# Consumption Patterns of Local Programmes on Pay Television in Kenya: A Case Study of Zuku Television

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**ABSTRACT**:- Liberalisation of airwaves and proliferation of broadcasting stations has led to increased competition in Kenyas' broadcast industry (Oriare et al., 2010). In pay television sector, stiff competition was witnessed with the entry of Wananchi Group having a brand name Zuku in 2009 (Kenya Film Commission 2010).This study was based on the pay television broadcast sector in Kenya and focused on Zuku as a service provider. The overall objective of the study was to establish consumption patterns towards local content on Zuku television by subscribers. Specific objectives sought to establish factors determining uptake of local Zuku content, establish subscribers' perception of local content aired by Zukuin terms of quality and story line and establish responses of service provider towards consumption patterns. The target population for this study was all Zuku subscribers in Nairobi.The study used primary data, which was collected using open-ended interviews and questionnaires meant to get views of subscribers on local content; structured interviews were conducted to get views of Key Informants. Secondary data sources were also re-visited for more information, this were earlier researches commissioned by Zuku. Data was presented by use of tables and figures.The study established that most Zuku subscribers were aware of all local programmes on its platform. It was further established that although local programmes awarenesswas high, consistency in viewership was poor.*State House* was established as the most favourite local programme on Zuku platform because of its ability to connect with the viewership in terms of movie settings, fiction and drama, while *Groove Theory* was established to have the best video quality and *Leo*to have the best audio quality.High viewership consistency was established among subscribers of 25 to 30 years. Local programmes on Zuku were established to be family oriented hence people consumed them in a familysetting. It was established that local programmes viewership was concentrated on weekends more than weekdays among Zuku subscribers. The study recommends that Zukuneeds to telecast fresh episodes of local programmes on weekends and slot repeats during weekdays.It also recommends that Zuku increase promotion of local content on its platform to increase awareness across all subscribers.

## I. INTRODUCTION TO THE STUDY

In Kenya, Digital Satellite Television (DSTV) which is a product of MultiChoiceAfrica has been the major player in the pay television market since 1995 (Kenya Film Commission 2010). However, the entry ofWananchi Group having brand name Zukuin 2009 led to a sharp rise in competition (Kenya Film Commission2010). Due to stiff competition in the market, MultiChoice Africa in 2011 launched another product called GOtv with an aim of making pay television more affordable to subscribers in Kenya (www.multichoice.co.za). Star Times which is owned by Chinese firm Star Times Media with its signal being provided by Pan African Network Group is the latest entrant in the market having been launched in July 2012(www.startimes.co.ke). Due to this competition pay television operators have started incorporating local content in their programming schedules in order to attract and retain their subscribers. According to Oriare et al., 2010(p.11), Kenyans want a media that promote development of local content and talent.According to the Kenya Communications (Broadcasting) Regulations, 2009 local content means the total of all television or radio programmes which fulfil any four of the following conditions (a) The production is made in either Kenya's native languages or official language of Kenya. (b) The production was done in Kenya. (c) The content deals with issues that are unique and relevant to Kenyan audiences. (d) At least 20% of the share of the production company is owned by Kenyans. (e) Majority of the artists are Kenyans.

## II. BACKGROUND OF THE STUDY

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

Content production has the potential to develop into a strategic industry for Kenya particularly in job creation, conservation, promotion and exportation of local culture and nurturing of local talents (Ministry of Information and Communication, 2007). Kenyas' television audience can access diverse media choices but they are heavily fragmented. Audience habits, preferences and patterns affect media behaviour. Kenyas' media consumers use radio the most, followed by television and newspaper (Oriare et al., 2010).This means that it is the audience that controls the programming content of media houses and not the broadcast media to dictate to the audience what they want to hear or watch. Therefore if a subscriber chooses pay television provider on the basis of particular sports content, those customers would be harder for competitors to tap as some sports content is sold on an exclusive basis (Communications Commission of Kenya, 2012, currently known as Communications Authority of Kenya). This underscores the fact that content is one of the major tools used by pay television stations to attract and retain their customers. The information and technology revolution has positively affected the media in Kenya. Large media houses such as Nation Media Group, Standard Group, Wananchi Group and MultiChoice are quickly adapting to new technologies. Therefore, Kenyans want a media that promote development of local content and talent (Oriare, et al., 2010).The influence of television programmes on our political, socio-cultural and economic structures, mostly depend on the level of exposure towards the broadcast content. With the rise of technological convergence, it is imperative to establish the platform where content is accessed for the desired influence to be achieved (Oriare et al., 2010).These platforms are radio, television, mobile phones and internet.

