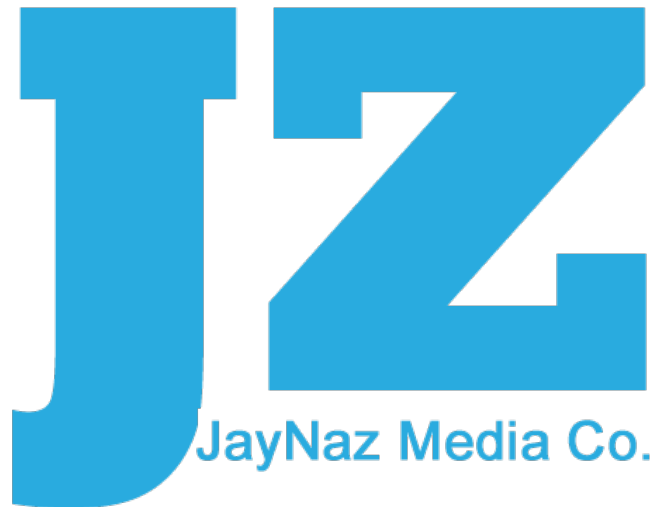




creative media advertising
JAYNAZ MEDIA COMPANY

Transit Screen Ad | Seat Back Ad | Bus Side & Back Ad

What are we here to share?



JAYNAZ MEDIA COMPANY

Transport and commuter habits

Profiles of commuter audiences

**Perceptions of advertisements
on buses**

Transit Media Case studies

Methodology

**Start: 23rd
September 2013**



**End: 30th October
2013**



Bus Commuters

- Sample: 385; Sample achieved: 426
- Mode of data collection: Face-to-face interviews on key buses
- Buses: KBS, Metrotrans, Tripple S Sacco, Zuka, Easy Coach



General Public

- Sample: 300; Sample achieved: 328
- Mode of data collection: Computer-Aided Telephonic Interviews



Advertising Agency / Advertiser

- Sample: 5
- Mode of data collection: Qualitative in-depth interviews

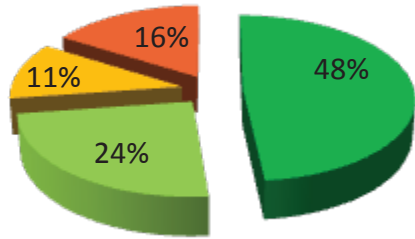


Profile of General Public

General Public

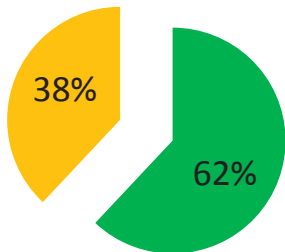
COUNTY

■ Nairobi ■ Kiambu
■ Kajiado ■ Machakos



GENDER

■ Male ■ Female

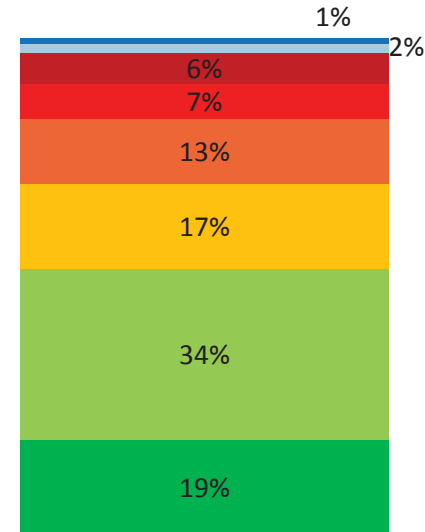


Base:

All Respondents (328)

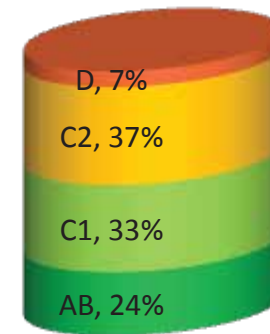
AGE

■ 18 to 24 years old ■ 25 to 30 years old ■ 31 to 35 years old ■ 36 to 40 years old
■ 41 to 45 years old ■ 46 to 50 years old ■ 51 to 60 years old ■ 60 years +



■ AB ■ C1 ■ C2 ■ D

LSM



Profiles

LSM 8-11 C1

LSM 12+ AB

Permanently employed or own a business.

A majority have diplomas, and bachelor/ post graduate degrees.

The LSM 12 household contains all the major durables and white goods, including microwave ovens. They also have domestic servants.

They are exposed to the internet, e-mail, pay TV, have fixed telephones and cell phones.

They have at least two vehicles in their households and can afford 3 meals in a day.

Their houses typically have running tap water as well as inside flush toilets. Most of them have electricity and/or solar power.

They have domestic servants.

Much of their income is from permanent/full-time employment. Members of this group have diplomas/ degrees with a few having post-graduate degrees.

Almost all have access to radio; television and print media, while a significant number have access to the internet, e-mail and pay TV. Some have personal computers at home.

They typically have fixed telephones as well as cell phones. In this group we see private car usage although some may use public transport. These households can afford 3 meals in a day.

Profiles

LSM 5-7 C2

They are mainly literate with the highest level of education achieved being middle secondary school or a diploma. .

. Some members of this group have an electric stove and a deep freezer, although a majority use gas stoves for cooking. Some of these households have domestic servants.

This group consumes TV, radio and print. Not all of these households have fixed lines and some but not all of the members of these households have cell phones. A majority in this group use public transport.

LSM 3-4 D

The highest level of education being part of secondary school

Electricity is considered a luxury in this group and cooking is done on small gas or paraffin stoves. It is rare to find flush toilets within this group as a majority have a communal pit-latrine toilet outside their houses.

Their jobs/ businesses provide them with irregular incomes in the form of cash. These incomes are often supplemented by family and friends in bigger towns and cities.

Members of this group may read a newspaper once in a month, their main media is Radio. A majority in this group use public transport or ride bicycles. Members of this group can afford at most 2 meals in a day.

LSM 1-2 E

This segment includes individuals who are in the lowest social class. Formal education is rare among this group.

They are not eloquent in the Kenyan business languages as their respective vernacular languages are the main language of communication.

It is rare to find electricity in these households and they do not have running water inside their houses. They mostly fetch water in communal taps or in a well or river. They also use communal pit-latrines normally found outside their homes. Their cooking is done using paraffin or kerosene stoves and or firewood/charcoal.

This group has no access to TV and they rarely read Newspapers (may read a newspaper once in 3 months). Their main media vehicle is Radio which they listen to daily.

This group has very little income and they mainly survive on money hand outs from family members from better financial positions living in cities/ towns. A majority in this group use public transport or ride bicycles. Members of this group can afford 1 to 2 meals in a day.



General Public

Highest Level of Education Reached

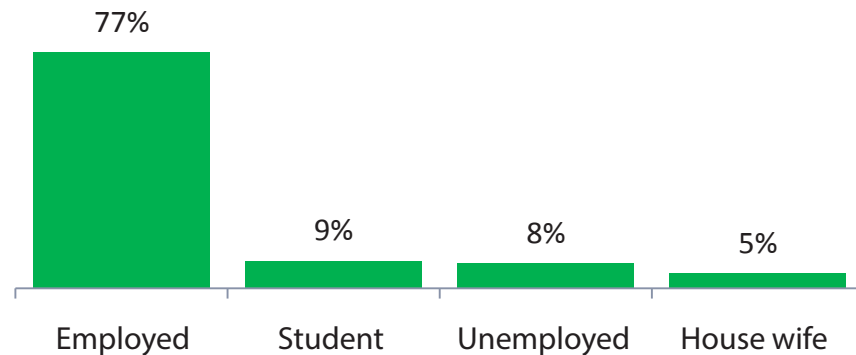
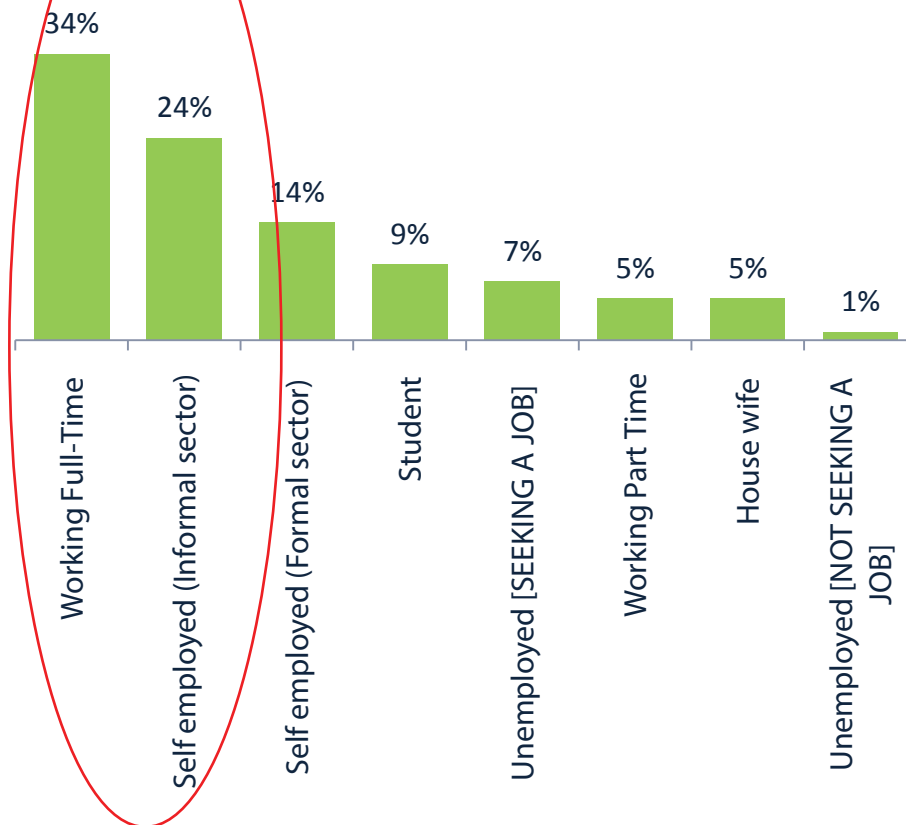
Proportion

No formal education (can read)	1%
Primary school not completed	5%
Primary school complete	8%
Some secondary school	8%
Secondary school completed	25%
Some senior high school	2%
Senior high school complete	2%
Some secondary vocational school	3%
Secondary vocational school completed	2%
Some diploma	4%
Diploma completed	21%
Some college/ university but not completed	10%
Complete university degree	8%
Post-graduate university degree	2%

