TITLE: A billion reasons to sell Africa -

a Kenyan case study

by Jackie Christie

Degree Project Assignment
Course Code: KK524C
Submission: January 2014
Supervisors: Ayub Arioba (TZ) Anders Hög Hansen (MAH)
# Contents

1 Abstract

2 Introduction
   2.1 Aims and objectives
   2.2 Context outline
   2.3 Research design

3 Literature Review

4 Methodology
   4.1 Visual sociology and semiotics – deconstructing how things ‘mean’
   4.2 Focus groups
   4.3 Semi-structured interviews
   4.4 Reflective practice

5 Analysis
   5.1 Who is rising and who is left behind?
   5.2 Characterizing the Kenyan consumer
   5.3 Primary research in advertising impact
   5.4 Ways of seeing – semiotic analysis of Africa Rising images and billboards
   5.5 Cracking the codes

6 Conclusion

7 References

8 Appendices
Abstract

‘Africa Rising’ is an ideology which is gaining increasing traction and momentum amongst economists, analysts and those who would wish to present a positive perspective on the continent’s future.

Advertising, more than any other mass media platform stratifies its audience along patterns of consumption and as such manipulates, underlines and marks social difference in ways which are now so embedded as to be commonplace. Using a familiar repertoire of images, Africa Rising is ‘advertising’ the message of positivity and optimism in the same way a soap manufacturer might sell a new handwash. The language and techniques of mass-market billboard advertising – what Stuart Hall would identify as a signifying practice – have technical and semiotic echoes in the branding applied to this ‘renaissance’ theme. The effect of this ideological makeover is to forge a conducive environment to gain buy-in from a sector of Kenyan society that can afford the luxury of the aspiration Africa Rising promises. The messages and values communicated by Africa Rising demonstrate ‘a new ideological use for pictures’ (Sontag 2003: 29), however they are not targeted to those at the base of the pyramid who remain socially and economically trapped by poverty and basic subsistence.

The visual rhetoric employed by Africa Rising mines a semiotic vocabulary replete with norms and codes which have meaning inside and beyond the continent and which rely on traditional and received visual conventions. If the African renaissance is to translate into a meaningful ideology of transformation rather than ‘a new brick in the wall of cliches’ (Pieterse 2002: 60) it has to speak to all sectors of society and recognize that external indicators of progress do not necessarily serve those who least have the means to serve themselves.
2 Introduction

2.1 Aims and objectives

The aim of this paper is to explore the now ubiquitous concept of Africa Rising with a particular focus on the images and visual rhetoric used to promote it. I will explore how the images compare to those used in mass market advertising in particular billboards, and examine the mythic structure at work in both via a semiotic analysis and application of visual sociology. Through focus group discussion with people from different socio economic backgrounds I will explore how billboard advertising of this kind affects individuals and influences the choices they make. The objective of the research is to discover whether those at the bottom of the economic pyramid are being ‘written out of mainstream narratives’ \(^1\) by an exclusive visual rhetoric whilst at the same time supporting the growth above them.

---

\(^1\) Solome Lamma, Co-founder and Executive Director AiD retrieved from http://naiforum.org/2013/11/against-the-gospel-of-africa-rising/ Against the Gospel of ‘Africa Rising’
2.2 Context outline

For approximately a decade the concept of economic growth on the African Continent has achieved widespread affirmation. The IMF in its World Economic Outlook report published in April this year estimated annual growth rates for Sub-Saharan region above 5%, and talked of the ‘resilient nature’ of the continent to global economic shocks. Whilst they may have tempered this growth forecast for Sub-Saharan Africa a few months later, it pointed to external factors for this revision, namely the Eurozone crisis and global financial volatility, rather than any homegrown failures. Prior to this turning point Africa still suffered from a historical label as a failed continent – politically, socially and economically. It is only in the last decade that the fate of the continent has taken on a more optimistic tone.

In line with the continent wide view, the Kenyan context is fairly typical of a number of low income sub-Saharan African countries: growth expected somewhere between 5-6%; fluctuating interest rates but often quite low for extended periods; fairly conducive governance environment; poverty levels at somewhere between 34% and 42%. Huge infrastructure projects like the Mombasa to Nairobi rail link, the Lamu Port project and the discovery of commercially viable quantities of oil in North West Kenya are set to help Kenya achieve much coveted middle income status well before its target of 2030.