The movement of media in Kenya towards monopoly, leading to ownership concentration in few hands, has further led to homogeneity in terms of content production (Oriare et al.,2010).The duplication in terms of content production is mostly evident in free-to air stations (FTA) where you find programmes with same actors ,same themes and only the programme title has changed, airing in two different stations. For example: The programme*Pranksters* on NTV.On Citizen Television the programme called *Pasua* has the same theme as *Prankstars*, same location setting and one actor happens to appear in both shows. Another is the*XYZ* which is about the political satire in Kenya. The same programme first aired on Citizen Television, afterwards the programme moved to NTV. While there is an increase in duplication of local content by FTA stations, they have also to a larger extent promoted the local kenyan television content. Some of the notable FTA stations that have extensively promoted kenyan local productions are,(a) Citizen Television which has promoted many local

productions namely; *Tahidi High*, *Mother –In-Law*, *Papa Shirandula*,*InspectorMwala*,*Tabasamu*,*Machachari*,*Naswa*(*Naswa* is the most duplicated local content concept by kenyan local content producers),*NairobiLaw*,*Waridi*,*MakutanoJunction*,*Wedding Show* (also features among themost duplicated local production concept)*Tusker Project Fame*,*XYZ* show(www.citizentv.co.ke/schedule).(b) NTV promoted productions such as *Mali, Samantha Bridal*(Same production concept as *Wedding Show*),*Churchil Live, Churchil Raw, Noose of Gold, The Property Show*,*Guy Center, BebaBeba*,*Generation3*,*Prank Stars* (Shares same production concept as *Naswa*on Citizen) (www.ntv.nation.co.ke/schedule). (c) KTN local productions broadcasted are *Tujuane, Ajabu, Pasua*(Same production concept as *Naswa* and *Prank Stars*), *Afya Bora, Club Kiboko, Tazama, Kula Happy, Changing Times*,*Mheshimiwa, Art Scene, Lies that Bind, Kenya Kona, Mama Duka*(www.standard media.co.ke/ktnschedule). (d)KBC broadcasts local productions such as *Vitimbi*,*ViojaMahakamani*,*Hila,* and *The Classmate* (www.publicbroadcasting.net/kbc/guide).Zuku as a pay television has also incorporated kenyan local television content such as, *Groove theory, State house* and *Leo*(www.zuku.co.ke/tvguide).Kenya government over the past few years has tried to put in mechanisms that can help promote local content productions such as the establishment of Broadcasting Content Advisory Council (BCAC) which was established under section 46s of the Kenya Information and Communications Act,1998 (CAP 411A).BCAC is responsible for making decisions on administration and development of broadcasting content aspects, compliance with broadcasting codes and ethics by broadcasters and mechanisms on broadcasting complaints handling. The council is to help further promote professionalism, integrity and ethics in broadcasting sector. Secondly, the government has formulated The National Broadband Strategy which is to help to promote online local content; this will in turn make local content productions more accessible via online platform thereby increasing viewership of local content. The popularity of digital content (e-content) is meant to increase because one of the objectives of the strategy is to provide quality broadband services to all Citizens.Another milestone taken by the government is the formulation of a National Film Policy by Ministry of Information and Communication, 2011.The policy seeks to provide foundation to enable a complete and profitable turn around for the film industry and make an investment sector of choice. Taking into account recent several efforts by government to put in legislations that will help promote kenyan local content, this study therefore sought to establish consumption patterns towards local content with specific focus on Zuku as a pay television provider and specific objectives which include establishing reasons for uptake of local content by Zuku, subscribers' perception towards local content in terms of quality and story line and service provider response towards consumption patterns.

## III.    PROBLEM STATEMENT

Local content industry is an avenue that providesKenyan artists to fully exploit their talent in acting, thereby creating job opportunities more so for the youth (Ministry of Information and Communication, 2011). Large media houses such as Nation Media Group, Standard Group, Wananchi Group, Royal Media Services and Multichoice are quickly adapting to new technologies to create more platform for local content. This move clearly demonstrates that Kenyans desire a media that promote the development of local content (Oriare et al.,2010).Media in Kenya is yet to fully embrace broadcast of local content. To ensure this is achieved, Kenya government through Parliament legislated to increase local content to 60% from the current 40% in all local television stations (Hansard, 2013). While few researchers have in the recent past documented on local content (Oriare et al., 2010), such documentations have not focused on consumption patterns of local programmes on pay television in Kenya.In addition,since Zuku launched its pay television operations in 2009 ([www.zuku.co.ke](www.zuku.co.ke)), the company has not undertaken any research in regard to its local programmes such as *Groove Theory,State House* and *Leo* so as to establish consumption patterns of Zuku subscribers towards local content,establish factors determining uptake of local content,establish subscribers' perception of local content in terms of quality,storyline  and to establish response of service provider towards consumption patterns. It is this gap that the study sought to fill.

### Specific Objectives
 i)   To establish factors determining uptake of local Zuku content.
 ii)  To establish subscribers' perceptions of local content aired by Zuku in terms of quality and story line.
iii)  To establish responses of service provider towards consumption patterns.

### Research Questions
The study addressed the following research questions.
(i)   What factors determine uptake of local content by Zuku?
(ii)  What aresubscribers' perception towards local content aired by Zuku in relation to quality and story line?
(iii) What is the response of Zuku as a service provider towards consumption patterns?