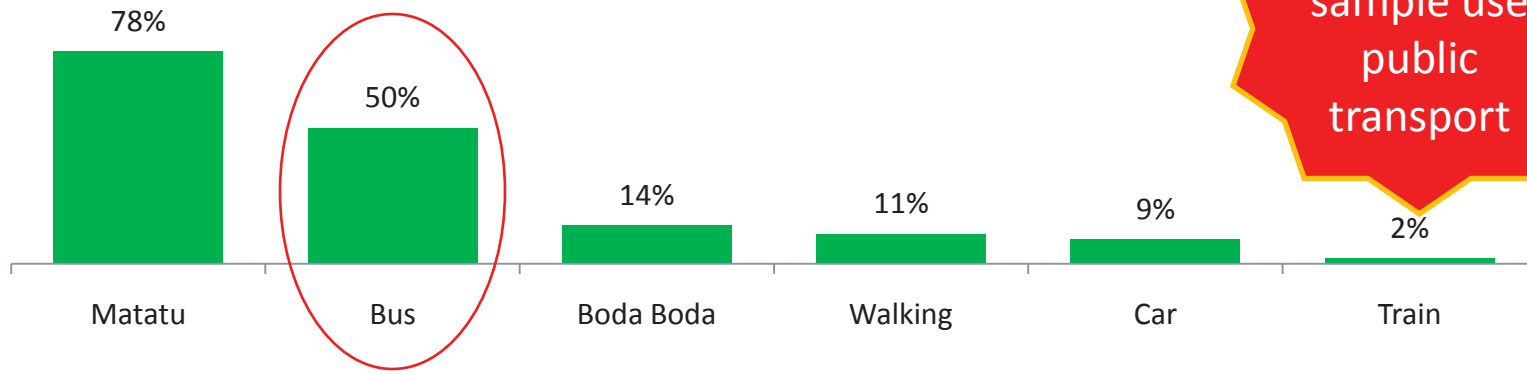
Base:

All Respondents (328)

Work Status



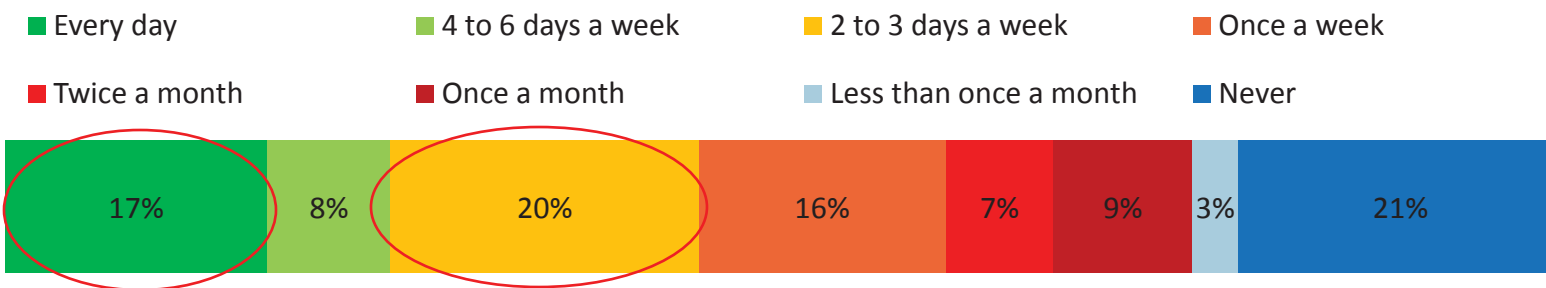
Transport Habits of the General Public



95% of the sample use public transport

Matatus are used by almost 4 out of 5 persons in Nairobi, Kajiado, Thika and Machakos districts. This is followed by buses, where 50% claim to use it as a main mode of transport.

Base: All Respondents (328)
Q1a: What are your main modes of transport?



A closer look at the frequency of bus usage reveals 17% who use it everyday. 20% of the target population use buses 2-3 days a week.

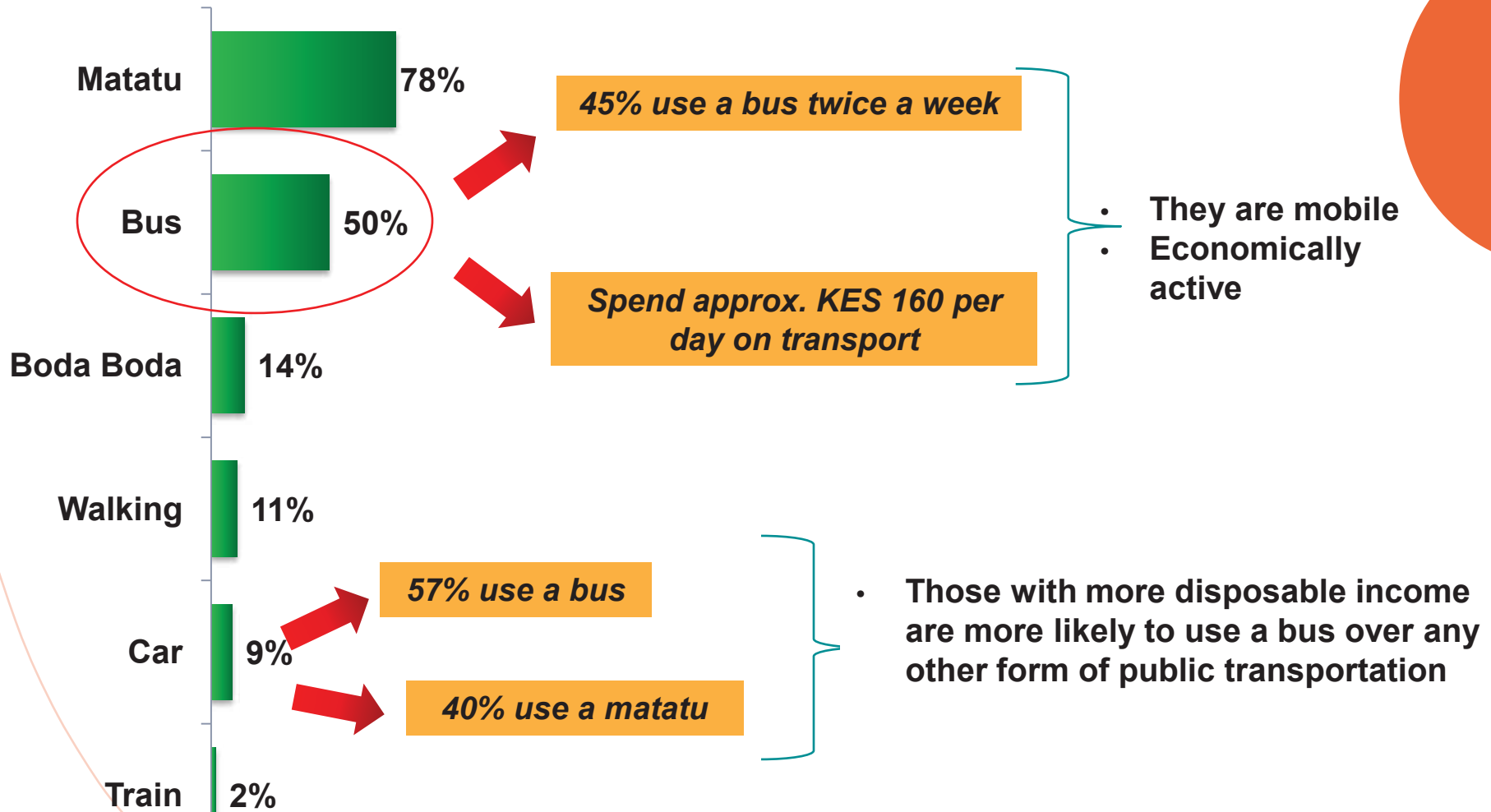
Base: All Respondents (328)
Q1b: How often do you use buses?

