



Viffa Consult

THE SOUND OF KENYA

Reflections of Music Listeners 2022

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Methodology

Item	Details
Sample Size	135
Survey Tool	Online & Telephone Interview
Sampling method	Purposive: Nairobi, Kisumu, Mombasa, Kajiado, Machakos, Kiambu, Nakuru Random: Within County

Introduction

Kenyan local music defined in this report as written, composed and produced in Kenya has experienced great transformation over the last 50 years and continues to reflect the changing social economic fabric of the country.

The transformation of Kenya's local music continues to take place both from the supply (music production value chain) as well as demand side (Taste and preference of listeners). The supply side has seen transformation in; the genres being produced, mediums carrying music, revenue model and industry technology among others. The supply side transformation being more pronounced in the last 2years courtesy of COVID 19 leading to loss of revenue from physical related music engagements with instance of artists virtually launching albums and performing virtual shows among others.

The demand side has experienced transformation in; taste and preference, disposable income and level of education among others more generally but specifically due to the negative effects of COVID 19 which led to reduced disposable income, restricted movement, closure of bars, restaurant and house of worship among others which has had an impact on music consumption.

There continues to be an ever-increasing concern by Kenyan artist and music practitioners that end consumers and mediums such as radio, TV stations and DJs don't appreciate and consume enough of music produced by local artist.

Similarly, on the flip side there have been concerns from a section of music listeners on the declining state of depth both from a spiritual and cultural perspective as well as weakening role of music in catalyzing social justice conversations.

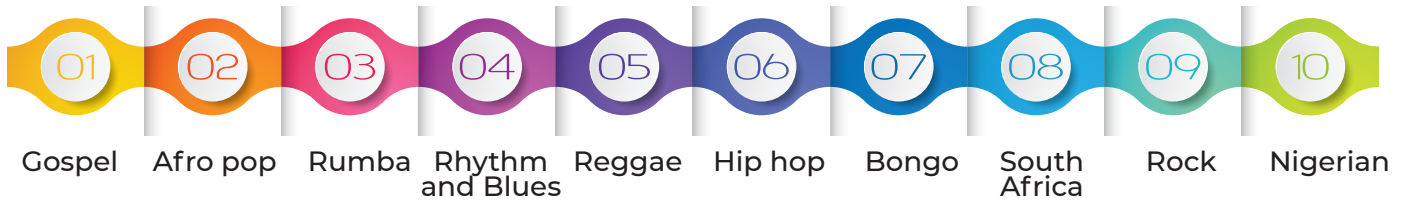
Viffa conducted its fourth edition survey between 3rd and 10th January 2022 to bring out the reflections and perception of Kenyan audiences in regards to Kenyan music.

The objective of the survey was to establish



Survey Results

Top 10 music genre listened to in 2021



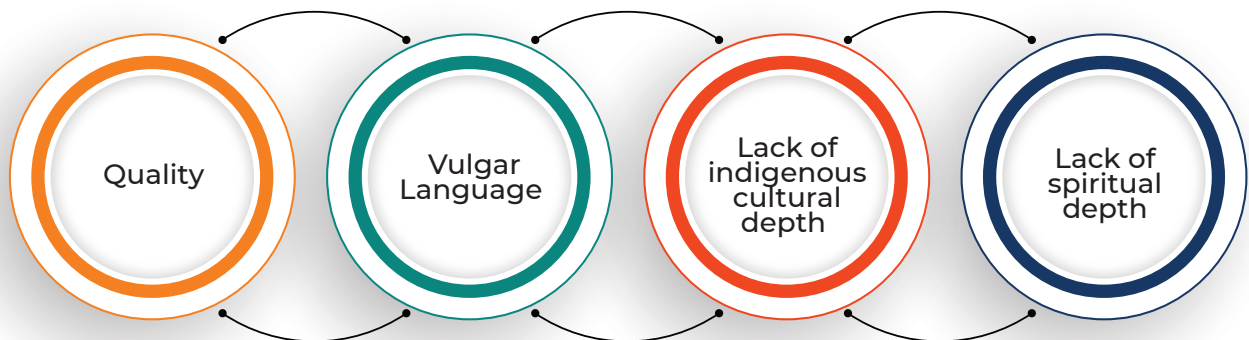
Insight

Most genres have been consistent in terms of listenership the last three years except for kwaito, gengetone, house, jazz and vernacular that have experienced fluctuations. Gospel continues to be the dominant genre in the years 2019 to 2021

Top factors that encourage listenership of local music.