## IV.    LITERATURE REVIEW AND THEORETICAL FRAMEWORK

There is a renewed interest in the power of the mass media over its audience. As media technology develops and as mass media become more pervasive in our daily lives, media influence is no longer limited to changing or reinforcing opinions, attitudes and behaviours Kevin,(2003).The mass media has become important socialization agent as well creating and shaping many of our shared attitudes, values and perceptions of social reality Alexis, (1984).In the wake of this new reality, Kenya government has shown unprecedented interest in increasing the percentage of Kenyan local productions to broadcast in media stations from 40% to 60%. (Hansard, 2013).Technological advancement in communication industry is yet to support broadcasting of more local content especially the long awaited shift from analogue to digital broadcast platform (Ministry of Information Communication, 2007). Also the faster growth being seen in the pay television industry is yet to fully promote locally produced programs.This chapter therefore critically examine theories and studies that are relevant to this research.According to Abel, (2008).The first purpose of literature review is to help the researcher conceptualize a research study by acquiring a broad based knowledge of possible topics. Secondly, it helps one to compose a critique of the materials that have been identified by the researcher as relevant.Oriare et al., 2010(38), in their research "The Media We Want" concentrated more towards media ownership trend and consolidation in Kenya. In this section, Oriare et, al., (2010), associates media political ownership with political elite class such as former President Daniel ArapMoi,his son Gideon Moiand Joshua Kulei having a link with the Standard Group, former Prime Minister RailaOdinga being associated with Radio Umoja and Nam LolweFm,while former Presidential Candidate Kenneth Matiba being associated with The People Newspaper through Kalamka Limited.

Oriare et al.,(2010)(61) notes that the popularity of local television programs like Mother in Law,Tausi,PapaShirandula and Cobra Squad indicate that Kenyans want media that would promote development of local content and talent. However, Oriare et al., (2010), doesn't indicate the uptake of these programs by Pay television sector.Oriare et al., (2010),suggests that there is only a need to undertake further research on applications and financial viability of emerging local content while there also exists a need to determine the uptake of local content more so by pay television, reasons for the uptake and its influence on subscribers'.It is this gap that this research sought to fill.

## V. USES AND GRATIFICATION THEORY

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

Uses and Gratification theory focuses attention on individuals in the mass communication process while sometimes gratification happens at group level. People use media for reinforcement of values .They always want to identify with characters that reinforce their values.McQuail (2005) notes that people use media for different reasons but perhaps the most important one is the quest for current information in the society. Example, people are always glued to their television sets during news time to catch up with the current happenings in the society hence become informed.Blumler and Katz, (1974) argued that audience needs have social and psychological origins which generate certain expectations about the mass media leading to different media exposure patterns of gratifying both intended and unintended needs. This therefore assumes an active audience making own choices.However,McQuial,(1987) argues that social and psychological status uniformly influence both general habits of media use and belief and expectations of benefits offered by media which shape specific acts of media choice and consumption.Blumler and Katz, (1974) says that peoples social and psychological origins do generate expectations and needs that are always gratified by media.

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

## VI. NEW AUDIENCE AND RECEPTION THEORY (ACTIVE AUDIENCE)

This theory focuses on how audience members generate meaning from the media in broader context of the exercise of power in society (Kevin, 2003).The uses and gratification model is interested in what audiences do with the media, however, this theory is more interested in understanding how audience actively engage in the process of generating meaning and the factors outside the media that shape the sense they make of the media messages (Kevin,2003).The theory also recognises the intelligence of media audience and their capacity to make decision on the type of content they want to watch thereby putting them in an active individual, social and political level. Structuralists argue that the content of the media is organised in particular patterns that positions audience and determine meaning people take.(Kevin,2003).Writers of the screen theory such as Stephen II Catch and Laura Mulvey analysed how films positions the audience as a subject and force them to take on the identity and ideology of the film text. Heath, (1981) argues that audience is positioned in the narrative of a film by Cinematic techniques. For example; The camera shoots from perspective of protagonist and what she /he is looking at, thereby offering the audience with illusion of the world. This encourages the viewer to be active and see camera as real and not an ideological construction. Screen theory offered an analytical means with the media. It examines structure of the film through the use of the camera angles, editing devices and other techniques (Mulvey, 1975).According to Eldridge et al.1997, film tend to construct masculine subject positions. In mainstream Hollywood women act as erotic objects for male audience (Van,1994).Mulvey says that the link between Cinematic practices and patriarchy is clear. Films reflect, reveals and even plays on straight, socially established interpretations of sexual difference. This perhaps explains the reason why there are specific roles for male and female actors in local television content.For example,Men will always play the role of watchmanin local drama '*Papa Shirandula'*.This theory fails to explore the relationship between actual audience and content, while the uses and gratification theory clearly explains this relationship in terms of personal identity, it says the relationship is created when the audience use content as a tool of Integration and social interaction and for quest of getting information. Screen theory fails to acknowledge that audience members come to media with their own views and perspectives but instead states that it is the media text that constructs ones ideological position.Mulvey's work has also been challenged for neglecting difference in sexual identity amongst audience and for emphasising gender at the expense of other differences such as race (Eldridge et al., 1997).