Economically Active Consumer Group; Regular Commuter

95% of the sample use public transport

- **79% = Secondary School Education or Higher**
- **77% = Employed**

• Can read advertisement communication

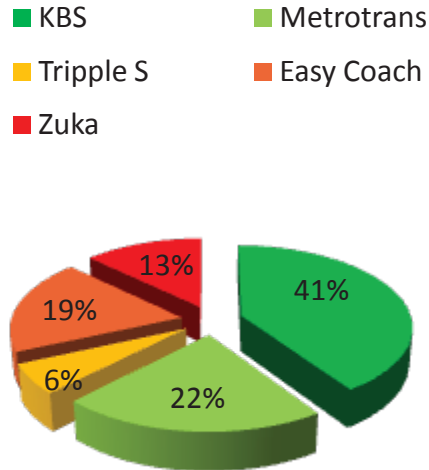




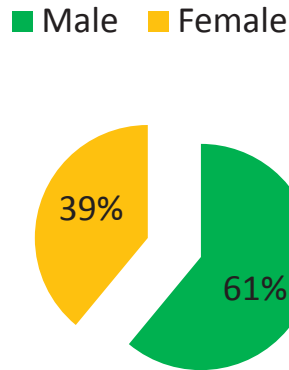
Profile of Bus Commuters

Commuters

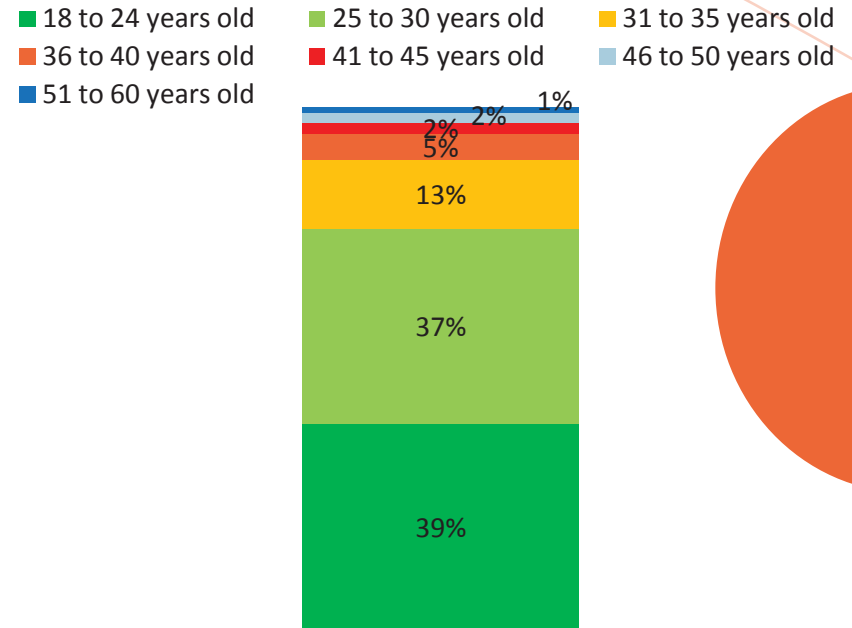
BUS



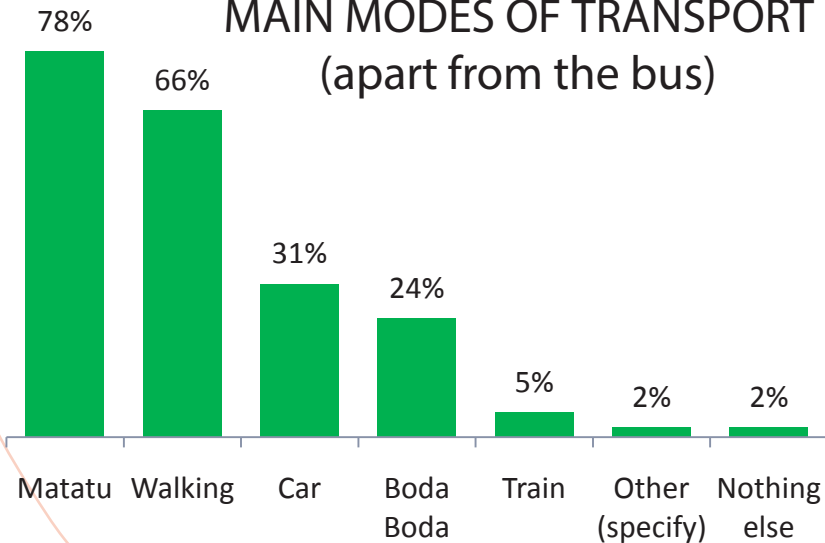
GENDER



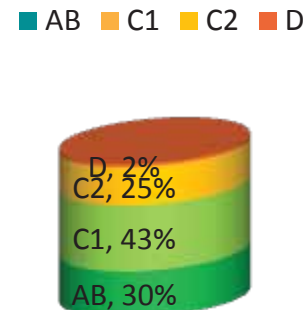
AGE



MAIN MODES OF TRANSPORT (apart from the bus)



LSM





Commuters

Highest Level of Education Reached	Proportion
Primary school not completed	1%
Primary school complete	1%
Some secondary school	5%
Secondary school completed	9%
Some senior high school	1%
Senior high school complete	1%
Some secondary vocational school	3%
Secondary vocational school completed	7%
Some diploma	6%
Diploma completed	18%
Some college/ university but not completed	24%
Complete university degree	17%
Post-graduate university degree	6%
NR/Refused	1%

Base:

All Respondents (426)

Work Status



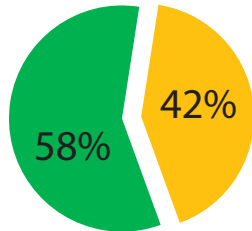
The background is a solid green color. There are three white circles of different sizes. One large circle on the left contains the text. A medium circle is on the right. A small circle is at the bottom left. Thin white lines connect the circles, forming a network.

DETAILED COMMUTER PROFILES BY BUS COMPANIES

CityShuttle Bus Commuter

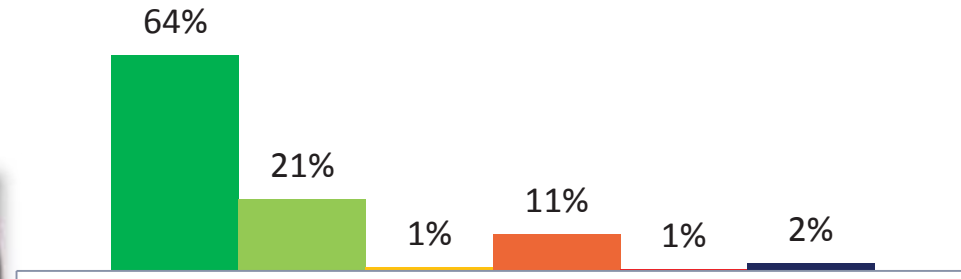
GENDER

Male Female

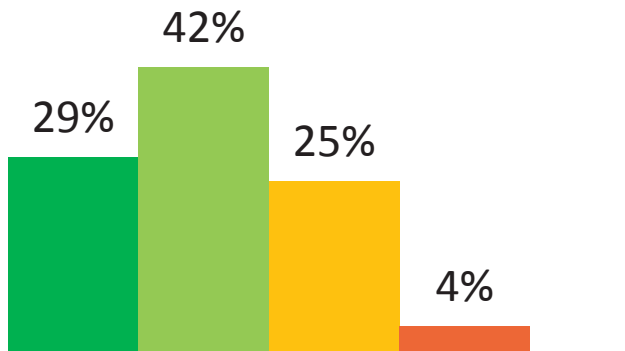


Employed Student
Retired - scholars, pensioners Unemployed
House wife NR/Refused

WORKING STATUS



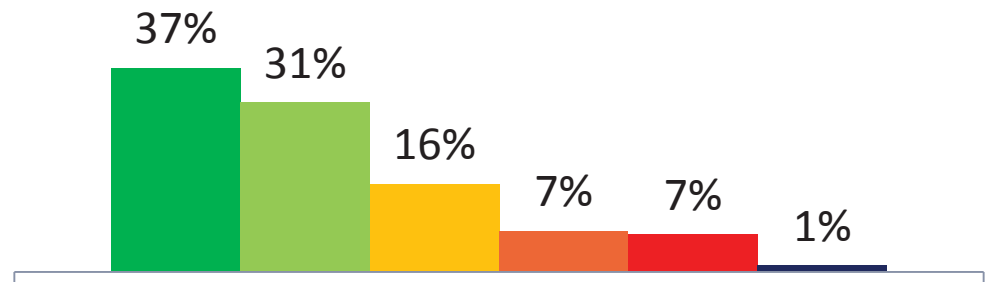
AB C1 C2 D



LSM

Base: 174

18 to 24 years old 25 to 30 years old 31 to 35 years old
36 to 40 years old 41 to 50 years old 51 years +

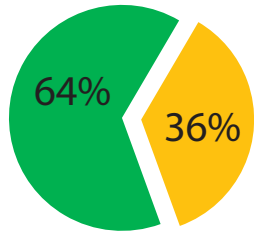


AGE

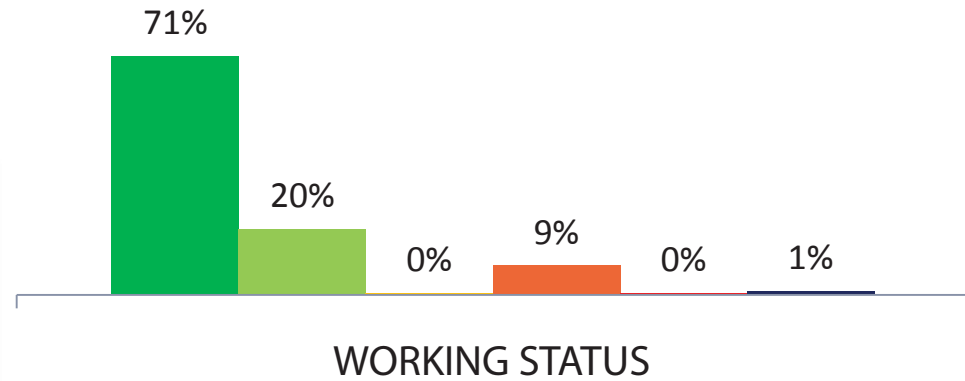
Metro Trans Bus Commuter

GENDER

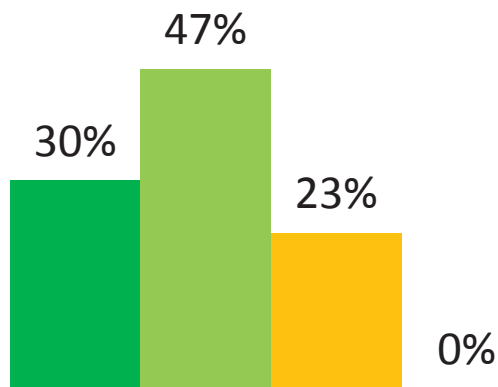
Male Female



Employed Student
Retired - scholars, pensioners Unemployed
House wife NR/Refused

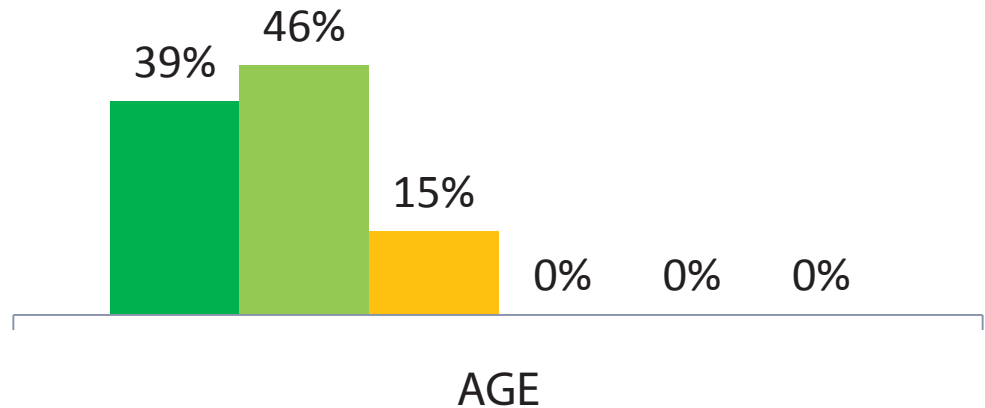


AB C1 C2 D



Base: 92 LSM

18 to 24 years old 25 to 30 years old
31 to 35 years old 36 to 40 years old



Conclusion: Differences between Bus Commuters & General Public

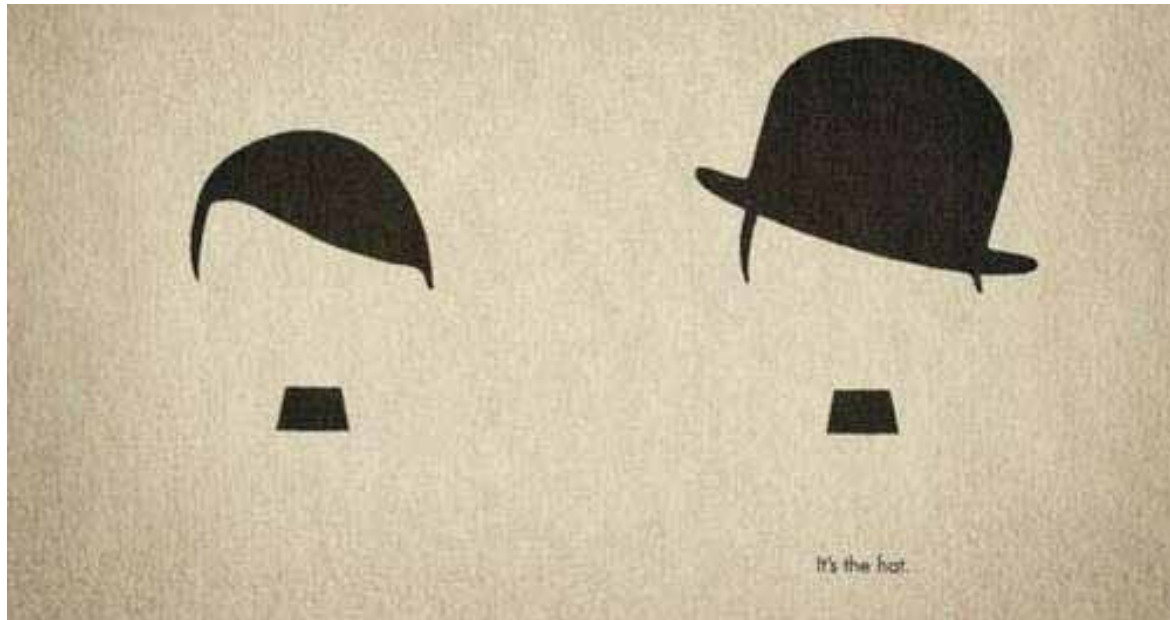
- **Age: 89% are 18-35 years in buses vs 70% general public**
- **Student Status: 22% students in buses vs 9% general public**
- **Education: 65% completed diploma & above vs. 41% general public**