Top Factors discouraging listenership of local music



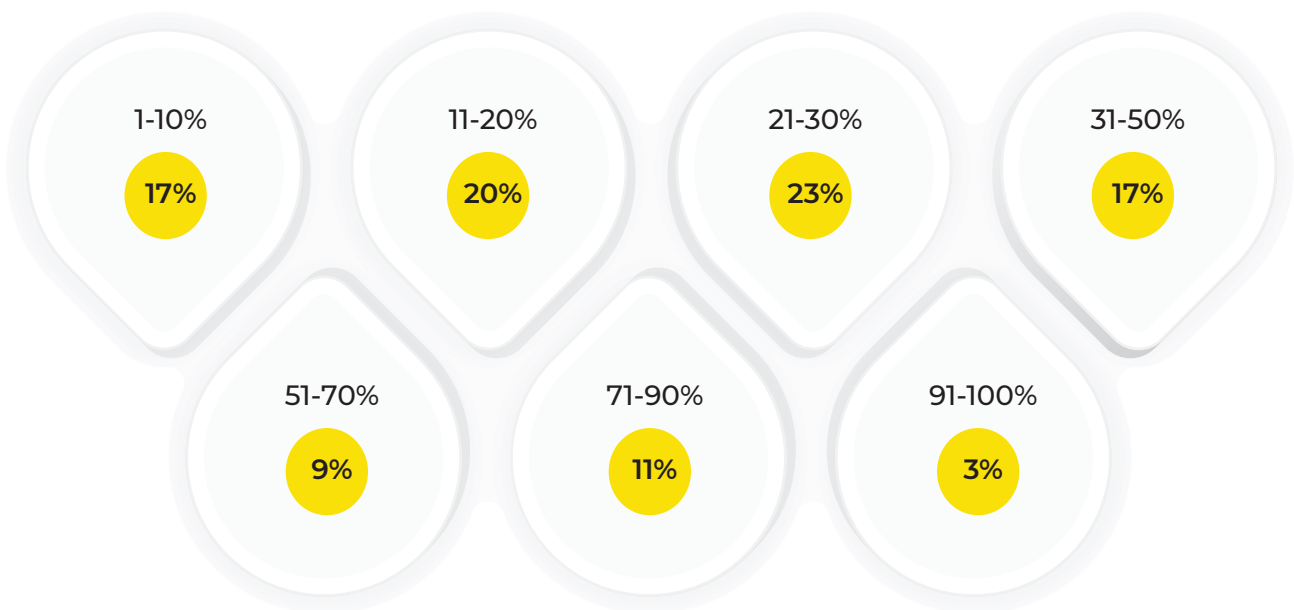
Insight

Music value chain stakeholders must consider the factors that promote listenership of local music whilst also taking into consideration factors that discourage or prevent incremental consumption of local music

Further consideration should be on striking a balance between being relevant and trendy with embedding sound with depth either spiritually or culturally to ensure longevity as well as originality.