In re-appraising active audience theory; it states that audience are no longer passive, gullible entity, easily manipulated by media. It moved away from seeing people's interaction with media as passive. Active audience theory challenges the notion that what the media say is crucial in determining what people think. People are not simply captive subjects positioned by media texts to accept ideological dominant messages, they have the freedom and interpretive skills to resist and subvert the media. (Kevin, 2003).Fiske's as one of the active audience theory scholars is stressing on ability of audiences to make their own meanings from what the media produces.Schiller, (1989) observes that in active audience theory the impact of resistance and subversion. The active audience theory says that resisting media messages is always progressive, other critiques like Barker and Brooks, (1998) point out that audience in some situations could be said to be positively choosing to be passive.Kitzinger, (1999) identify difference between how people react or respond to media text and interpretation of the meaning of text in that others can agree on the meaning but refuse to accept what is conveyed, hence while some people use the media as a source of personal identity, others may reject this notion. For example; some audience will find Kenyan local television content appealing while others will not. Kitzinger(1999),therefore disagrees with Blumler and Katz (1997) theory that media use tend to be more specific among audience.Morley, (1986) says that decision to watch particular program or format were not simply based on pleasure people gained from them or their resonance with the ideological approach. Instead they were as a result of family circumstances and power relations in homes. The different roles men and women have in domestic sphere shape their viewing habits. For example; Women will watch some programs because their husbands watch and the same applies to men. This is based on who has the power over remote.

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

## VII. RESEARCH METHODOLOGY

This study used a qualitative approach and interviewing and document analysis as some of tools of data collection.This study targetedZuku subscribers in Nairobi, Kenya.There are 50,000 Zuku subscribers on Cable platform in Nairobi and 70,000 Zuku subscribers on Satellite platform in Nairobi (Zuku, 2014).This means that the targeted population in this research was 120,000.This was also the accessible population for the purpose of the study.Convenient or accidental sampling was used.Abel (2008) refers to this as availability sampling. Convenient sampling easedaccessibility of the target population since any subscriber who came to pay his/her monthly subscription fee formed part of the study sample despite race, gender, age,educational background and economic status. This led to collection of varied opinions fromrespondents.A sample of 50Zukusubscribers in Nairobi**(see Table 1)**was obtained and subjected to structures and non-structured interviews.The interviewing took a period of 10 days where each day five (5) subscribers who had come to pay for their monthly subscription were interviewed.

**Table 1: Sample Size**

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

The tools that were used include; Open-ended interviews to get views of Zuku subscribers on local content i.e. *Groove theory*, *Leo* and *State House*.An audio recorder was used so as to capture all the verbal explanations. Structured interviews with key informants such as Zuku head of programming and marketing representative was done.Use of open-ended interview allowedthe researchers to ask follow up questions that helped to extract more information from subscribers.According to Holstein and Gubrium, 1997, open ended interviews allow respondents to play an active part in the research, rather than being passive objects to be studied.Stake(1995) observes that "gathering data by studying documents follows the same line of thinking as observing or interviewing". Data from earlier commissioned researches by Zuku were studied and acted as secondary sources.

## VIII.    DATA ANALYSIS AND INTERPRETATION

Data from the filed were analysed based on predetermined themes and objectives. It was presented in tables, figures and narrative form depending on type of data (quantitative or qualitative).

### Subscription Platform

The respondents were requested to state their subscription platform. The results are presented in figure 1 below.

**Fig: 1**
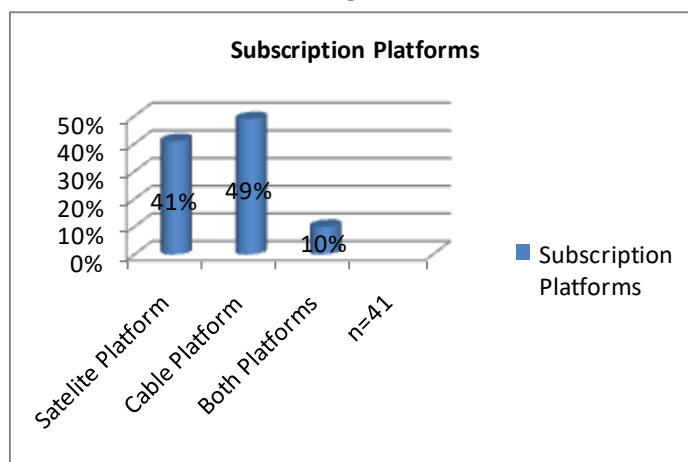


According to the findings 41% of the respondents indicated that they were on satellite platform, 49% were on cable platform and 10% were both on cable and satellite platform. From the findings most of the respondents were on cable platform, which further indicatesfaster spread of Zuku fibre coverage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