Conclusion: Differences between Bus Commuters & General Public

LSM:

- **AB 30% vs 24%**
 - **C1 43% vs 33%**
 - **C2 25% vs 37%**
 - **D 2% vs 7%**
-
- **Total ABC1 = 73% in buses vs 57% general public**



CONCLUSION: The Average Bus Commuter is.....

- A younger
- more educated
- with greater purchasing power (LSM based)
- and future high potential earning ability

...compared to the average general public

- THE COMMUTER OF TODAY IS A LOYAL CONSUMER OF THE FUTURE.
- THIS IS THE BEST TIME TO FOR THEM TO EXPERIENCE, BUY, LIKE & BE LOYAL TO YOUR BRANDS

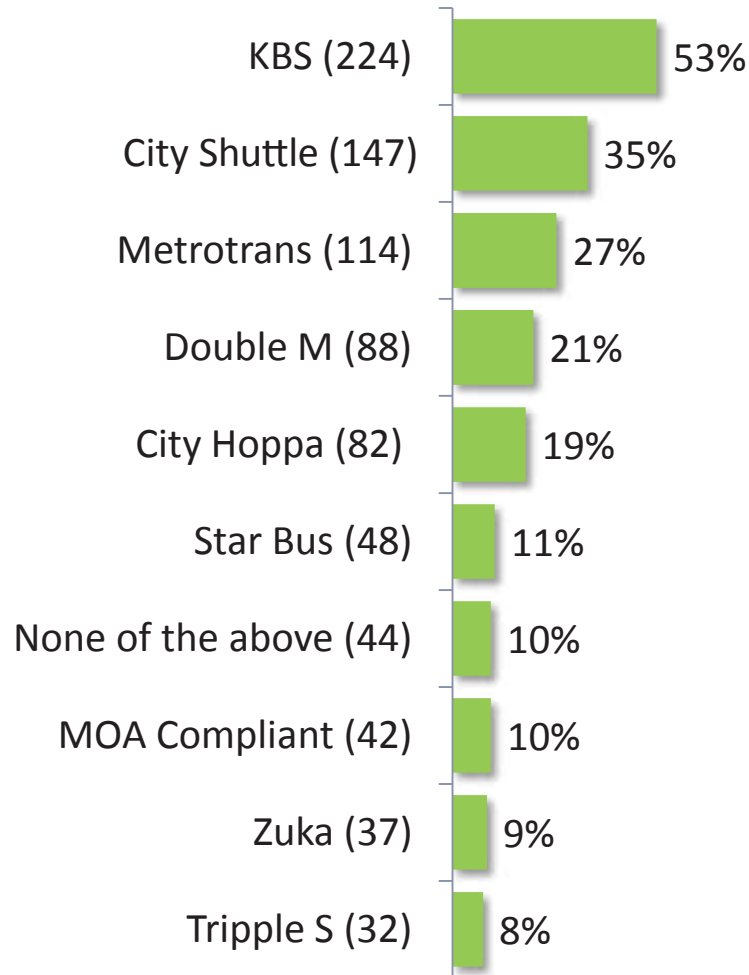


City Bus Usage Habits



The image features a solid green background. Three white circles are positioned on the left, right, and bottom-left. Thin white lines connect the right side of the leftmost circle to the left side of the rightmost circle, and the bottom of the leftmost circle to the top of the bottom-left circle.

Town Bus Usage by Commuters



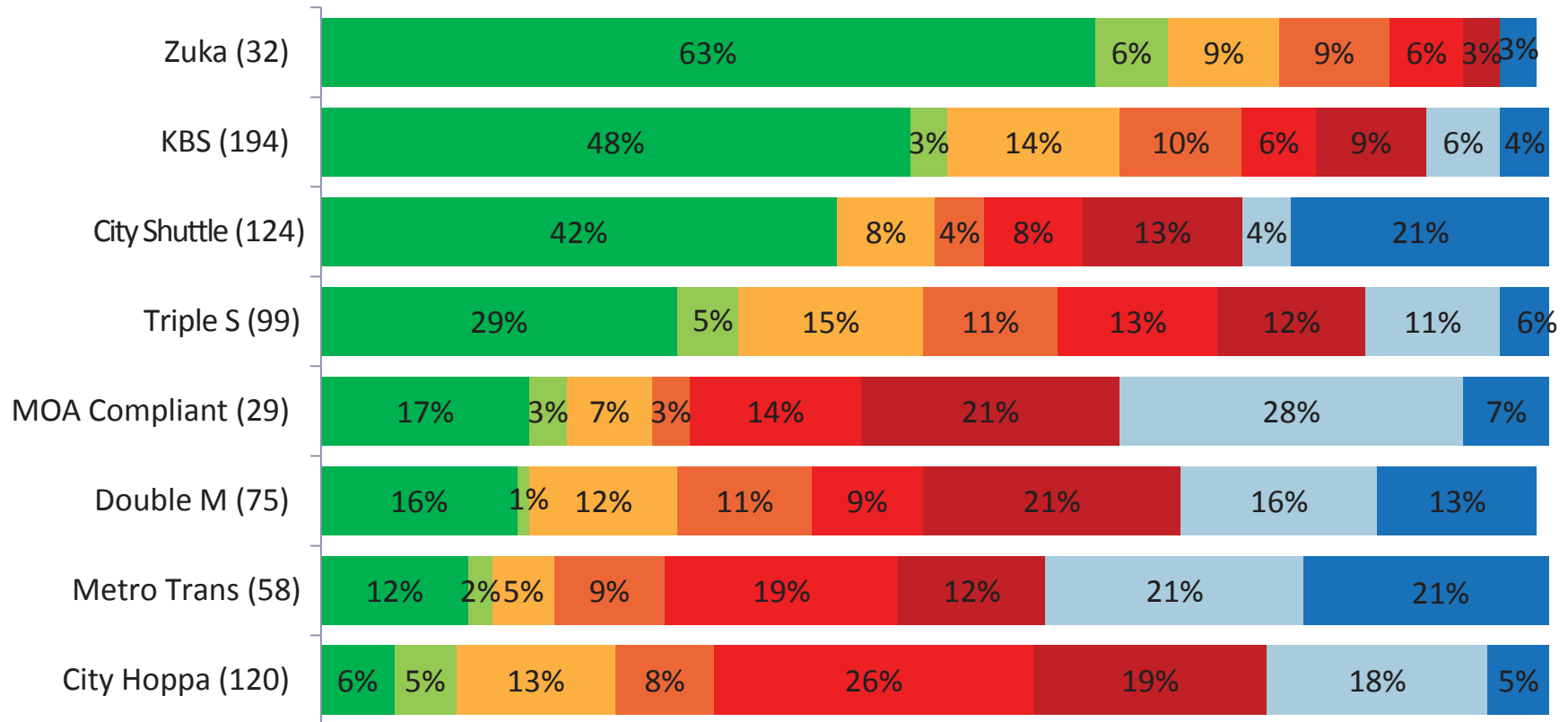
Buses used in an average week

Overall, KBS is the most commonly used bus amongst bus commuters (53%) this is followed by City Shuttle (35%) and Metrotrans (27%).

Town Bus Usage by Commuters – Frequency of usage

■ Every day
■ 6 days a week
■ 5 days a week
■ 4 days a week
■ 3 days a week
■ 2 days a week
■ Once a week
■ Less than once a week

Buses used in an average week



- Apart from the commuters in the Zuka buses which have been hired by corporates and institutions, we find that KBS is the most frequently used bus, by its commuters (48%) closely followed by City Shuttle (42%)
- KBS, the most commonly used bus, is used everyday by 3 out of 10 of its commuters.

COMMUTERS: REACH WITHIN LAST 3 MONTHS & FREQUENCY OF SEEING A BUS ADVERTISEMENT IN A DAY

Proportion of commuters that have seen a printed bus advertisement in the last 3 months = **81%**

Average number of times a day = **5 times a day**



Number of Times	Proportion
1	10%
2	28%
3	14%
4	14%
5	14%
6	8%
10	13%
15	1%
20	4%

$$\begin{aligned} &\text{Reach} \times \\ &\text{Frequency} \\ &= \\ &81\% \times \\ &5(\text{times a} \\ &\text{day}) \times 90 \\ &(\text{days} = 3 \\ &\text{months}) = \\ &365 \end{aligned}$$

