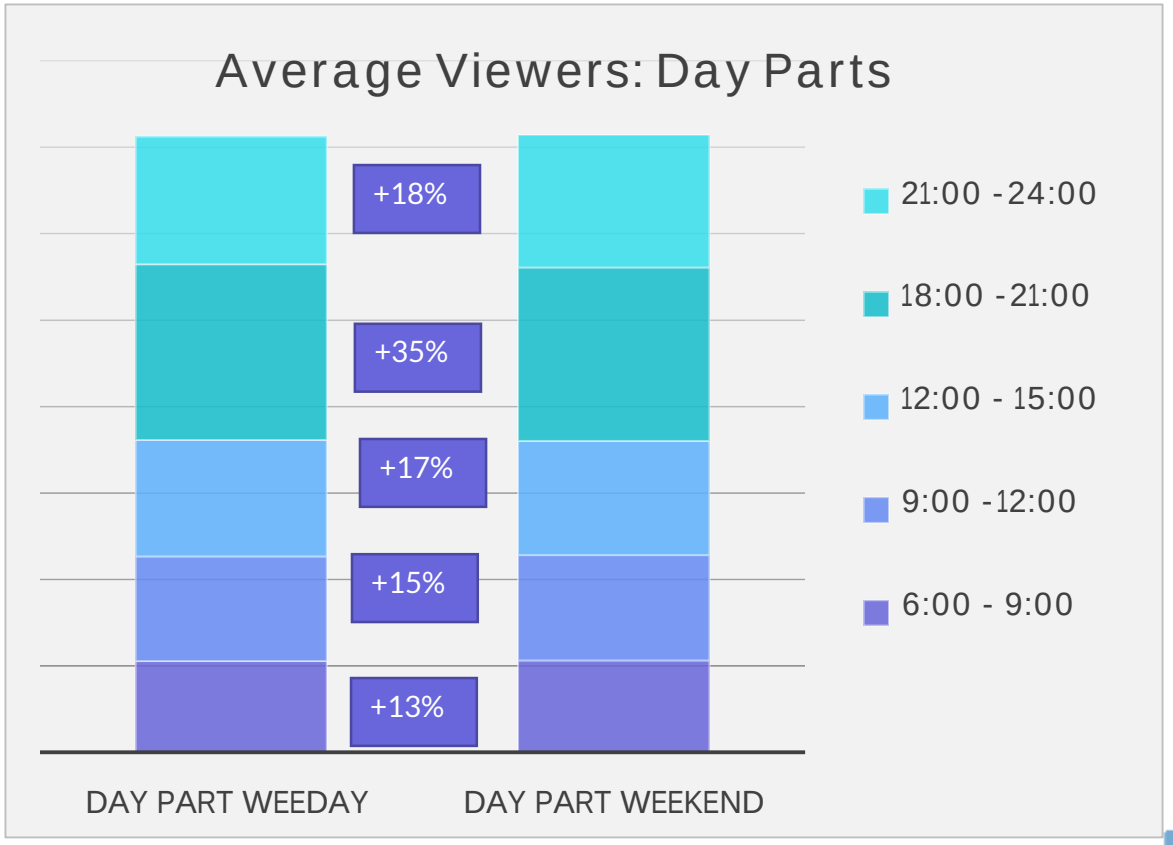
GOtv Viewership Overview

- General Entertainment in the local channels genre delivers the highest proportion of viewership and the biggest share of audience on GOtv, followed by movies
- Top performing DMS channels on GOtv include:



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Source: GOtv-i, April 2020 vs 2019, Household Data Kenya