## IX.    PROGRAMMES CONSUMPTION PATTERN

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

## X.    AWARENESS OF LOCAL PROGRAMMES ON ZUKU

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

**Fig: 2**
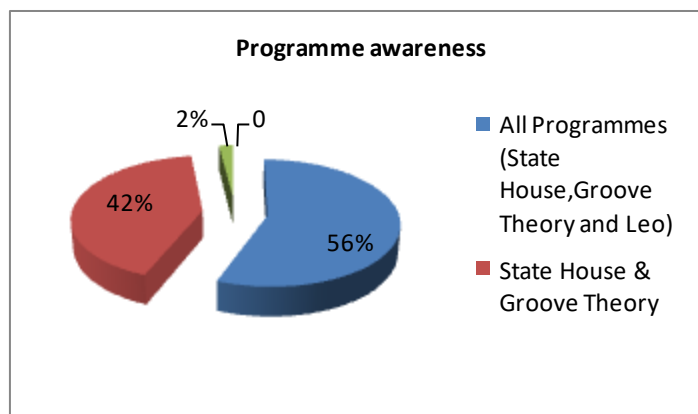
As indicated in figure 4.5 above,56% of the respondents reported that they were aware of local programmes on Zuku television (*State House, Groove Theory andLeo*), 42% of the respondents indicated that they were aware of only two programmes namely *State House* and *Groove Theory* while 2% of the respondents indicated that they were not aware of any of the mentioned local programmes on Zuku and instead indicated that they were aware of*Crime Lab* and *Nat Geo Gold* which are international content. Subscribers who indicated awareness of all programmes were mostly between 24 years and below,25 and 30 years, 31 and 34 years. Respondents who indicated awareness of only two programmes (*State House and Groove Theory*) were mostly between the age of 35 and 40 years. Subscribers between 41 and 44 years indicated awareness of international content and not local content. The study did not manage to capture views of subscribers between the age of 45 and 50 years,51 years and above respectively. This is because a good number of customers within the ages did not come to pay for their monthly subscription at Zuku head office hence; they might have paid through other channels or sent others to make payments on their behalf. From the findings the study infer that most subscribers were aware of local content on Zuku channel hence, it is expected that more customers should be watching local programmes on a regular basis however, most respondents when asked whether they had watched any of the programmes in 7 or 4 weeks, most people responded to have watched local programmes in the last four weeks and not 7 days as it would be, based on awareness level. From the findings we deduce that although there was high level of awareness of the local programmes, viewership of the programmes was not consistent among the subscribers. The study also found out that some subscribers (42%) were not able to recall *Leo* among the local content. In addition, there were some subscribers (2%) who were totally not aware of any locally content on Zuku. The study therefore deduce that Zuku needs to intensify awareness of local content on its platform through various channels of communication.

## XI.      FAVOURITE PROGRAMME FOR AUDIENCEES
The respondents were asked to indicate their favourite programmes and results shown in fig 3 below.
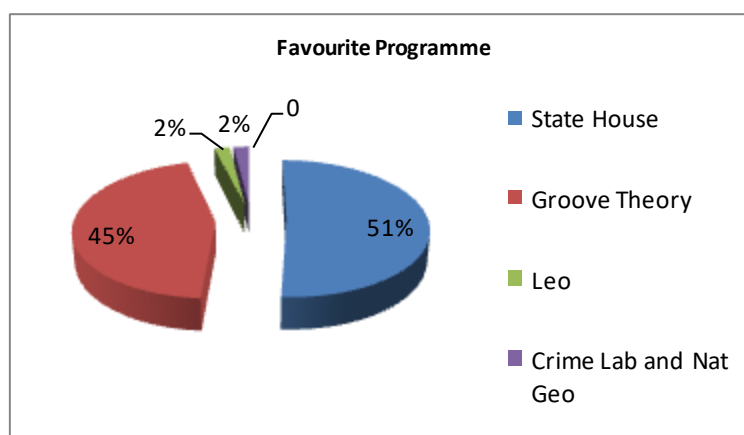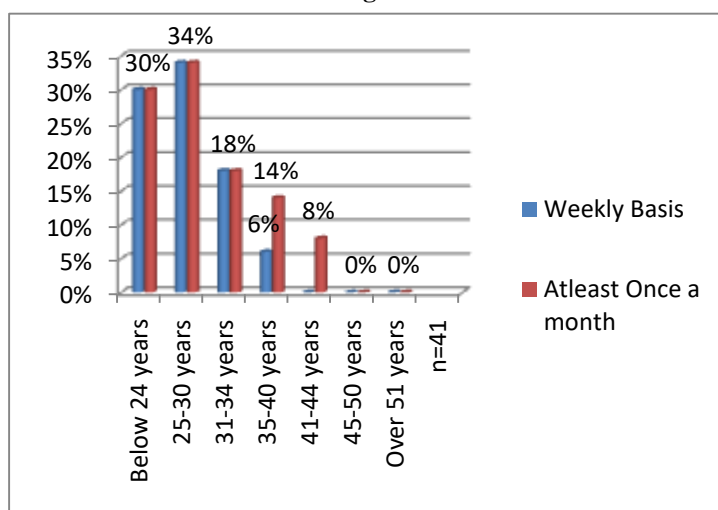


According to the findings, 51% of the respondents indicated *State House* as their favourite programme, 45% mentioned *Groove Theory*, 2% indicated *Leo* as the favourite programme while 2% mentioned *Crime Lab* and *Nat Geo* as their favourite programmes. From these findings the study deduce that most of the respondents indicated *State House* as their favourite programme hence the most watched local content on Zuku platform, this is because of unique concept (the first show to highlight what goes inside the most powerful political office on land),which they could easily relate to. In addition, by having 2% of the respondents indicating that they are attracted to international content because of very high standard of production and unique stories,Zuku needs to engage more with local production companies to give further guidance on coming up with high quality productions and unique scripting of the stories. Key informants indicated that they engage with local production firms by acquiring ready content and organising local content forums for producers. Such forums should now involve intensive training towards quality programmes production and scripting. This will help to capture the remaining 2% of subscribers who still feel that local continent doesn't have captivativating stories and not up to international quality standard.