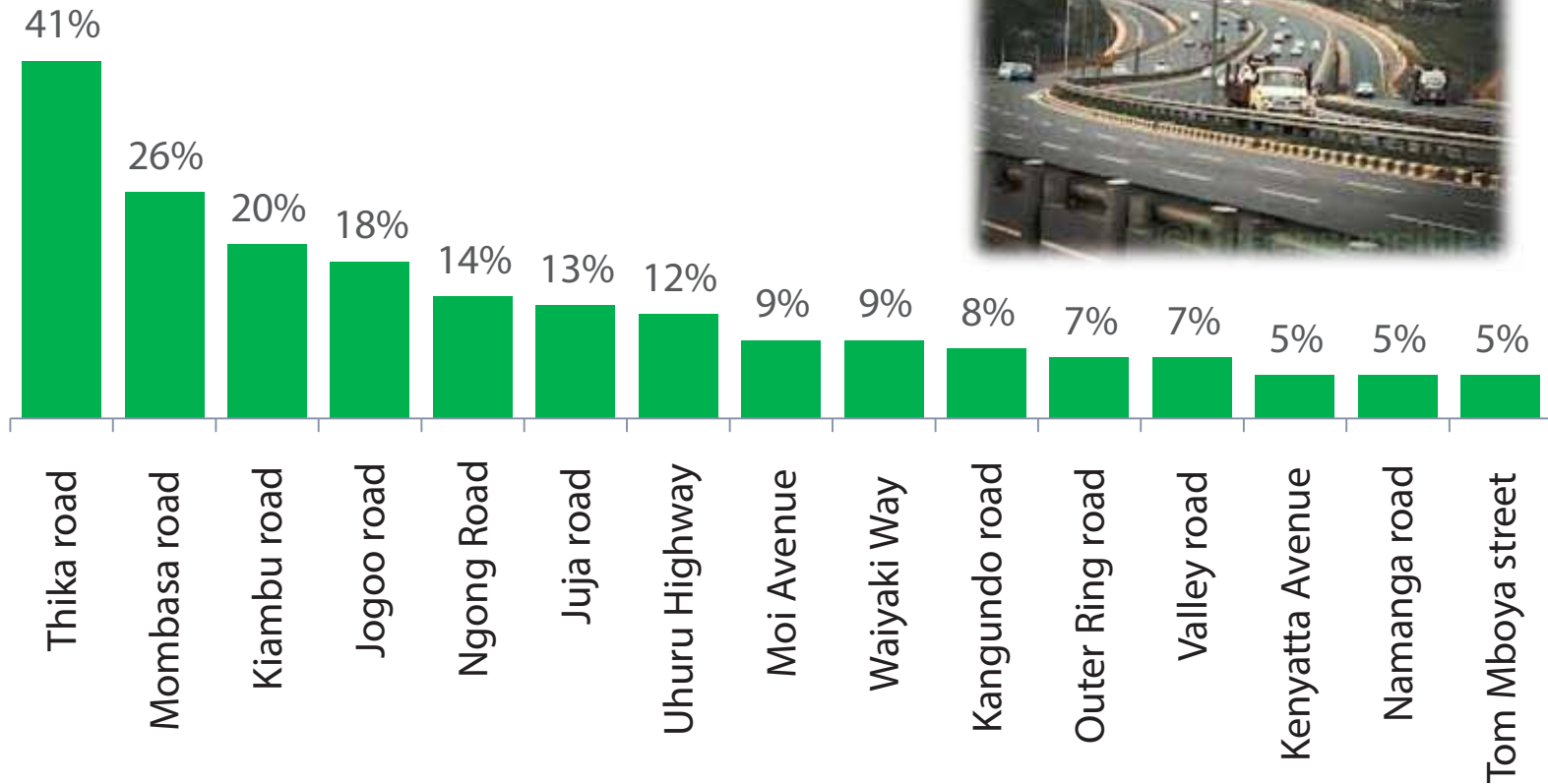
The **average** one-way town
bus journey lasts **30 to 40**
minutes

The average time it takes to
walk from home to the nearest
bus stop is **15 minutes**

25% of people live within **5**
minutes of a bus stop

53% of people live within **10**
minutes of a bus stop

Roads most travelled on in an average week



Thika Road is the most commonly used road amongst the general public in the target districts (41%) this is followed by Mombasa road (26%).

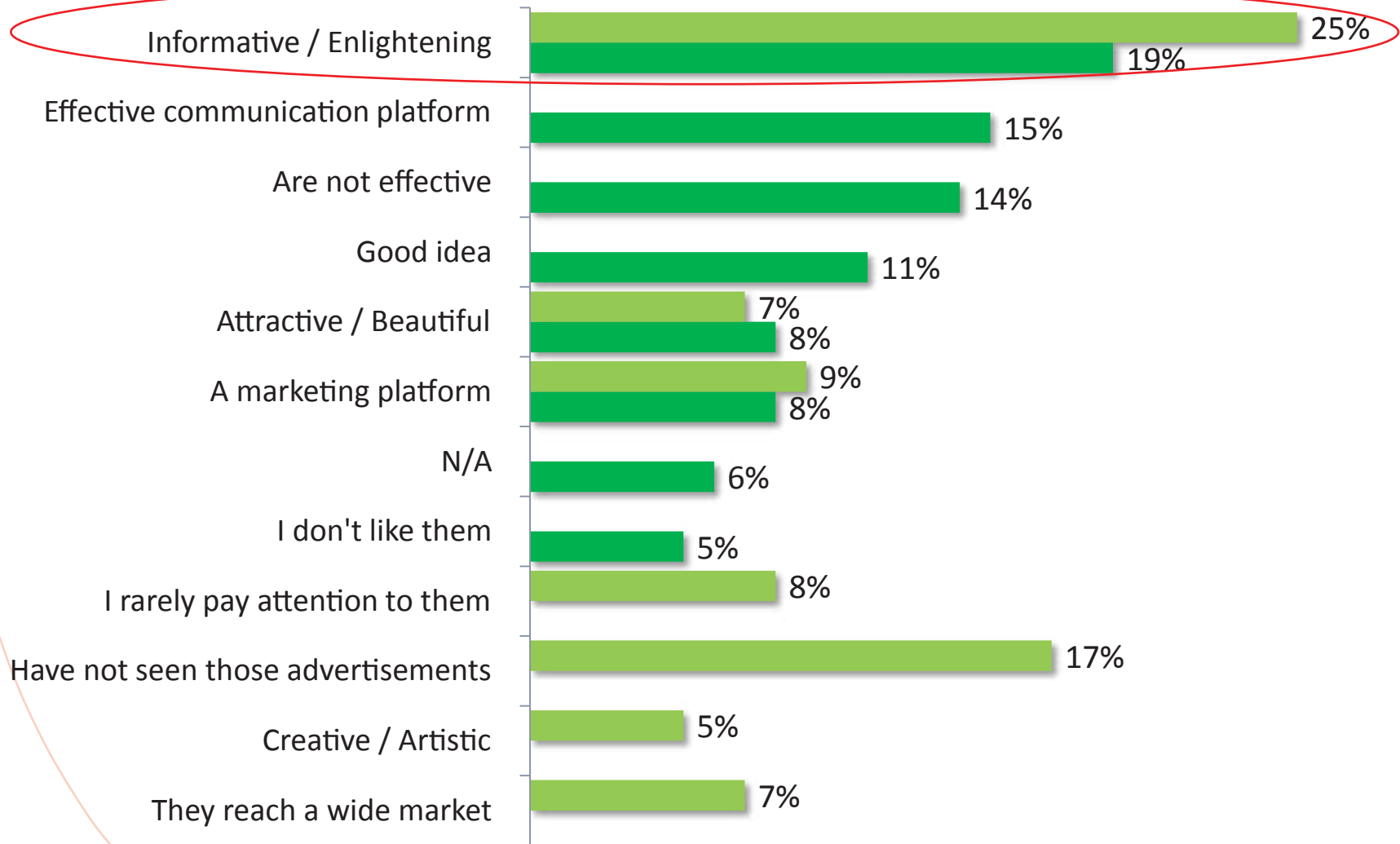


Transit Media: Commuter Perceptions, Effectiveness and Trustworthiness

Opinions of printed advertisements outside buses



■ General Public (328) ■ Bus Commuter (426)



Opinions of printed advertisements outside buses

"They enlighten
Kenyans"

"The adverts are
helpful and
informative"

"They are okay
'cause they create
awareness of some
new product"

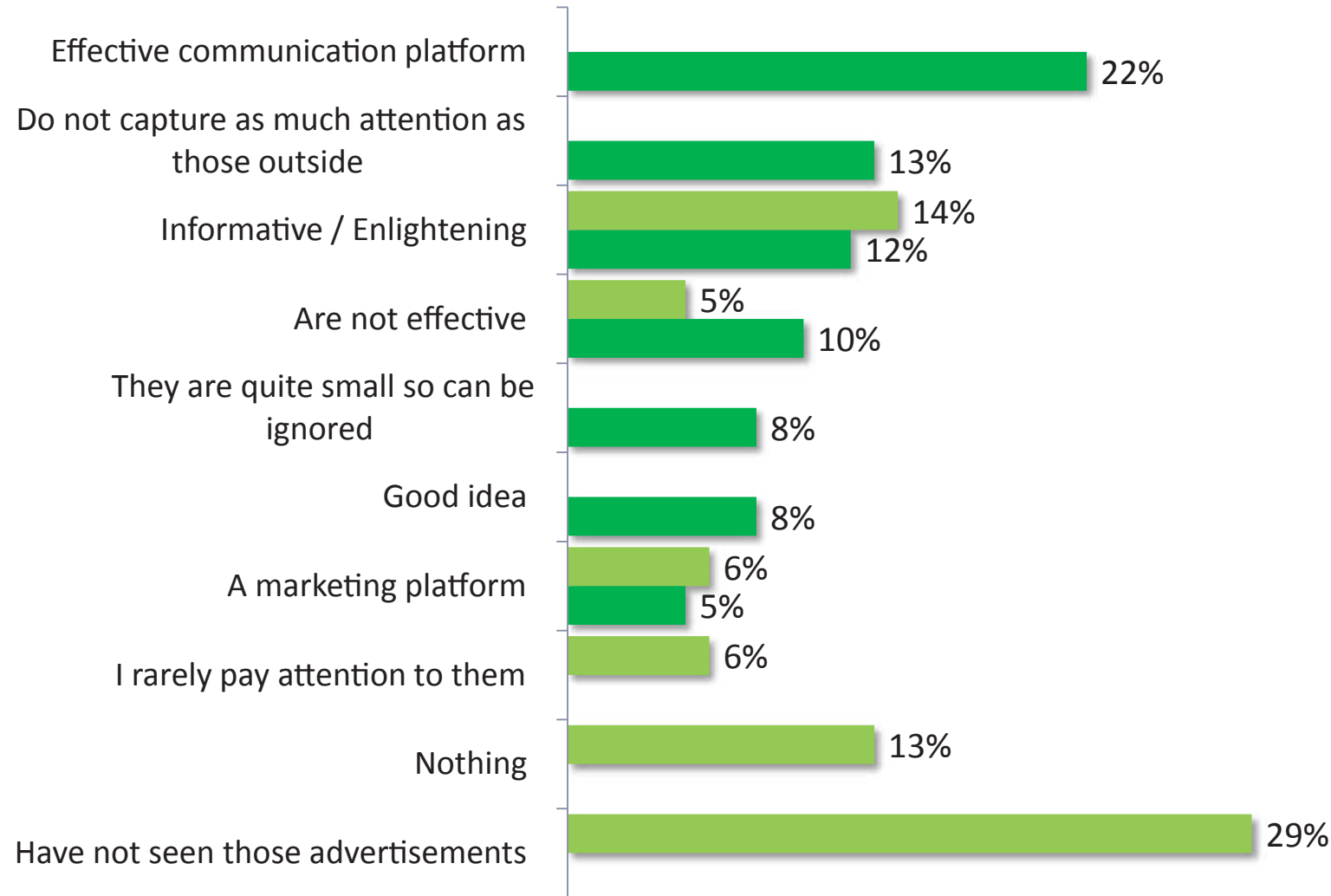


"Definitely the
message gets to
people because its
loud and clear"

"they are not
bad, they promote
a product"

Opinions of printed advertisements inside buses

■ General Public (328) ■ Bus Commuter (426)



Base: All Respondents

Q6a: What is your opinion of printed advertisements inside buses?