It has become popular in economic forums to talk about the growth of the African middle class, ‘widely acknowledged to be Africa’s future’ according to the African Development Bank (AFDB). Not only is this group considered to be the economic powerhouse behind the continent’s growth but also the crucible for democracy and reform. Figures from AFDB show Africa’s middle class rising to 34 per cent of the continent’s population, roughly 300 to 500 million people. According to AFDB there exist three distinct groups which constitute the middle class:

- A ‘floating class’ of people with per capita consumption of between $2 and $4 per day
- Lower middle class who spend between $4 and $10 per day.
- Upper middle class who spend between $10 and $20 per day.

---

2 World Economic Outlook update in July 2013 revised Sub-Saharan Africa’s growth forecast from 5.4% to 5.1%. http://www.imf.org/external/pubs/ft/weo/2013/update/02/

The growth rate of the middle class over the past 30 years was about 3.1 per cent, slightly faster than that of the total population. The middle class was responsible for at least half of Africa’s GDP of $1.6trillion in the last five years.\(^4\)

Reading further of the AFDB’s report, the ‘floating class’ made up of approximately 180 million people, is actually the largest of the three middle class brackets. This vulnerable group is most likely to slip back into poverty hovering as it does on the cusp of the poverty line defined as being $2 per day. Already the optimism with which such reports are met do not bear close scrutiny.\(^5\)

However what such reports do is create more momentum behind the afro-optimism which is said to be sweeping the continent.

\subsection*{2.3 Research design and key questions}

This paper seeks to answer the following research question: Is the concept ‘Africa Rising’ an attempt to re-brand Africa using techniques employed by the advertising industry and do the messages it contains translate in the same way to different socio economic groups? It explores what Africa Rising means and examines the images and iconography used to promote it to examine to what extent this draws on imagery used by advertisers in Kenya. The paper seeks to examine if the poorest members of society are excluded from this ‘rise’ by the way in which merchandising of any kind is promoted to different socio economic groups.

The paper focuses on data collected from qualitative methods: - a series of focus group interviews and a photographic capture with two supplementary in-depth interviews. The focus groups were drawn from two different socioeconomic backgrounds which traced the route of a particular road which segments the two communities – one an informal settlement Kawangware and Wanyee and another a middle class neighborhood either side of Ngong Road – Jamhuri and Kenyatta Flats.

Key questions:

\begin{itemize}
  \item Is Africa Rising a concerted attempt to re-brand the continent after decades of negative historical narratives?
  \item What is the meaning behind the images which are being used to ‘sell’ and package African hope and how do these compare to the way other products and goods are sold?
  \item Does it follow that Africa Rising only targets a limited segment of the Kenyan population ie those who are exposed to the ‘offer’ – and who is rising and who is being left behind?
  \item What are the implications for development co-operation and how the rest of the world engages with Africa?
  \item Will the seductive narrative of Africa Rising with its focus on GDP and economic indicators drown out the voices of those at the base of the pyramid?
\end{itemize}

\(^4\) http://www.afdb.org/fileadmin/uploads/afdb/Documents/Publications/The%20Middle%20of%20the%20Pyramid_The%20Middle%20of%20the%20Pyramid.pdf

\(^5\) ‘Are one in three Africans really middle class?’ http://edition.cnn.com/2011/BUSINESS/05/20/middle.class.africa/
Use of focus group discussions

I chose to conduct focus group discussions because I felt it best mirrored the key theoretical framework I have chosen to look at in my study – semiotics. It could be argued that the relationship between what is encoded and decoded in messages is also reflected in the dynamics of discussion amongst and between individuals in a group setting. Messages are constantly being shaped by lived experience, and therefore the responses people give when confronted with images illustrate the multifaceted and subject nature of communication of this kind.

Five focus group discussions each containing maximum of 10, minimum of 8 (fifth group had 5) people took place in August 2013. Groups were mixed gender, in each segment a group under 35’s and one over 35’s. Groups took place in two very different socio economic segments. They were sourced from neighborhoods adjacent to the Southern and Northern route (Appendix 1). The northern groups were recruited from the informal settlement of Wanyee and Kawangware (LSM 1–5) and the Southern groups from two ‘middle class’ neighborhoods of Jamhuri and Kenyatta Flats along Ngong Road (LSM 5–10).