## XII.      PROGRAMME VIEWERSHIP TREND BY AGE
The respondents were asked how often they watch local programmes ranging from weekly basis to ones a month. The results are shown in the figure below.

**Fig 4**



According to the findings, 30% of respondents below 24 years watch local content on weekly and monthly basis which indicates a consistency in their viewership. This consistency was attributed to having enough time to reach home early enough and finish any pending homework hence, get enough time to watch these programmes, 34% of respondents between the age of 25 and 30 years watch on weekly and monthly basis. This group reported the highest programmes viewership level hence become the target group that has a keen following on local programmes.18% of respondents between 31 and 34 watch on weekly and monthly basis. While awareness of the programmes is high among this group low viewership was recorded due to lack of time for programmes which telecast during weekdays however consistency was indicated towards weekly and monthly viewership. 6% of respondents between 35 and 40 years watch on monthly basis while 14% of them watch at least once a month. This group recorded inconsistency towards weekly and monthly viewership; this was attributed to lack of time for programmes that telecast during weekdays. 8% of respondents between 41 and 44 years watch at least once a month with none watching on a weekly basis. The weekly basis turnout was attributed to the issue of lack of time.The study was not able to capture respondents between the age of 45 and 50 years, 51 years and above.This we deduce that subscribers between these ages had likelihood to have sent others to pay for their monthly subscription fee, hence could not be located among those who came to pay through cash.

## XIII.        SETTING OF PROGRAMME VIEWERSHIP

Respondents were requested to indicate setting/environment in which they watch local content. Figure 6 below shows the outcome.

**Fig: 6**
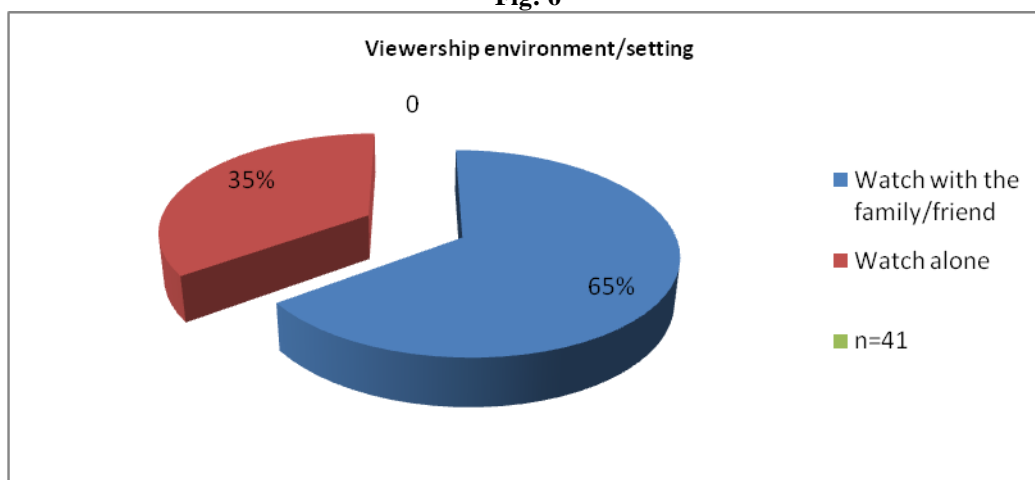


According to the findings, 65% of the respondents indicated that they watch the programmes with the family/friend. This infer that local content identify with the family values and represents the socio-political intrigues that one can easily relate with. The set up of the scenes brings familiarity to the viewer. This mostly

occurred with weekend telecast where people watch at comfort and not in a hurry for next day activities. Also 35% of the respondents indicated that they watch the programmes alone. From this we deduce that those programmes that telecast on weekdays are likely to get lean viewership since people will watch the programmes while doing other activities as they prepare for next day work.

## XIV.        PROGRAMME TIME SLOTS

Respondents were requested to indicate if they were comfortable with the current programmes telecast time which are Wednesday 8:30pm for Groove Theory, Monday 8:30 pm for State House  andSaturday 9:30 pm for Leo or if they would prefer another broadcast day. The results are presented in figure 7 below.

**Fig: 7**
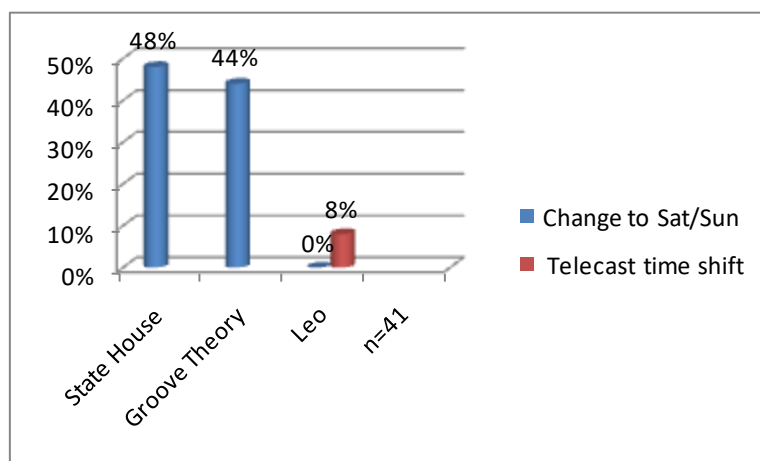


According to the findings 48% of the respondents indicated that they would like telecast day for *State House*to change to Saturday or Sunday, 44% of the respondents indicated that they would like telecast day for *Grove Theory* to change to Saturday or Sunday while 8% of the respondents indicated that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

**Programmes video quality**
The respondents were requested to rate the video quality of local programmes. The results are presented in the figure 5.0 below.