What percentage of total music you listened to in 2021 that was local

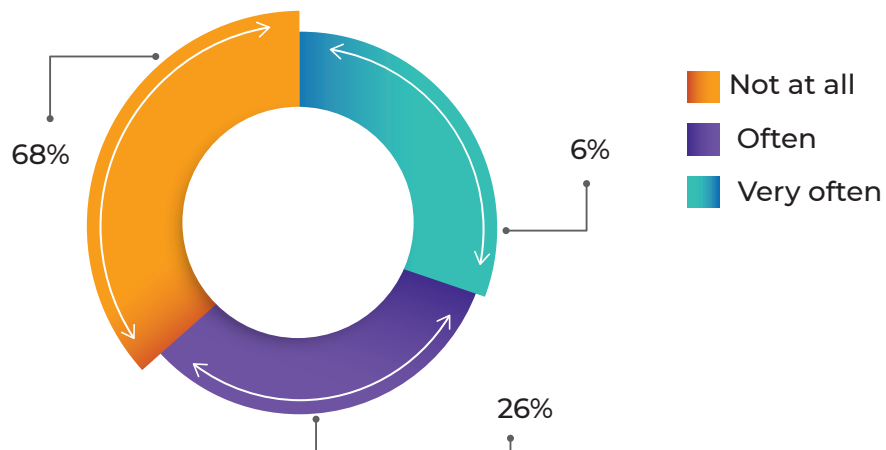
(Written, composed, and produced in Kenya).



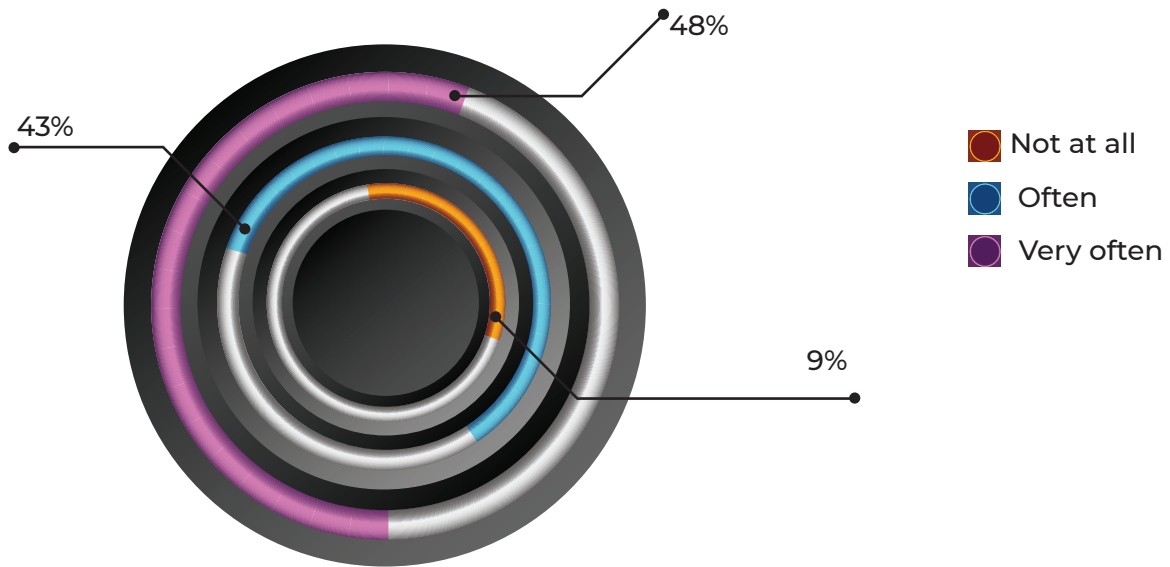
Insight

77 percent of respondents indicated that local music constitute at least 50 percent of all the music they listened to in 2021 with 23 percent indicated local music constituting more than 50 percent of their total music listenership.