On-The-Go Content Consumption

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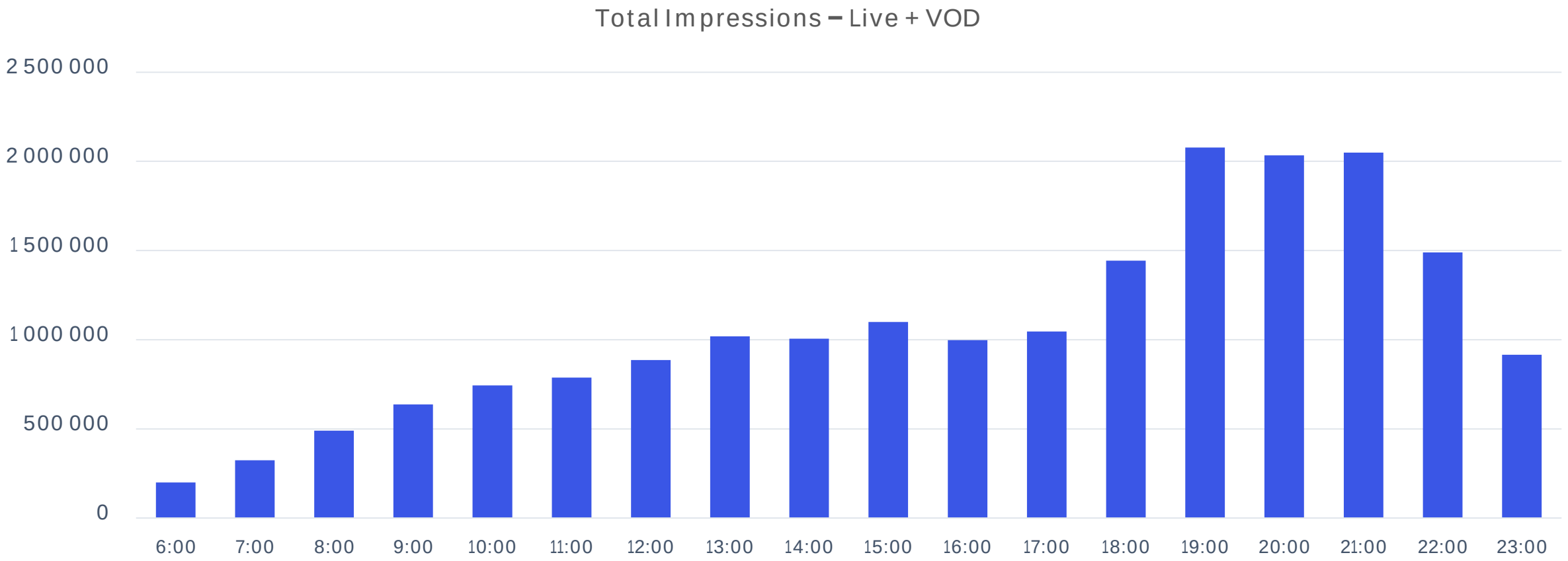
DStv Now Timeband Access Distribution Occurring as early at 6am and building to a peak at 9pm



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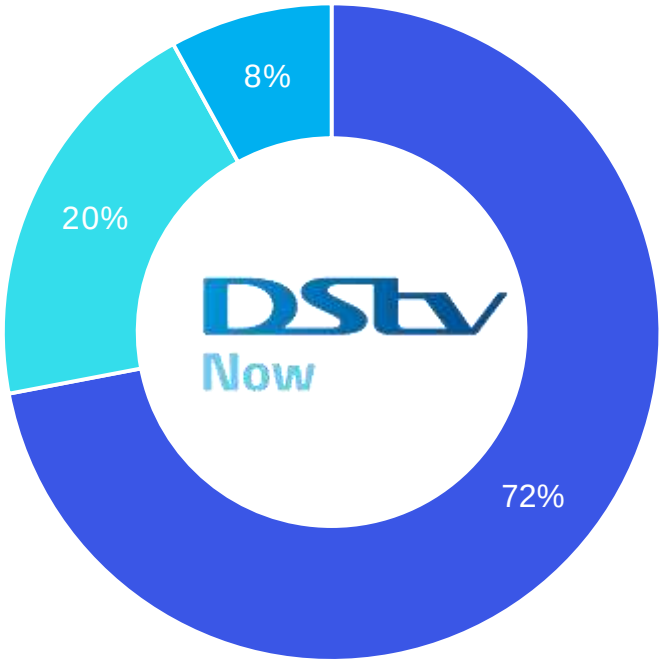
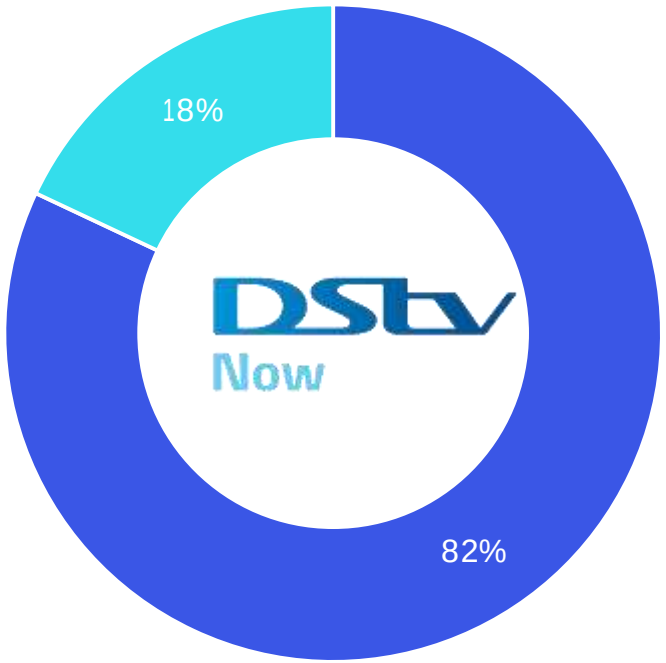
Source: Amplitude as at Apr1-30 2020