**Fig:8**
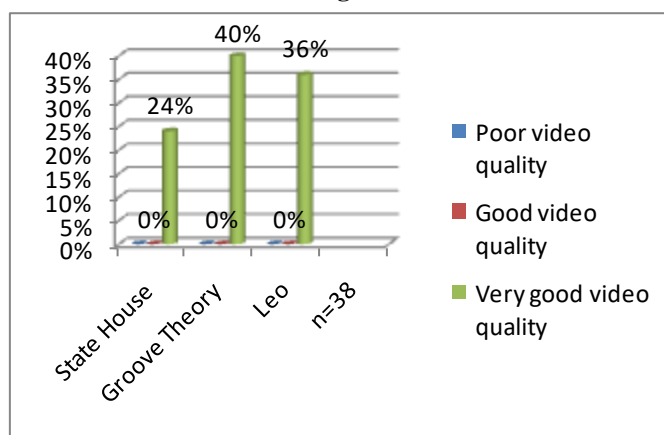


From the findings, 24% of the respondents indicated that*State House* had very good video quality, 40% indicated that*Groove Theory*very good video quality while 36% indicated that*Leo* had very good video quality. From the findings we deduce that small percentage of respondents endorsed *State House*as having very good

video quality despite being the most favourite local programme on Zuku platform however, this ratings were from a lay mans point of view since subscribers were not video experts but acted upon the impression that they got while watching these programmes which can be influenced by many factors such as the type of television set one had at home. No programme was reported to have poor video quality thereby inferring that most subscribers are happy with the video quality of local content that is aired on Zuku platform.

**Relation of programmes story line with local context/environment**
The respondents were further asked to indicate whether the story line of the local programmes relate very well with their local context.The results are shown in figure 9 below.

**Fig: 5.2**
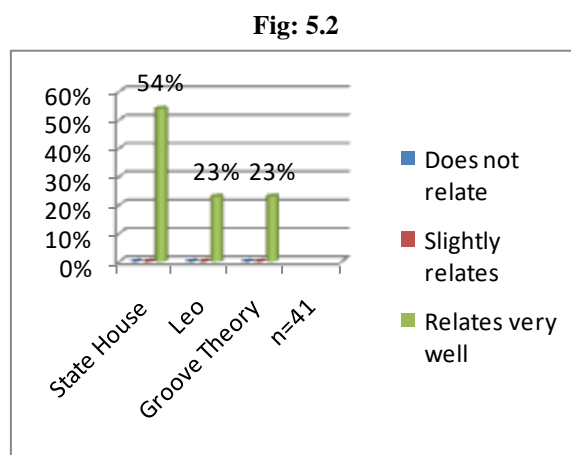


From the findings, 54% of the respondents indicated that the story line of State House relates very well with their local context and it is a programme they can easily identify with. We deduce that popularity of *State House* among subscribers was attributed to its story line that subscribers could easily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

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

**Ways through which Zuku responds to viewer demand on local content and consumption patterns**
This study sought to find out Zuku response towards viewer demand on local content and consumption pattern of local programmes on its platform. From the findings, Zuku respond to viewer demand of local content by incorporating more local content for the audience on the platform. Zuku does this by increasing budget for local productions so as to buy more already produced programmes and commission other local productions hence curb the existing and growing needs.Towards the consumption patterns, Zuku re-schedule the On-Air time slot for the favourite local programmes based on subscriber preference. It also respond to the pattern by introducing re-run (repeats) of the programmes so as to serve subscribers who might have missed an episode of a favourite local programme. In addition, Zuku has launched an On-Air promo material that educates its subscribers on how to use the personal video recorder function in their set top boxes so as to record any programme that might be airing when one is away.Key informants further indicated that they respond to

consumption patterns by ensuring a dependable and error free electronic programme guide that can help one to know in 5 days time the programme he/she will be watching at a particular time. However, some respondents raised concern on dependability of electronic programme guide displayed by set top boxes as some subscribers noted certain instance of conflict of information between set top box display and On-Air programme.