Opinions of printed advertisements inside buses

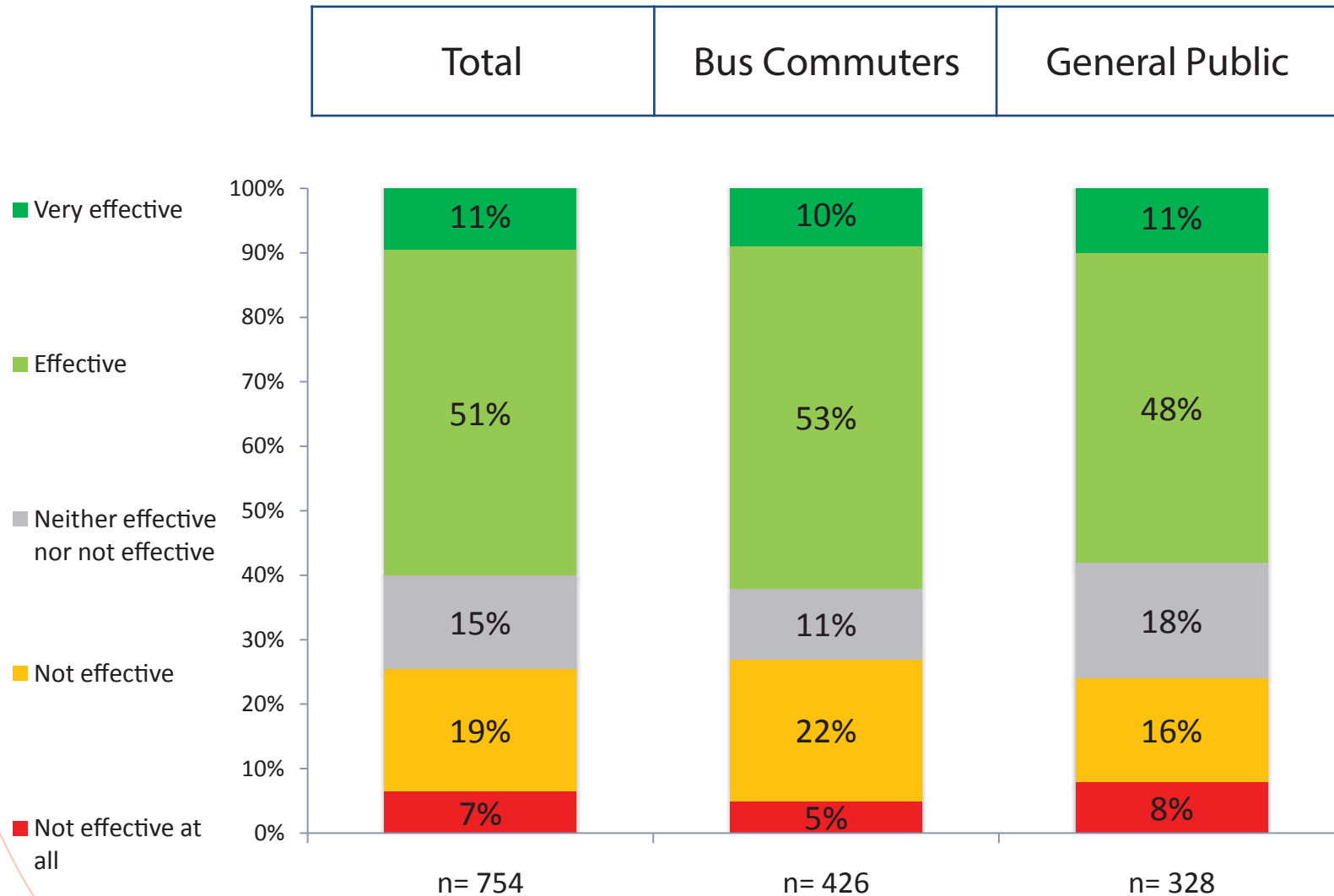
"They capture a huge number of people because buses travel a lot"

"They communicate well when [one is] reading them"



"They create awareness"

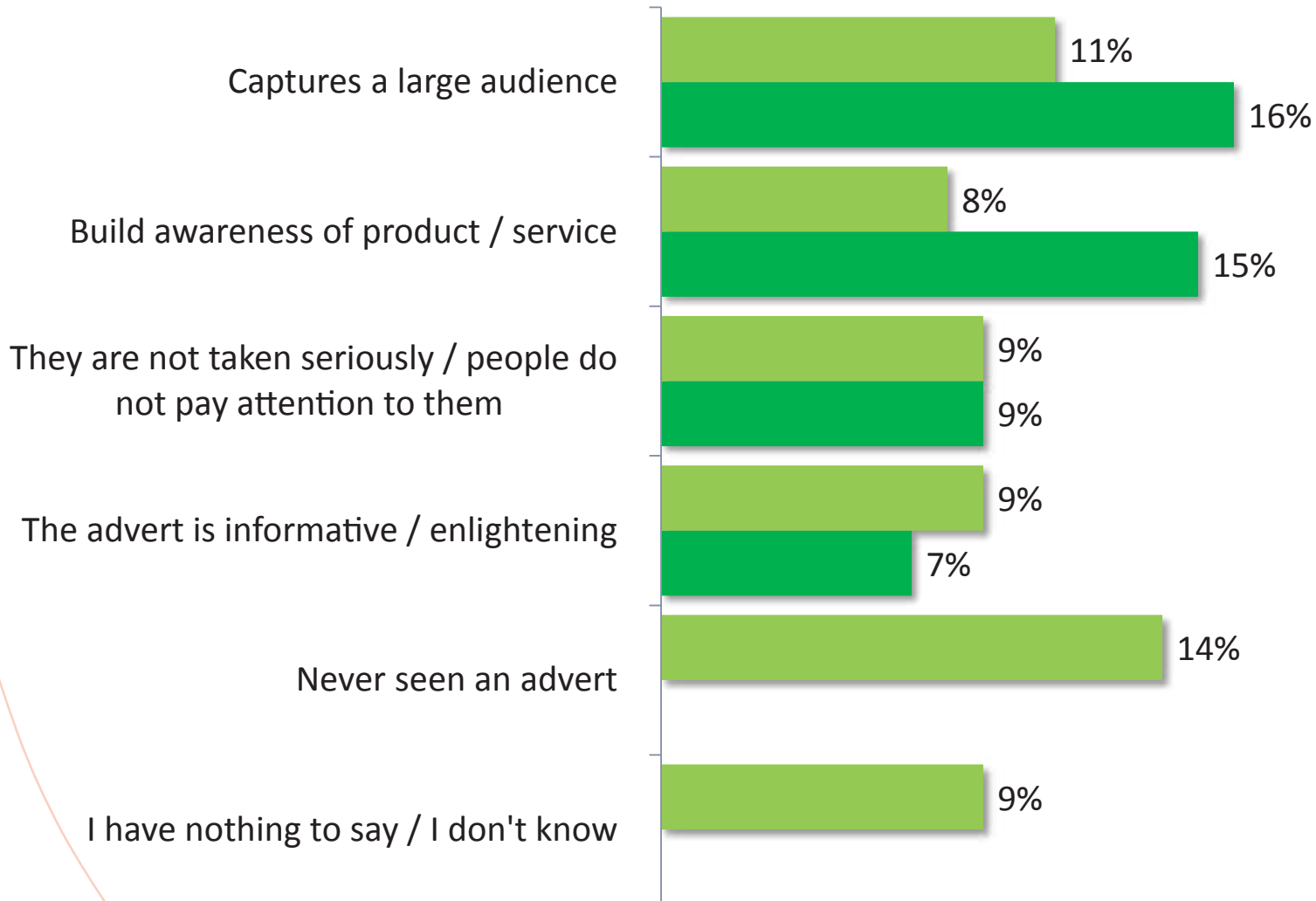
Perceived effectiveness of Printed Bus Advertisements on the outside of buses



Key reasons for the perceived effectiveness of printed advertisements outside buses

■ General Public (328) ■ Bus Commuter (426)

...because...



Key reasons for the perceived effectiveness of printed advertisements outside buses

"...they are entertaining and also make the bus look attractive"

"...they are innovative"

"...they capture attention of the public"