Accessing The Platform Is Mostly Via Mobile Live Shows Predominantly Watched



Mobile Web Leanback



Live VOD

VOD: Video-On-Demand (Catch-up)
Lean Back: Smart TV connected to Internet

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Source: Amplitude as at Apr1-30 2020

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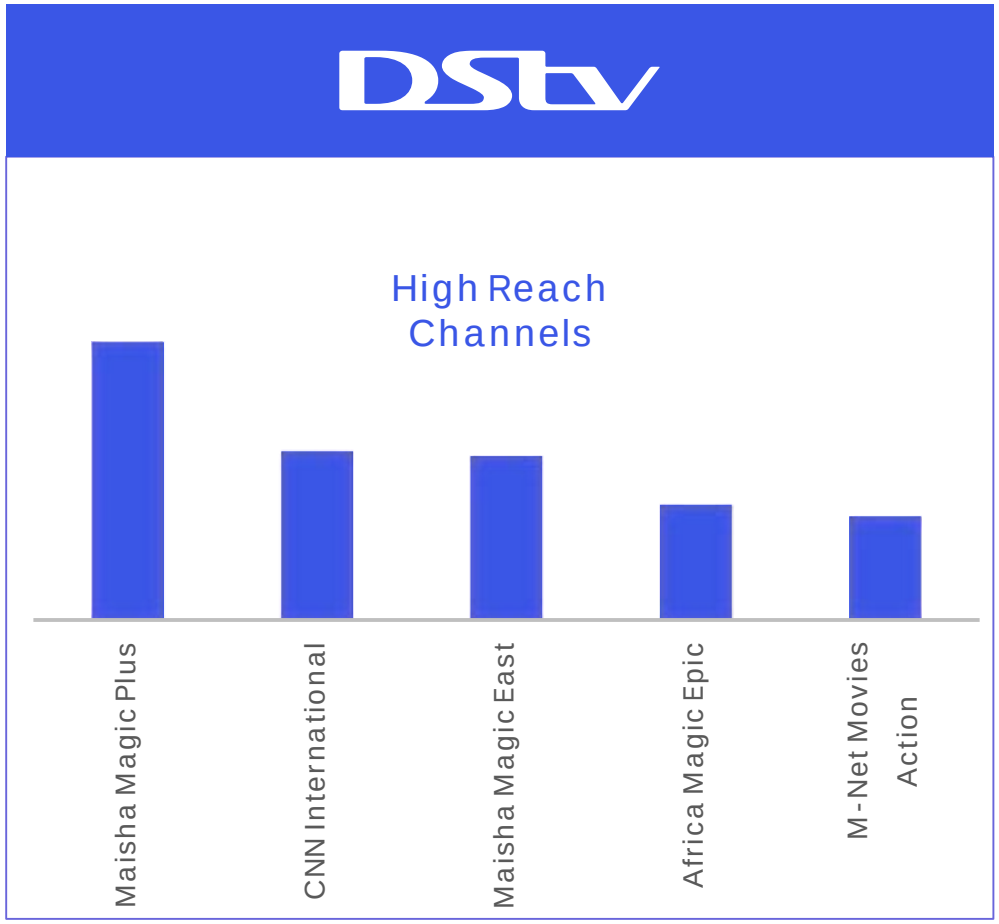
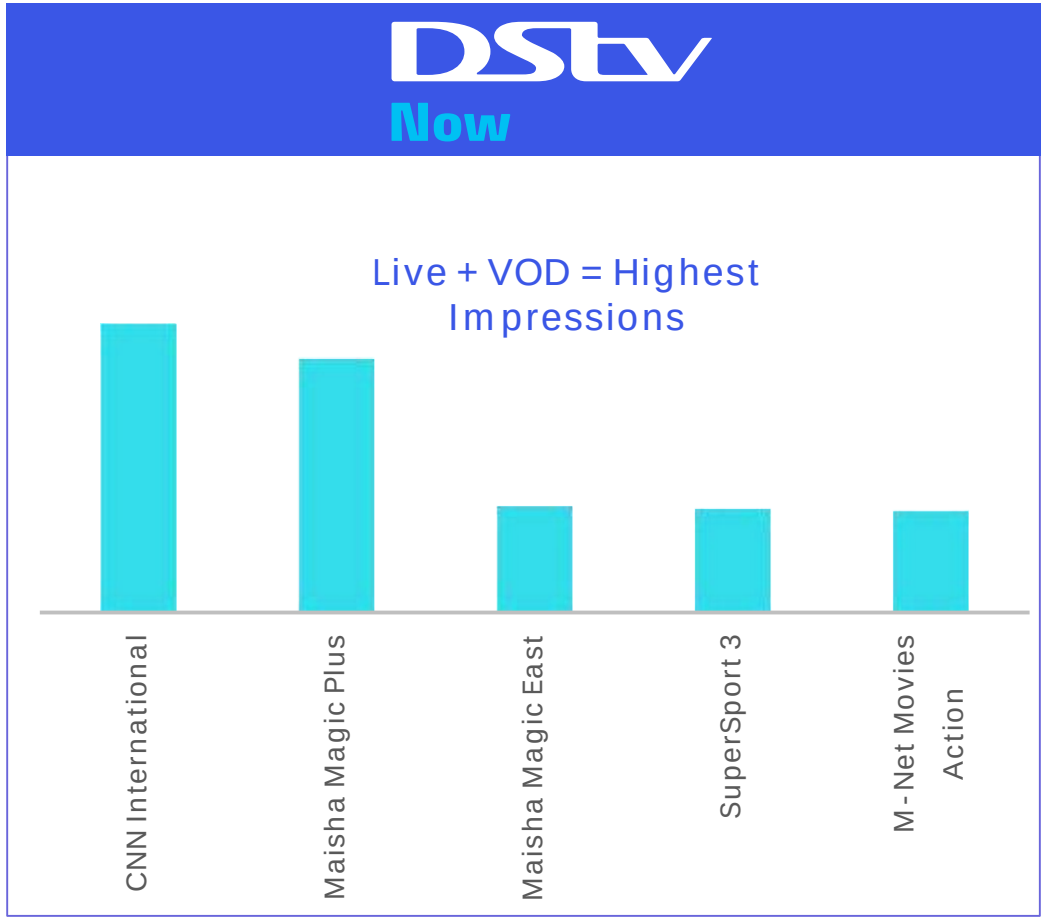
Top Channels DStv & DStv Now





Linear channel viewing on DStv set-top box that that mirrors DStv Now, illustrating available incremental reach. SuperSport 3 viewing on DStv Now mainly driven by relive matches.