All the interviews were conducted by a professional freelance researcher alongside a note-taker. An independent researcher was employed as three of the groups were conducted in Kiswahili. All the conversations were recorded with a view to being translated and transcribed at a later point. Six recruiters were used to identify individuals to take part in the groups. Two groups took place at venues along the northern route and three at venues along the southern route.

Photographic capture – visual sociology

The photographic capture involved a drive along one road which took me through the northern route through to the southern route. I drove and took pictures for 3km on each route in June 2013. The road does not deviate but as you can see from the aerial images it is quite clear that one area is much more densely populated and less ‘green’ than the other. Indeed in the bottom right hand corner of the first image A1 you can see more trees and greenery, at this point the road curves into the more affluent neighborhoods bordering Ngong Road. Outdoor advertising in this analysis forms two very distinct categories – branded buildings on the Northern route and billboards on the Southern route. There was not one single billboard of any size on the route which goes through the informal settlement of Kawangware.

When presented with this juxtaposition it is difficult not to concur with J E Williamson quoted by Gillian Rose: ‘advertising is one of the most ideological forms in contemporary capitalist societies’ (Williamson, 1978: p11 cited in Rose 2001: p70).

---

6 An additional smaller group of 5 was required as the second group along the northern group had fewer than 8 participants.
7 Class definitions according to Kenya Audience Research Foundation (KARF) Living Standards Measure ‘LSM is a way of segmenting people based on their access to, and use of a wide range of products and services. A composite index is derived from a range of variables (products & services) that sum up the consumption and affordability status (and hence the living standard) of an individual. LSMs are a measure of affluence & development’. In social economic categorization largely used in Europe lower class D and E and middle class C1 http://brandkemistry.wordpress.com/2013/02/05/who-exactly-are-the-kenyan-middle-class/
As ‘noisy’ and partial as this capture is, what it does provide is documentary evidence of the visual landscape surrounding these communities. These images help to provide the context for this discussion and provide an insight into the visualization which is at work.

3 Literature Review and existing research

In trying to establish the parameters of a literature review it is clear from the outset that African visualisation has not been the subject of an extensive amount of academic inquiry. By comparison, the Western visual tradition even beyond art history is so dominant, that the theoretical discussions around how to understand visual landscapes assumes a western perspective as given. This ethnocentric bias though understandable, is not helpful in trying to situate or understand these images. What it does provide are tools and ways of seeing which can be applied to any visual context even if the language and references are not culturally sensitive.

However, literature which supports an understanding of how to use visual methodologies for research purposes such as Gillian Rose’s work, is a useful place to start. This book introduces leading thinkers in the field of visual sociology including the work of Judith Williamson who’s book ‘Decoding Advertisements’ unashamedly identifies the ideological context in which such visual imagery is used in the modern context. Rose’s work also takes forward the exploration of visual language and advertising as a body of imagery to which key theoretical frameworks can be applied in systematic ways. Rose’s approach seeks to situate the mythic nature of advertising and the second order structures which support it, and as a result is able to show how our world view (or at least that of the capitalist consumer societies of the west) is influenced and informed by such perspectives advertising propagates.

The semiological approach (combined with elements from content and discourse analysis and visual sociology) appears to be the most appropriate despite reservations expressed by others and experienced by myself, its linguistic complexity can be alienating rather than illuminating and the template it provides insists on a depth of analysis of images which makes it difficult to generalize across a genre. However, underlying this approach is a key concept which lends itself in particular to the study of the visual – the notion that the meaning of messages is active, not fixed. Stuart Hall’s work in Representation and Gunnar Swanson’s discussion on photographic truth is also highly relevant to this conversation. The work of Lucy Jarosz Constructing the Dark Continent Metaphor as Geographic Representation of Africa Series B Human Geography 1992 (Swedish Society for Geography and Anthropology) provides a helpful background to the ideological context which supports such enduring metaphors about the continent. Given the limited exploration of transnational advertising rhetoric I have chosen to focus on what I believe to be seminal perspectives on visual literacy – Rose, Williamson, Sontag – and resist the cultural bias which often informs their perspective.