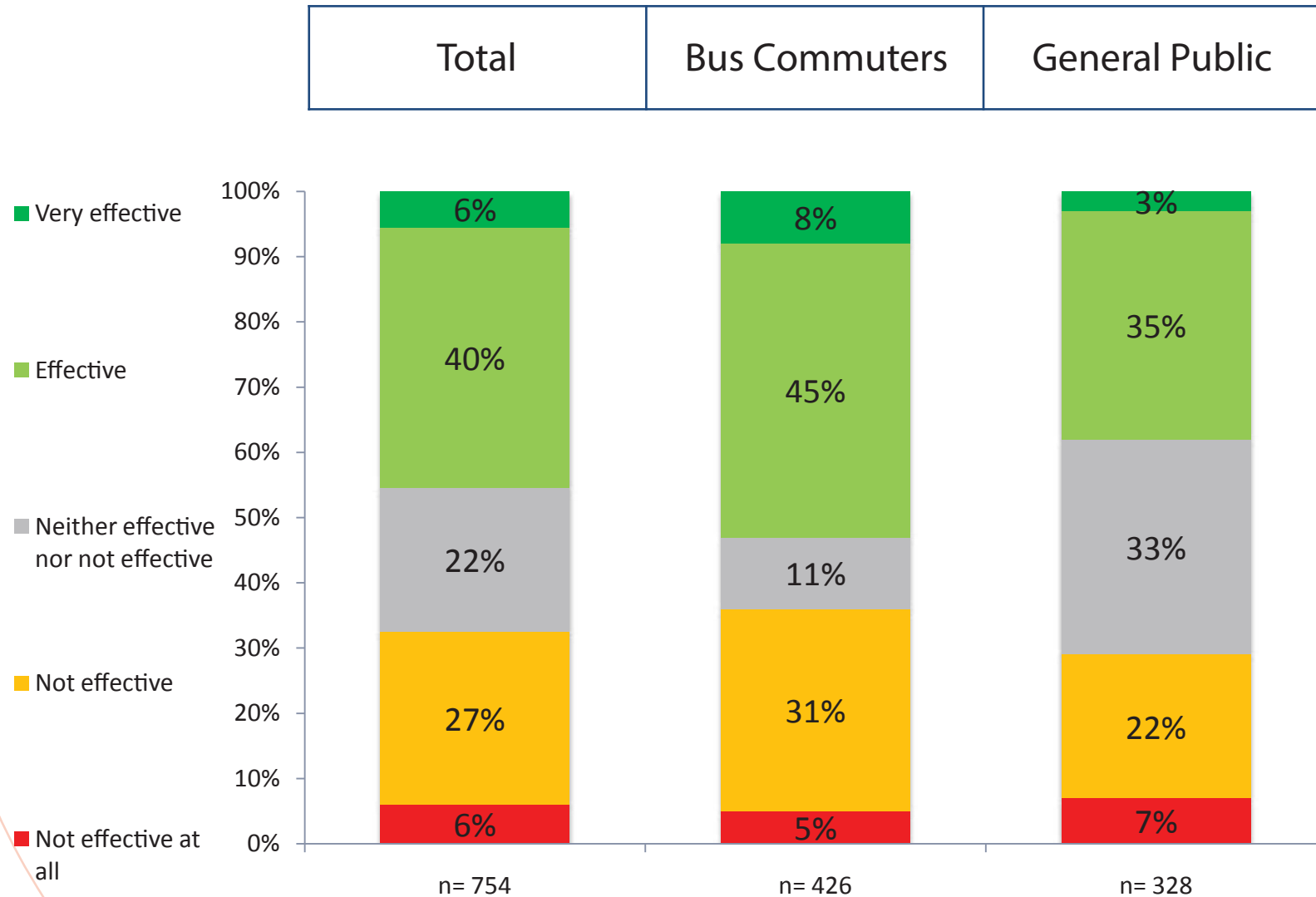
"...some of the adverts keep us informed of the products we can use"

...because...

"...they are distracting enough to make you want to read"

"...they are informative"

Perceived effectiveness of Printed Bus Advertisements on the inside of buses



Key reasons for the perceived effectiveness of printed advertisements inside buses

"It keeps us busy in the bus"

"The information is right at your face for around 30 minutes of your travel you can't keep ignoring it especially if you use the same mode of travel everyday"

...because...

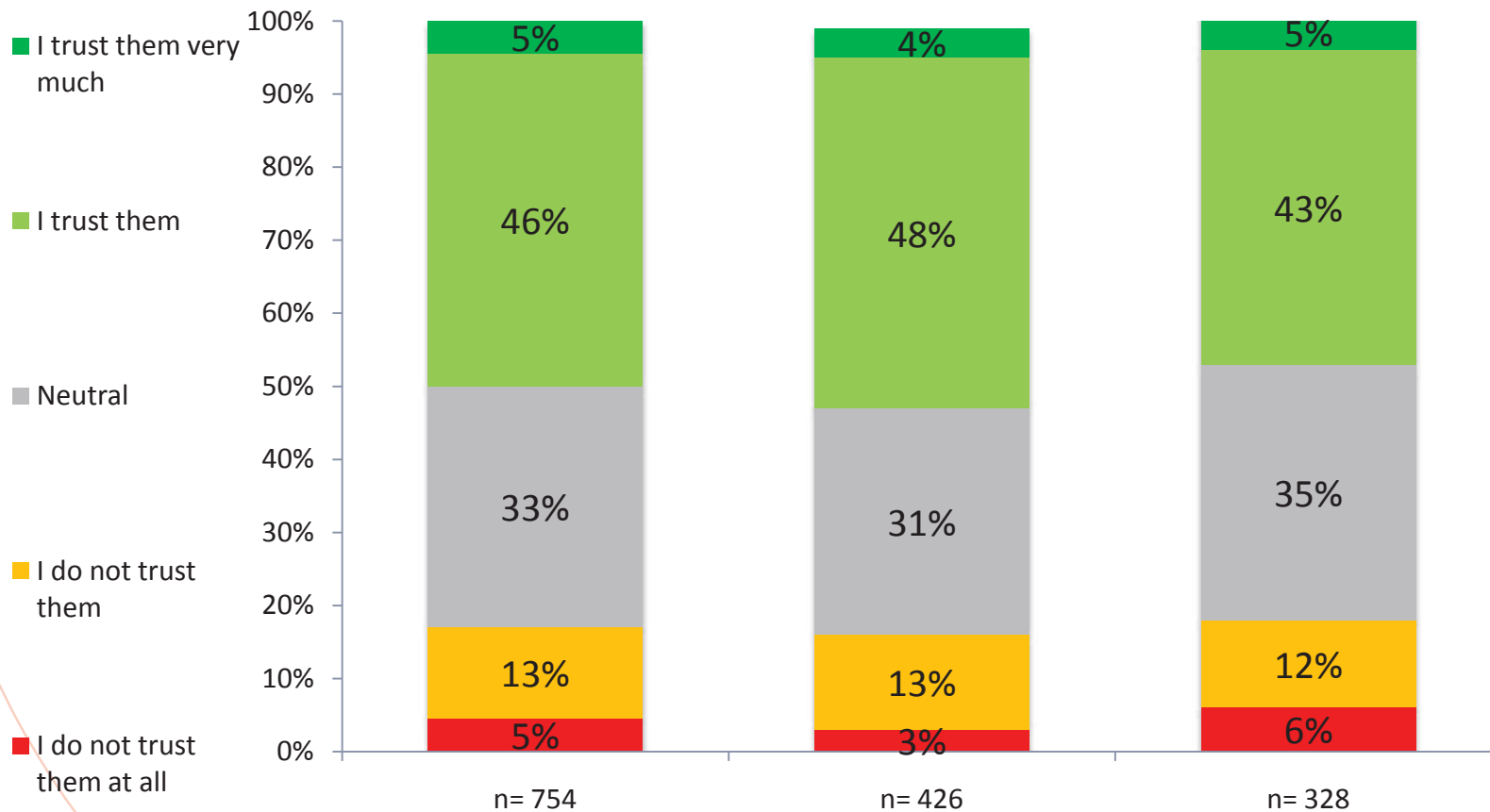
"...I usually learn from such"

"...people tend to go look for the products"

Perceived trustworthiness of Printed Bus Advertisements



Total	Bus Commuters	General Public
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Key reasons for the perceived trustworthiness of printed advertisements outside and inside buses

"...theadvertisements are from big companies that can't lie"

"...theyare bringing impact on the audience who read them"

"...Ihave seen them else where"

...because...

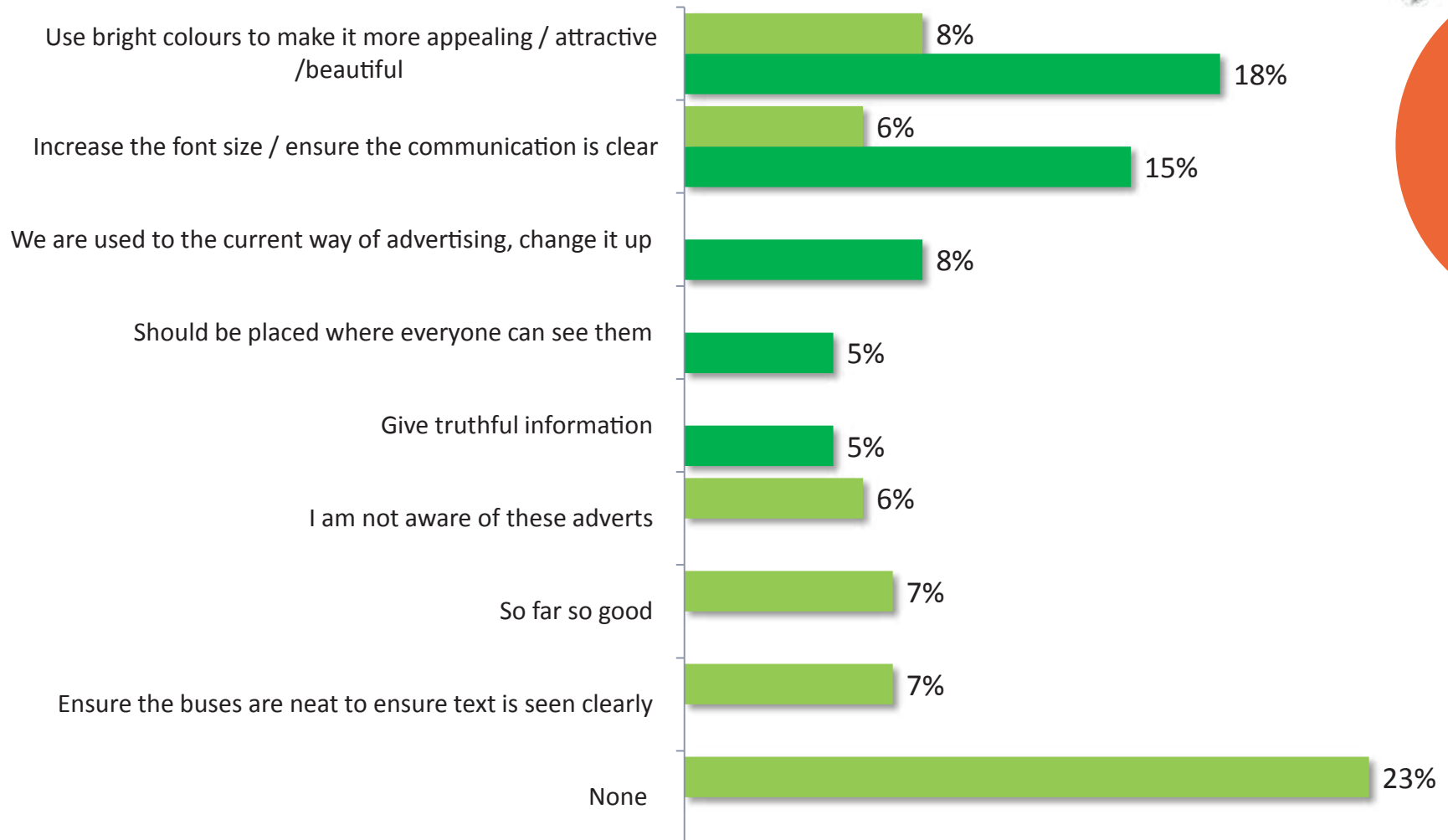
"...I trust them because they create awareness to the people"

"...it make's those buses look as if they are for those companies [that are advertising]"

Key suggestions on improving printed advertisements outside and inside buses



■ General Public (328) ■ Bus Commuter (426)



Base: All Respondents

Q8: What do you think can be done to improve printed advertisements on the outside or inside of buses?