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Source: Amplitude as at Apr 1-30 2020

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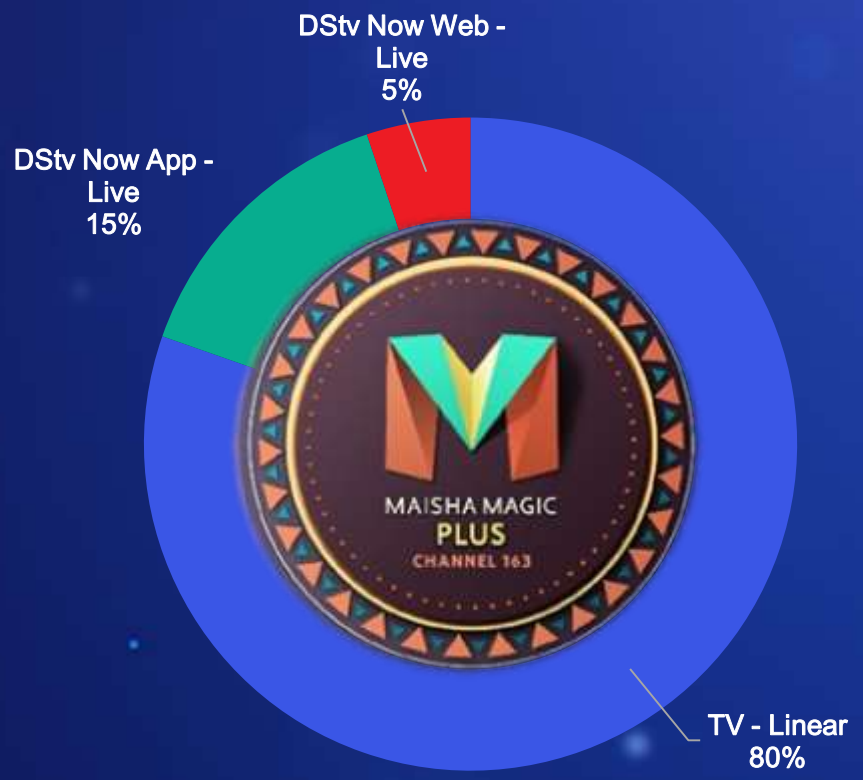
Stacking Your Video Buy



1 - 30 April 2020

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Content Highlights & New Programmes

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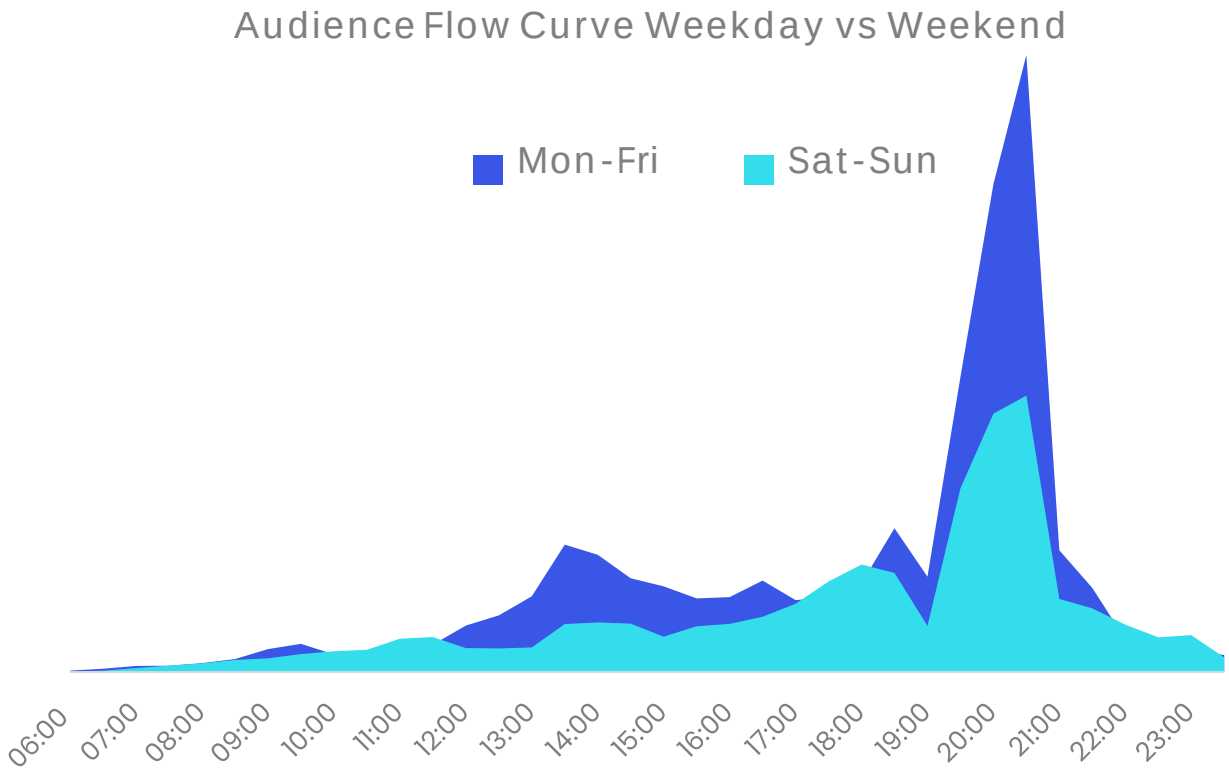
MAISHA MAGIC
PLUS