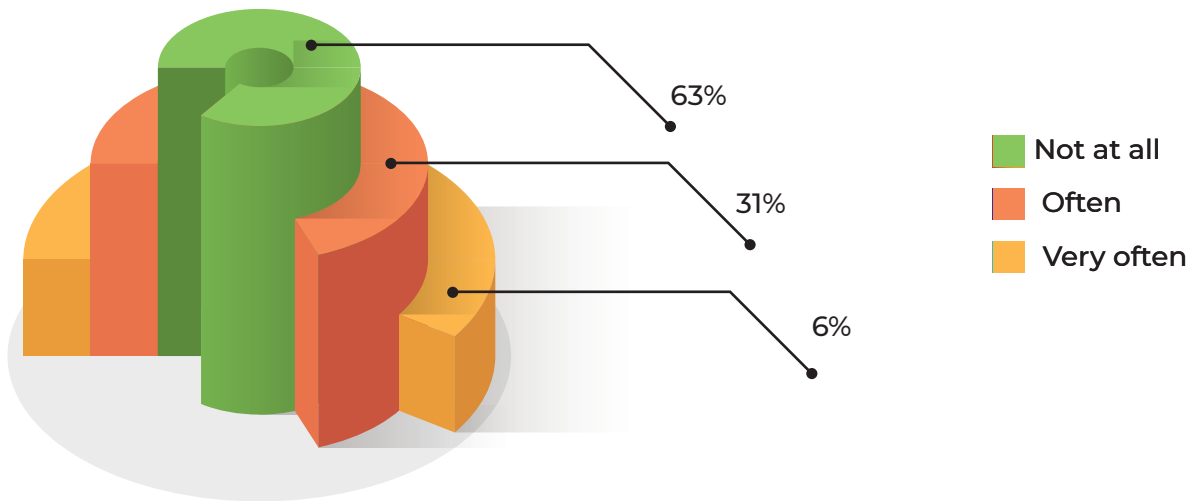
Frequency of local music purchase (Either digital or physical format) in 2021



Frequency of online streaming of local music in 2021



Frequency of downloading local music from file sharing website or App in 2021

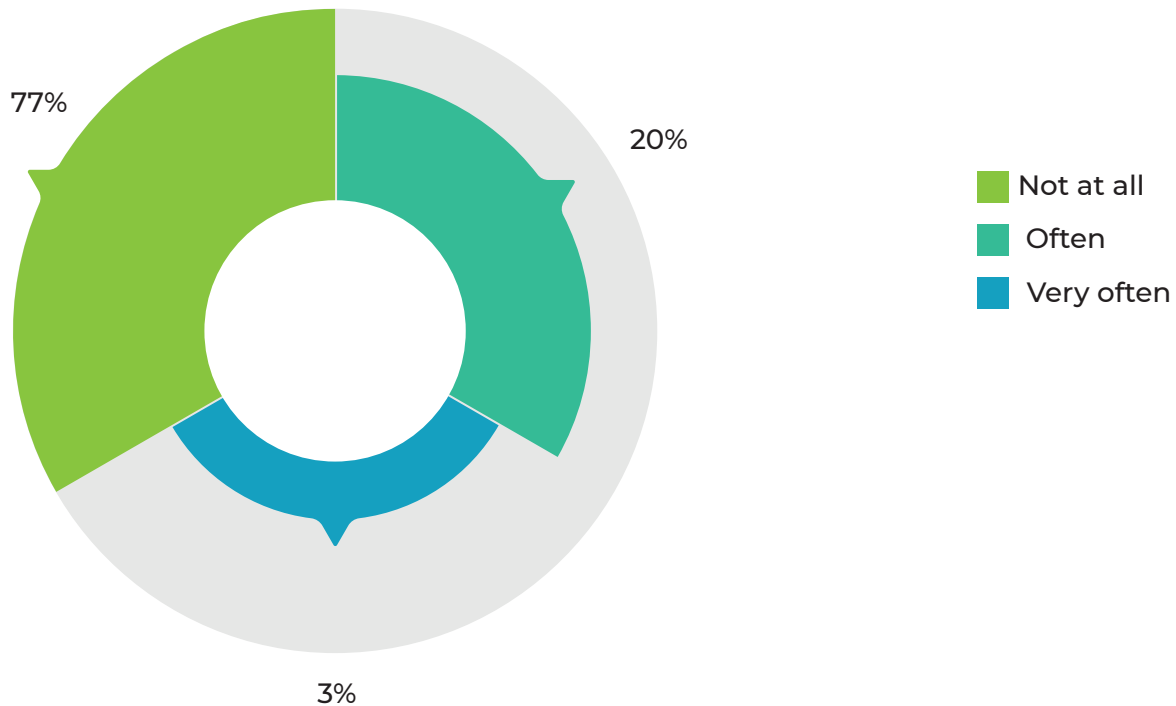


Insight

32 percent of respondents indicated that they purchased local music in 2021 while 68 percent indicated they didn't purchase. Despite the low purchase of local music there is a huge potential for innovative monetization of music as there is a high consumption online where 91 percent respondents indicated they streamed music online