Key suggestions on improving printed advertisements outside and inside buses

"For the inside, they should be put on both sides of the vehicles to make them easily visible."

"Use bright colours that are attractive"

"Use bold colours and letters that are understandable to all."

"They should be made more bigger and colourful so that they can be spotted"



"To be more clear and easy to understand."

"Use different people to advertise not only the similar faces"

"They should not use so much print on them and they should make the message more clear by using less wording"

Bus Media: Campaign Case Studies

BROADWAYS
CAMPAIGN

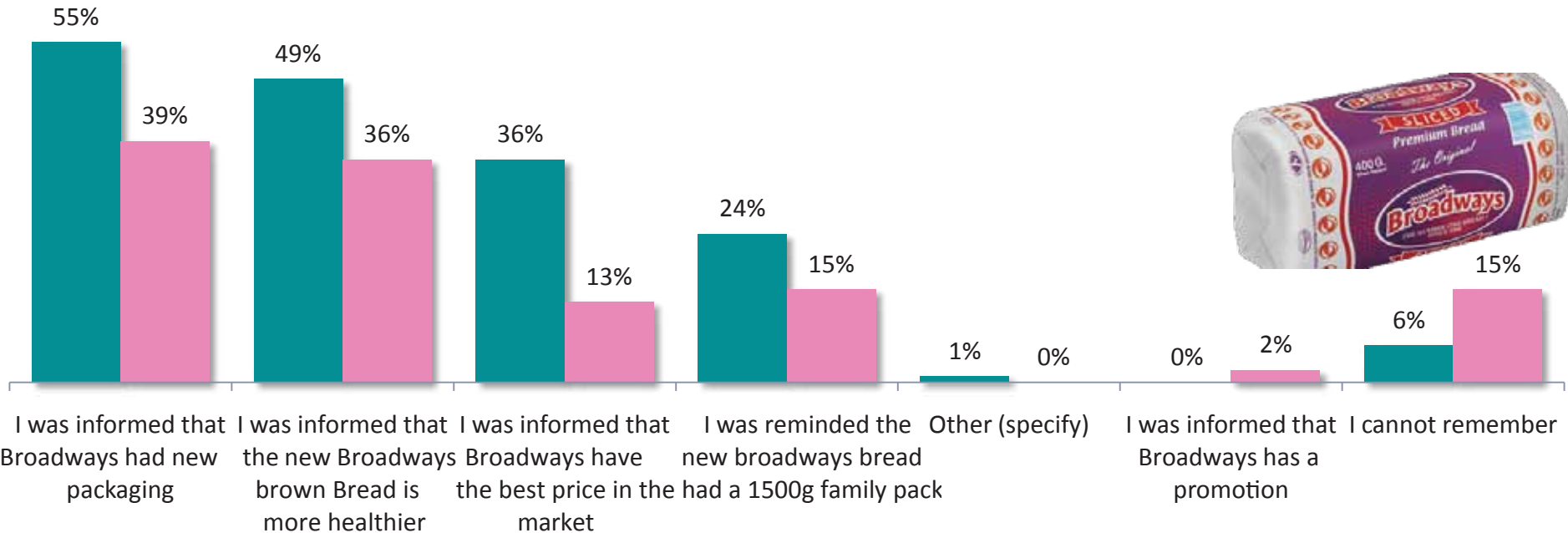


Impact of the New Broadways Campaign

- AWARENESS

- The Broadways Ads reached more commuters than the general public.

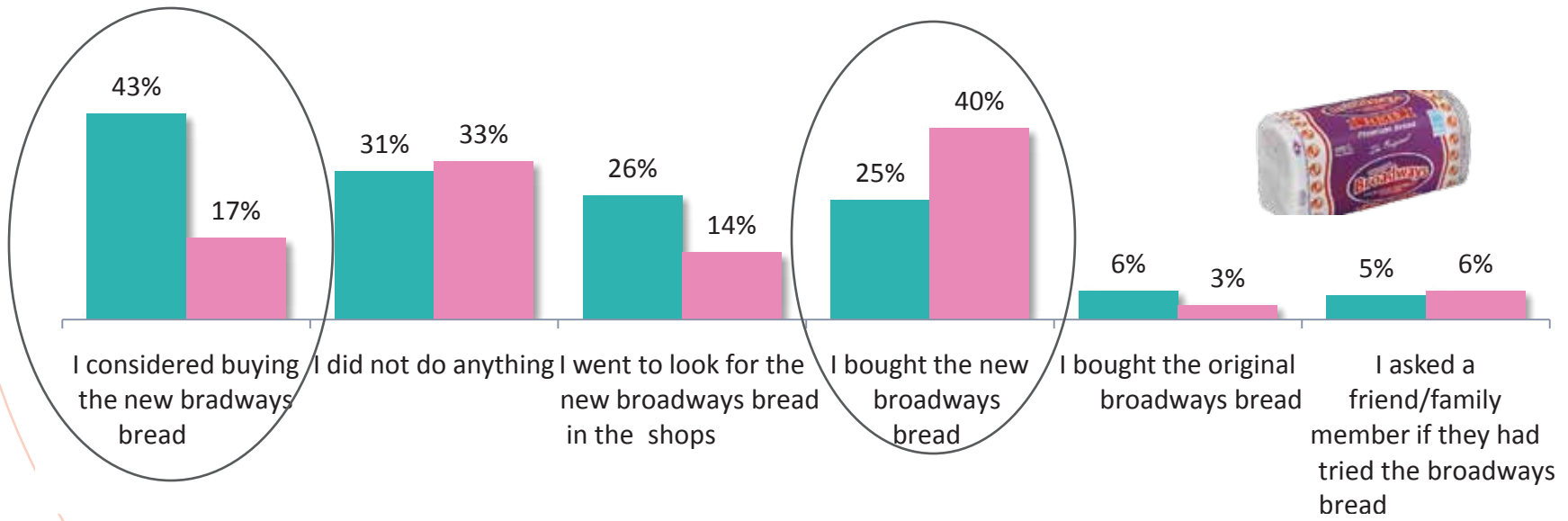
■ Bus Commuter (192) ■ General Public (61)



Impact of the New Broadways Campaign – CALL TO ACTION

- The call to action was stronger in bus commuters
- Amongst the general public, 40% bought the new broadways as a result of the campaign

■ Bus Commuter (192) ■ General Public (61)

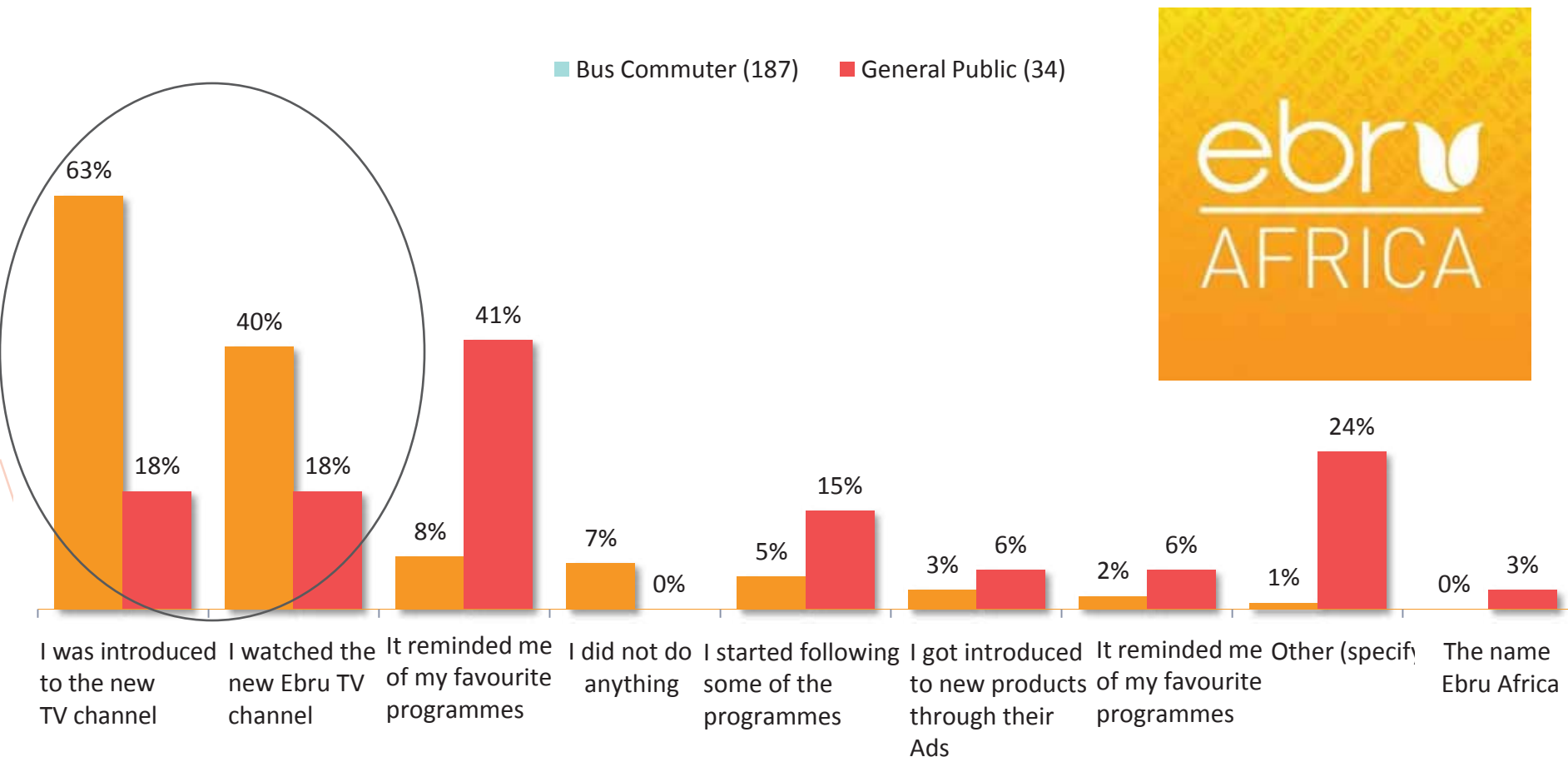


ebn
AFRICA



Impact of the Ebru Africa Campaign

- The Ebru Africa campaign reached more commuters than the general public.
- Commuters scored much higher on being reminded about the various programmes on the channel



Thank
you