## XV. SUMMARY OF FINDINGS, CONCLUSIONS AND RECOMMENDATIONS
### 5.1 Summary of the findings
This study sought to establish consumption patterns of local programmes on pay television in Kenya. This study established that most Zuku subscribers were aware of all local programmes on its platform. The awareness rate was at 56%. Respondents who indicated awareness of all local programmes were mostly below the age of 24 years, 25 to 30 years and 31 to 34 years. Although the level of awareness of local programmes was high, consistency in viewership was poor since most of the respondents recorded to have watched any of the programmes in the last 4 weeks and not 7 days (weekly) as it ought to be. Only 34% of the respondents noted to have watched a programme on a weekly basis.Despite high level of awareness of local programmes, 42% of the respondents could not recall Leo among the local programmes. Also, 2% of respondents hardly recalled any local programme on Zuku platform.State House emerged the most favourite local programme on Zuku platform with 52% of the respondents showing interest. This was mostly attributed by the ability of the programme to connect with viewership in terms of movie settings, fiction and drama. 2% of the respondents were not interested in any local content and instead noted international content namely Nat Geo and Crime Lab as their favourite programmes. It was also established that respondents between the age of 25 and 30 years showed consistency in programmes viewership. This group also were the highest local programme viewers on Zuku platform.It was also established that most respondents watch local programmes in the company of friends or family members hence most local programmes were found to be family oriented. 65% of the respondents watched the programmes with their family members/friends.Moreover, it was established that subscribers' preferred local programmes to be slotted on weekends rather than weekdays and only the repeats to take place during weekdays, hence high viewership was found to be concentrated during weekends than weekdays.
Subscribers' noted to be happy with video quality of local programmes with Groove Theory being noted as the programme with the best video quality by 40% of the respondents. No local programme was noted to have poor video quality. On audio quality, local programmes were established to have very good audio quality with Leo having the best audio quality. No programme was noted to have poor audio quality.It was established that local programmes on Zuku platform have story line and are acted in context that connect with the viewership in terms of movie setting, fiction and drama. State House was established as the best local content with story line and acted in a context that relate well with the audience. 54% of the respondents were established to like State House because of this connection. No local programme was established to have adisconnect in its story line.

## XVI. SUBSCRIBERS' PERCEPTION OF LOCAL CONTENT
The study also sought to establish subscribers' perception of local content aired by Zukuin terms of quality and story line. This study established that subscribers were positive towards the audio and video quality of local programmes aired by Zuku. They were rated as having very good audio and video quality. The ratings were at 40% for video and 41% for audio respectively. It was also established that the story line of local programmes had the ability to connect with the viewership. Positive feedbacks were noted from the subscribers concerning the quality and story line of the content. This was attributed to the service provider strategy towards content quality such as producing and commissioning its own content hence setting the pace for production standards in the industry and organising forums to improve the production standards in the industry.
 It was established that *State House* was rated as the best local content with a story line that connected well with the viewers which was at 54%. *Groove Theory* was established as the best local content with in terms of video quality at 40% while *Leo* was established as the best local programme in terms of audio quality at 41%.

## XVII. FACTORS DETERMINING UPTAKE OF LOCAL CONTENT
The study sought to establish factors that determine uptake of local content by Zuku. It was established that Zuku incorporate more local content on its platform based on the needs of the audience in each territory.Zuku serves different audience in various regions that has a preferred language such as the Swahili speaking audience where Zuku will acquire movies or programmes in Kiswahili so as to resonate better with the subscribers.It was established that consumption trends and behaviours of subscribers guide Zukutowards acquisition of local content. Through market research, feedback from social media platforms such as Facebook, Twitter, hits on ZukuYouTube channel and from customer care team,Zuku is able to identify genre of local content which tend to attract more viewership hence invest in buying or commissioning such genre to be produced by local production firms.

## XVIII.        RESPONSE OF SERVICE PROVIDER TOWARDS CONSUMPTION PATTERNS

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

## XIX.        CONCLUSION

This study concludes that there is high awareness regarding local content that is on Zuku platform. In addition, most subscribers felt that the programmes have very good video and audio quality while their story line also relates to the local context which was also a reason why subscribers were interested in the programmes. In addition, it was established that there is consistency in local programmes viewership among people between 25 and 30 years of age and little or no consistency of viewership among Zuku subscribers between the age of 35 to 40 years and 41 to 44 years.It was also noted that 2% of Zuku subscribers are not aware of any local content on Zuku platform but instead aware of internationalcontent on Zuku platform.It was also noted that local programmes on Zuku platform are family oriented hence reason why most respondents were watching the programmes in company of family members.It was further established that local programmes viewership on Zuku is concentrated on weekends and not weekdays. There was a preference for programme repeats to be slotted on weekdays however fresh episodes to be moved to weekend slots.The study concludes that incorporation and commissioning of more local programmes by Zuku shows that indeed consumption of local programmes have increased and the consumption pattern is guided by the ability of the programmes to connect with the viewer.

## XX.        RECOMMENDATIONS

From the findings, more Zuku subscribers prefer to watch local content on Zuku platform during weekends than weekdays. Therefore, the study recommends that Zuku needs to shift telecast of its local programmes during weekends so as to increase consumption of the programmes among subscribers**.**From the findings, television viewership is more concentrated during prime time (7:00pm to 10:00pm). To fully capture audience within this segment, the study recommends that Zuku needs to establish a block programming scheduling strategy within this hour on its local content.This study also established that 2% of Zuku subscribers are still not aware of local programmes on its platform. To help capture this group of people, Zuku should increase promotion of local content on its platform and other external channels such as billboards, radio stations and television stations.It was also established that International content is still superior to most local content in terms of quality. To help beat this competition, Zuku needs to set its local content production standards to match that of international production companies so as to entice more of its subscribers to watch local content.From the findings, it was also established that third party channels that telecast international content during prime time acts as an influence towards shift in channel viewership during such hours. For Zuku to be able retain high local content viewership during prime, the study recommends for a counter programming strategy in order to beat the competition.

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