The subaltern perspective is unsurprisingly better represented online in blogging and aggregate sites such as Global Voices, Africa is a Country, Compare Afrique, Afrobarometer, Naiforum.org and the Guardian Africa Network. These sites are rapidly becoming the locus for discourse that seeks to provide the insider
perspective and stimulate intellectual inquiry from practitioners, journalists, development professionals and academics. These sites actively dissect and critique contemporary debates about socio-economic issues that affect the continent and provide fresh insights into what Africa Rising and the new African Renaissance mean to people’s actual lived experiences.

4 Methodology

Two distinct approaches have been employed to inform my analysis – visual sociology with a semiotic analysis, focus group discussions and supplementary semi-structured interviews.

4.1 Visual sociology and semiotics

The term ‘visual sociology’ more actively describes the actual capture of the images in this study and the methodological perspective which is brought to bear. Whilst it would be difficult to subject this capture to a rigorous scientific analysis the sociological viewpoint is wholly relevant and applicable to understanding the contextual complexities of the advertising images I wish to focus on:

- Advertising billboards aka outdoor advertising from two different socio economic neighborhoods in Nairobi
- Africa Rising images from the web

Why billboards?

Visual sociology augmented by semiology offers the most insightful method to understand and explain what is at work in advertising images. What more logical way to apply the study of signs than to examine how such a blunt instrument as a billboard ‘communicates’. I chose to look at billboards largely because they are such a feature of the urban landscape of Kenya and Nairobi where I live but also because I would argue they represent a visual endorsement of global capitalism and the brands upon which it confers status. Based on largely Western estimates the average consumer is exposed to one million marketing messages a year. Whilst this exposure would be less in Kenya, the fact that billboards are now such a feature of the visual landscape of its major cities – Marketing Head Dick Omondi refers to them as ‘points of interruption’ (Appendix E1: 62) - would suggest that as a medium it delivers on the key promises of such a platform – proximity to point of sale, high exposure rates, large reach, geographic specificity, impact and awareness.

Gillian Rose talks about ‘the site of visuality’ as being fundamental to the construction of meaning. On my journey through two economically different neighborhoods it is marked how billboards disappear in the poorer area and make an aggressive appearance as we move into the wealthier suburb. I was interested therefore in the site specificity of these billboards and the absence and presence of another form of

---

8 Seth Godin ‘Turning strangers and friends into customers’ quoted in Use and Effectiveness of Billboards retrieved from https://umdrive.memphis.edu/cbrown14/public/Mass%20Comm%20Theory/Week%2011%20Decoding%20the%20Message/billboards.pdf Analysis of effectiveness of billboards and the ubiquitous rise of the medium centres on Western locations and patterns of consumption and largely from an advertiser perspective
‘technology’ based advertising in the informal settlement – that of building branding. De Chernatony and MacDonald in their book ‘Creating Powerful Brands’ neatly explain how the semiotic approach is the perfect tool to help us to understand the myth making which is at the core of all successful brands: ‘people make inferences about others from the brands they own, since some brands act as cultural signs. If marketers are able to identify the rules of meaning that consumers have devised to encode and decode symbolic communication, they can make better use of advertising, design and packaging. Eg, gold has been enshrined in our culture as a symbol of wealth and authority and can convey meanings of luxury, love, importance, warmth and eternity’ (de Chernatony and Mac Donald 1992; p143)

They go on to identify four ‘sign devices’ used by advertisers to market brands: Utilitarian (this thing you are about to purchase is reliable, trustworthy and works); commercial (BMW confers brand value); socio-cultural (notice how many international footballers associate themselves with certain brands) and mythical (Nike and Apple being supreme examples – a mythical lifestyle choice) (de Chernatony and Mac Donald 1992; p144). One could argue that the success or impact of outdoor advertising depends to a greater or lesser extent on its ability to employ any or all of the devices in the right context and to an audience capable of receiving and interpreting these devices.

**Semiotics – deconstructing how things ‘mean’**

Using the tools of signs and codes semiology is an approach to the study of how meaning occurs in different forms of expression. I prefer to think of it as communication deconstructed. How meaning is constructed by the viewer in this case, is parsed through lived experience and culture in the broader context. The viewer is albeit sub-consciously, intrinsically involved in the construction of meaning when faced with a 40 ft high billboard for example.