Telling Our Stories



Time Spent Viewing

Averaging 1h23mins for a single viewing session across weekday and weekend

With a growing social media audience

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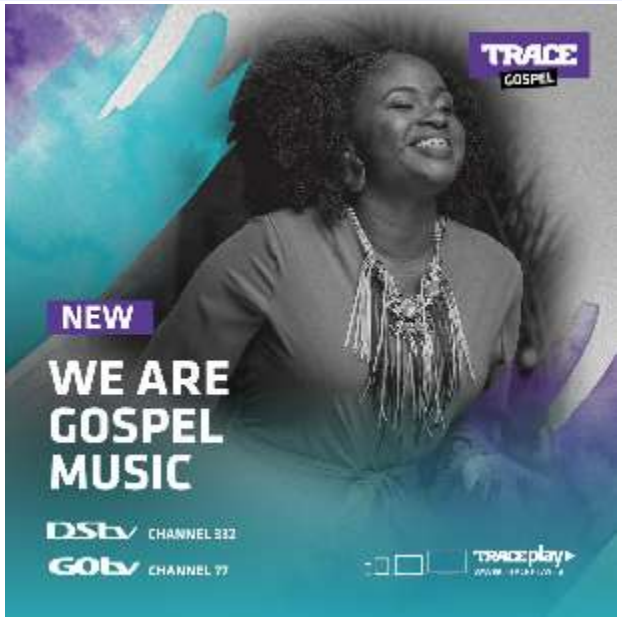
Upcoming new content

TRACE MZIKI

TRACE GOSPEL



TRACE MUZIKA

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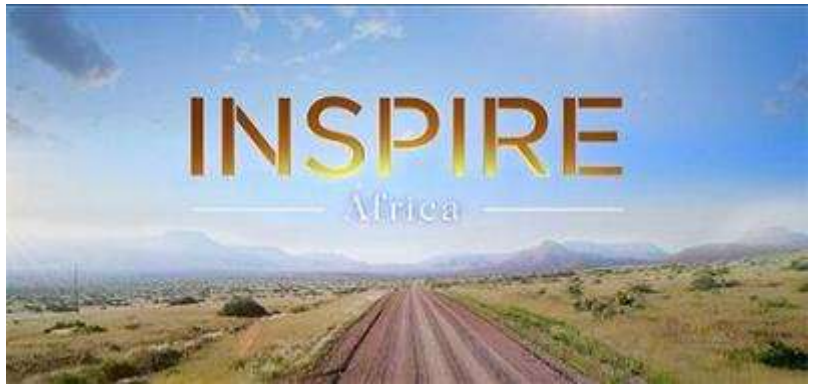
Connect With Africa

africa news.

The only Pan African multilingual news channel.

Launched on DStv, DStv Now and GOtv in March 2020, and will accept **advertising from end July 2020**.

With anchored shows, such as the daily bilingual breakfast show Morning Call, a team of **50 local correspondents**, **Africanews reports breaking news from the ground**, delivers unbiased reporting and showcases all the voices shaping the future of the continent



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In Summary

Viewership growth

Additional channels to choose from

Multiplatform – offering more choice of where to view.

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Thank You for Watching