Further, although the portion of respondents not purchasing local music in 2021 was high 68 percent this was a significant improvement compared to 2020 which was over 80 percent

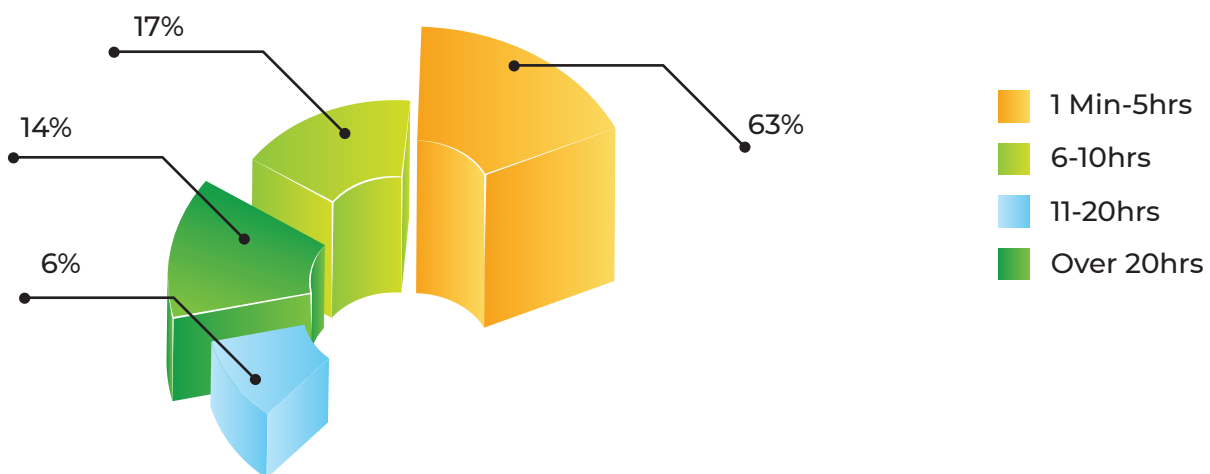
Frequency of attending live musical performances in 2021