When looking at the visual component of communications media it makes sense to begin with the foundational model of the sign developed by C S Peirce. Simply put Peirce identified three dimensions of a sign:

**Symbols** have culturally constructed meanings which have developed over time, become habituated and normalized. An example of such a symbol could be language which is shared or traffic signs.

**Index** is a pointer and indicator, something which according to Peirce focuses your attention. An example could be a sunrise, which would indicate the presence of heat and light.

**Icon** resembles what it represents. These icons can have clear similarities or can function as metaphors for the object.

For Peirce an object cannot exist unless there is a sign or ‘representamen’ for it and the ‘interpretant’ or user is what sense is made as a result of the combination of the former (object and sign). He called this process ‘semiosis’ which alludes to the combined nature and mental process of how signs are ingested and understood. The interpretant being exposed to myriad social and cultural influences, allows for change, perspective and altered interpretation of signs.

The codes which are conferred on these signs are socially negotiated at quite a deep level and enable communication when those reading, viewing or experiencing them understand and accept the rules of this
negotiation. What is produced therefore is more than just a one dimensional advertisement or photograph – the object and the interaction with the user adds a further crucial dimension. This process has been referred to as encoding and decoding. What is significant about both of these dimensions is that the semiotic process which occurs allows for a degree of freedom of interpretation between the two, referred to elsewhere a site of semiotic struggle. (Fiske, 1990, p.42-46; Tomaselli, 1996, p.32).

A billboard therefore for one individual simply could be a vehicle for selling a new handwash and for another mean a whole lifestyle choice. De Chernatony and Mac Donald emphasize the cultural dimension influencing meaning: ‘Western culture brands the 07.00 train running ten minutes as ‘the late 07.00’ carrying critical associations of inefficiency. However in less developed economies, the train would be branded as ‘the 07.10, portraying the triumph of mass transportation running against many odds in an under-resourced environment’ (1992: p 148). It could be argued that this cultural take has potentially greater significance and relevance in the context of a country like Kenya which is trying to redefine itself as a middle income nation.

In explaining Saussure's legacy, Stuart Hall neatly illustrates the difference between two elements of a sign – the signifier the photograph or the word and the signified the mental image that we have of that thing. The sign (eg word, oral, visual, clothes, music) in and of itself has no meaning (a sign is ‘a thing plus meaning’ - Williamson, 1978, p 17) it is only in its difference to something else that we are able to establish meaning. I italicize this phrase here as I would argue it has a special referent and component to the ‘othering’ process in particular where Africa or Africans are depicted (Hall 1997: 31). There are other more straightforward ways of looking at the relationship between signifier and signified – such as ‘expression’ and ‘content’ or ‘form and content’. However it is defined it is the relationship between the two component parts of the sign which can be problematized and delivers the space for meaning to occur.

In summary the spaces between what is encoded and decoded, the sign and the signified – the semiotic process – provides rich ground for the cultural components of communication to thrive and is the reason I have chosen this analytical approach. It is the contingent nature of images - their location, who is seeing them, how they are featured, what other elements support their reception, signification and connotation I would argue offer a much more holistic approach to understanding how meaning is produced especially in societies which have non-Western social norms. What this analysis can hope to provide is a more textured and potentially insightful understanding of the roots of visual languages and the anthropological environment which affect them.

4.2 Focus groups

As a qualitative technique, focus groups enable the researcher to obtain insight into an issue in an impressionistic way by observing and documenting the group interaction. Combined with other qualitative methods, the focus group is becoming increasingly a tool for sociological inquiry: ‘a content analysis of the materials from Sociological Abstracts revealed that over 60% of the empirical research using focus groups during the past decade combined them with other research methods’ (Morgan 1993: p130). Morgan stresses the need to understand the method is a tool to collect data. Whilst they have been widely used in many fields from political science to communication studies, it is within the field of marketing that the FGD
has gained most traction. Given that a large segment of this paper explores how images are used in marketing, using FGD’s also has synergy within the research design.

There has been much debate about the ‘ideal’ group size for a focus group discussion. However, Krueger (1988:27) argues that ‘the size must be small enough for everyone to have an opportunity to share insights and yet large enough to provide diversity of perceptions’.

I outsourced the focus group study to a professional researcher who acted as moderator, and his assistant. This had its pros and cons:

**Pros**
- Kiswahili could be used where necessary which allowed conversation to flow more naturally
- The moderator was Kenyan so was able to put people at their ease
- As moderator the researcher employed specific techniques to keep the dynamics of group interaction flowing eg remembering everyone’s name and actively bringing people into conversation who were reserved
- The note-taker supplemented the digital recording of the session with notes of key statements
- The risk of ‘contamination’ by the researcher was reduced
- Recruitment for the groups was undertaken according to rules which govern fair recruitment to avoid people just asking their friends to participate
- The questions were very similar to those asked in normal market research for new products
- This qualitative method revealed more cultural codes and insights into the socio-cultural norms and conventions
- The notes became a form of annotation and allowed me to access key areas of focus by the moderator

**Cons**
- The notetaking was partial – better in some sessions than others and reflected a lack of guidance on my part. Not being able to fully understand Kiswahili meant I relied on the note-taking more.
- Cost of groups was expensive and deterred me from having the fgd’s translated and transcribed. As a result of this it is likely some of the nuances of conversation will have been lost.
- Finding a venue for the groups to take part was very difficult in some places – people are not happy going to the home of someone they do not know
- Whilst the moderator had a question grid and prompt material it is the interaction between participants that often got lost rather than just the answers to specific questions. The note-taker chose to focus on the answers to specific questions rather than the divergent conversation which I would have potentially found useful and illuminating.
- Writing up the fgd’s was not straightforward – qualitative material can be subject to a good degree of interference by the researcher. I was unsure how to categorise the results – key words, themes or take a more holistic approach. The latter would involve transcribing all the material which I could not afford to do.

Within sociological research there is much debate on the ‘coding’ versus ‘moving picture’ approach to interpreting data from fgd’s. Whilst I would not consider using software to analyse data of this kind many researchers point to the fact that deploying a more scientific approach reduces the opportunity to learn from that which is not captured by this method. I am mindful too that such approaches initiate a subtle form of censorship for the researcher, as Laurel Richardson put it *(qualitative writing)* ‘requires writers to silence their own voices and view themselves as contaminants’. Focus groups are essentially structured
conversations which are messy and flawed but also insightful and rich and I would assert Richardson’s view here that a mechanistic approach to social research does not always add value if it is approached in isolation but could alternatively enrich the nature of the observations if we accept the constraints.

4.3 Semi structured interviews

As part of my original project plan I intended to speak to a larger number of marketing directors from Kenyan companies. What I had not appreciated or understood is how jealously guarded such areas of advertising are, and how averse such executives (and even non-executive) professionals are towards sharing their insights with outsiders. As a result I was only able to access two interviewees despite numerous approaches. I did consider using online questionnaires to those who would not grant face to face interviews but the impersonality of such instrument would not have enriched my methodology.

On reflection this perhaps illustrates a naivety on my part and an assumption that such individuals would enjoy sharing their trade insights with someone with an academic rather than media interest. It was only until I managed to obtain the first interview with a marketing manager that I was able to appreciate the potentially controversial or sensitive areas into which I was probing. The value addition of these interviews, though few, combined with the focus group material add a texture and richness to the qualitative analysis. They were both conducted face to face and whilst I acknowledge that formal interviews should observe identified protocols to control for bias, I preferred to lean towards the semi-structured interview style as I felt this was more conducive to conversation. In addition, given that only two interviews were conducted I did not feel it was appropriate to create an interview grid not dissimilar to that which could serve as an online questionnaire. Both interviews were conducted in a more journalistic fashion and engaged what Deacon referred to as a ‘free format’ resulting in ‘an open ended dialogue’ (2007: p 67).