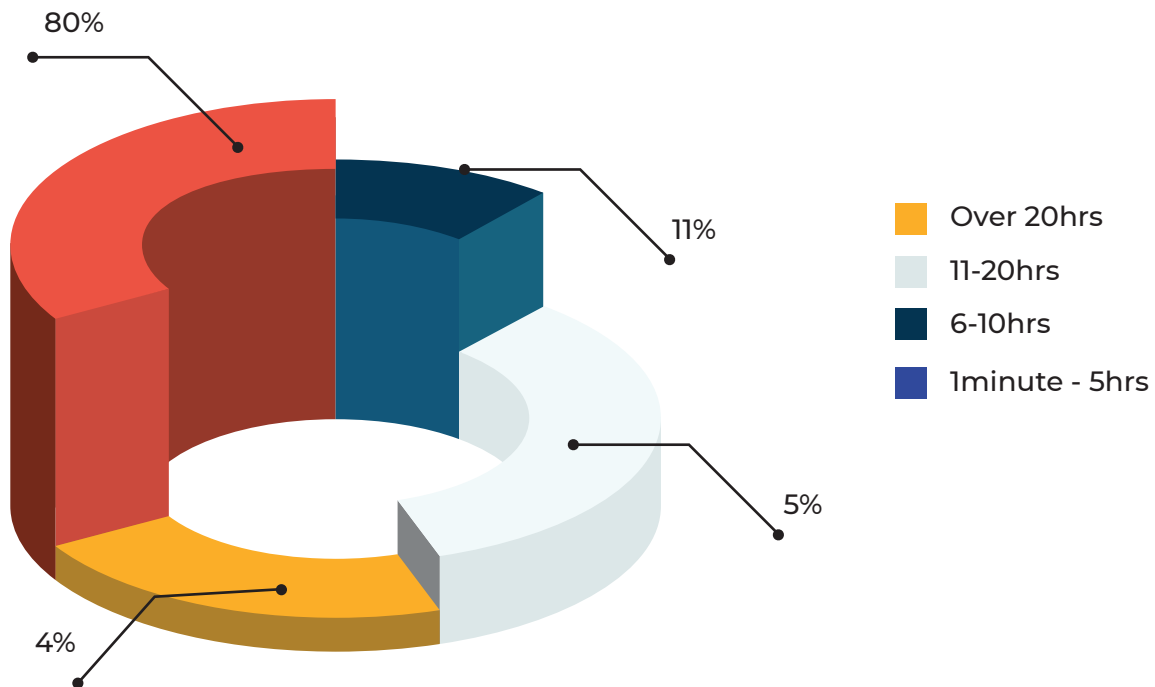
Insight

A super majority of respondents indicated they didn't attend any live musical performance though this changed in the last quarter of 2021 after government of Kenya opened up the economy through lifting movement restriction. Despite the restriction several artists found innovative ways of performing through digital platforms in 2021

Time spent listening to music on streaming websites and Apps

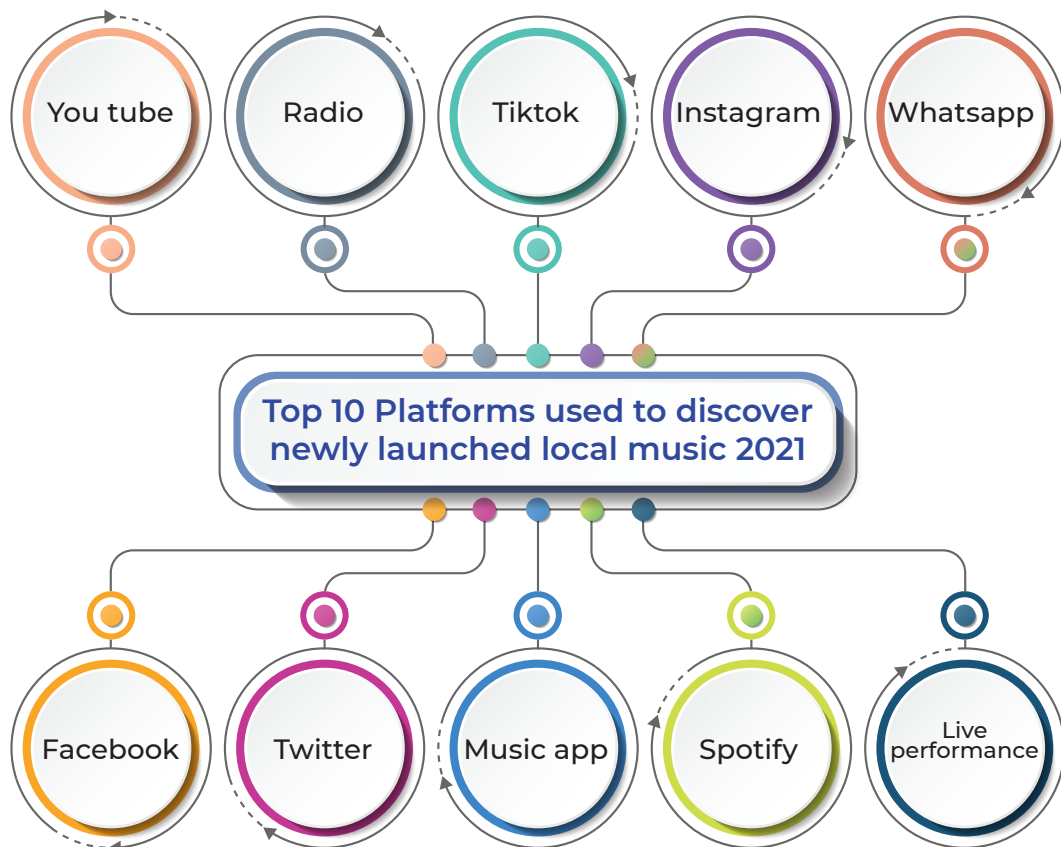


How many hours a day did you spend listening to the radio in 2021



Insight

Radio remains an important medium for music listenership and must be explored in complimentary to digital platforms



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