4.4 Reflexive practice

The photographic capture is a flawed but nonetheless useful documentary tool. Having identified the journey I was to undertake it occurred to me how easy it is for a researcher to commit sins of omission and commission in a bid to influence what best fits a premeditated theory, as Sontag neatly puts it, ‘to photograph is to frame and to frame is to chose’ (2003: 46). For example, the researcher can be looking for ways in which advertising reinforces or underlines social difference and as a result ‘sees’ evidence for this everywhere the lens is directed, in every broken pavement or 40m high coca cola billboard. John Berger in his classic text Ways of Seeing (1977) in which he puts the image at the centre of human experience describes it thus: ‘in the act of viewing, we situate ourselves in the image we view, thus taking on a special, perspectival relationship to the things viewed. Perspective [which is not a natural but a cultural phenomenon] makes the single eye the centre of the visible world. Everything converges on to the eye as to the vanishing point of infinity’ (1977: 7). The environment and people I am exposed to, my historical and socio-cultural reference points and relationship to both of these areas will undoubtedly reinforce my world-view or perspective. Of course there is firm evidence that the northern route is considered an informal settlement and the southern route a more affluent middle class area – the housing, infrastructure, transport links, schools, shops etc. However, because it is inevitable that we bring to bear
our own perspective, the word ‘informal settlement’ or ‘slum’ already presents a ready made visual lexicon particularly to those who live in developing countries. If we accept Berger’s assertion that what we see and what we know as an area which can be problematized, then this approach expects and indeed anticipates methodological constraints. However as Berndt Clavier remarked in a recent lecture, ‘if we pursue methodology blindly we will be able to say more and more about fewer and fewer things’. That social reality is mediated is not antithetical to what this paper seeks to explore – the relationship between visual images their communicative nature and the individual.

The use of photography as a medium also presents its own challenges. Deacon describes it as ‘an iconic sign stridently claiming its ‘thereness’ but remarkably silent about its howness’. (2007: 196) Photography’s reductive nature which insists on asserting ‘this is how things are’ the ‘seduction of the apparent realism’ (Swansen 1992) is also problematic when trying to communicate context.

Susan Sontag says that ‘a photograph has only one language’ (2003: 20) and provides the viewer most unequivocally therefore with ‘the credentials of objectivity’ (2003: 26). Credentials she clearly questions and credentials which as a photographer I also have also cause to question. I would argue that the more ethical transparency which can be brought to bear in the process of using photographic images as the foundation for analysis, the less constrained the researcher is by the photograph’s relationship with voracity. Sontag liberates the photographer from orchestrating excessive connotation, ‘the photographer’s intentions do not determine the meaning of the photograph, which will have its own career, blown by whims and loyalties of the diverse communities that have a use for it ‘(2003: 39).

If we accept that how and what is shown influences, albeit in ways we may not be able to identify, meaning, then it is important to understand how the photographs were captured. If one looks at the photographs captured on the Northern route (Appendix B) the perspective is more street level. The images were taken from a slowly moving car (Kawangware is a dense area with poor roads therefore traffic moves slowly). This gives the viewer sufficient distance from the shops and ‘dukas’ or kiosks. The photographic perspective here is more akin to what someone walking on the street would experience.

Talking pictures on the street on foot would draw attention to myself which I would wish to avoid. I also wanted to avoid ethnographic overtones by getting too close. The images I would argue communicate context, and viewed next to each other as shown in the large thumbnails in the appendix, suggest a narrative of their own. However it is fair to say that I selected the images to include in this capture out of several hundreds. Images that were blurred, distorted or unclear were rejected as were images which did not ‘reveal’ anything. Images captured on the Southern route (Appendix B1) were more problematic but reflect the changed circumstances and environmental conditions. Ngong Road is well maintained, wide and fast moving. Given the nature of billboards the images are mainly shown from a distance in order to get some sense of the scale and size. Obviously as I was looking mainly above the main road it is fair to argue that some closer outside advertising images were not captured.

The semi-structured interviews or ‘conversations with a purpose’ (Lindlof 1995: 164 cited in Deacon 2007: 67) I felt achieved their purpose more than any other form of interview may have done in this context. Kenyan’s and Africans in general are people who enjoy interaction, conversation and discussion, all the more so when this occurs in person rather than via an email or impersonal questionnaire. The diversity and richness of use of language, body language, phrasing, intonation would have been lost had I not conducted the interviews in this way. For both interviews I went to the person’s home rather than their
office. I had a list of questions to which I used as a prompt but to which I did not always refer, preferring to let the interviewee feel at ease as they would in a more normal conversation. Employing journalistic techniques to put the interviewee at ease – making lots of eye contact, appearing to be wholly engaged in listening even to areas which were not relevant to the topics I wished to discuss, encouraging the interviewee to feel relaxed in order to elaborate without much prompting – all served my overall purpose. There is no claim to science here, but I felt it was important to adopt this approach in order to maintain conversational and interpersonal rapport with potentially unforthcoming interviewees. It is however difficult to remain emotionally distant from the subject of the interview, and I am aware at certain moments I allowed my own enthusiasms to over-determine the flow of responses. I was lucky that in both cases interviewees were both accomplished public speakers, used to talking about their work and to some extent, flattered to be the subject of such enquiry. I accept however that less forthcoming interviewees could respond quite differently, and potentially with negative consequences, to this approach.

Designing and conducting focus groups is not a task to be taken lightly. Whilst I was inspired, stimulated, surprised and informed as a result of undertaking these groups, my understanding of the complexity of fgd’s as a method is sobering. Earlier I listed the pro’s and con’s but I would wish to go further to reflect on the design stage of the process. The questionnaire (Appendix G) I designed for the moderator, whilst at first glance appears to be robust and all encompassing, was perhaps not the easiest tool for the researcher to work with. Some sections flowed very well and allowed conversation to emerge spontaneously and rapidly. Other sections were clumsy and ill-thought through. I observed the moderator departing from the question format on a number of occasions not just for the purpose of comprehension but also as an attempt to affect the dynamic of the exchange. Of course this then affects any control mechanisms and ability to more accurately compare one group with another, and this is further compounded by the need to conduct 2 of the groups in a different language. The issue with questionnaire formats are reflected here – they can be constraining and limiting - trying to be all things to all people; the questionnaire hijacks the conversation, as Deacon explains ‘structured questioning formats deliver answers only to the questions you ask’ (2007: 73) which may sound obvious but can be detrimental to elaboration. I would also take issue with the notion that what is produced is conversation. Whilst the moderator made it clear at the outset what the aim of the group was the overall contribution to the project of the group was not made clear. Does this matter? Would this affect how people would respond and could it inhibit contributions? Why did I not show the fgd participants the images from Africa Rising? I felt this was potentially too leading. The participants were happy to take part because they were talking about things they could relate to – products, advertising, marketing, what they buy on a day to day basis. As someone pointed out to me, Africa Rising images are not at first glance ‘selling’ anything. This is a construct I have created and for me to inflict this upon the group would run the danger of invalidating the research tool by introducing an element which detracted from the main focus of the group. However I think a separate group allowing participants to explore some of the iconic symbols deployed by Africa Rising may have been an option worth pursuing in isolation.

However it is in the area of culture that I feel this technique is worth exploring and potentially a rich methodological tool for the researcher. Kenyan people are generally very loquacious, active listeners, keen to understand and be understood. Relaxing the necessary formality of the focus group may have allowed this personality to emerge a little more, which in turn may have produced richer feedback. The
artificiality of the format of the questionnaire inflicts itself on the group at some times more than others and whilst this supports the necessary 'scientific' parameters of research, I would argue that it does not allow space for the cultural nuances to emerge. If what social science wants is to present a sociological method that is robust, challenging and replicable then it has to be able to engage with and accept the essentially subjective nature of communication, as something with enriches rather than detracts from this process.
5 Analysis

5.1 ‘Africa may be rising but Africans are not’ - Who is rising and who is left behind

In starting to explore what this phrase means I want to look at the component parts. ‘Rising’ is a surprising word in the context of the continent, a word which for a long time predominantly had the word ‘up’ preceding it when referencing African countries. Economic woes in this post independence context therefore were a given. However, for the past decade a new narrative began to gain traction which seems to be driven largely by economic indicators. The trajectory illustrated above has been described by the chief economist of the Africa Development Bank as ‘unstoppable’⁹. Add a handful of paradigm shifting reports from the Boston Consulting Group, Goldman Sachs, IMF, and the World Bank¹⁰ and the mindset becomes potentially transformational. The notion of an African middle class as the driver of growth has become a powerful weathervane and a ‘fashionable interpretation’ (Pieterse 2002: 190) for economic forecasts and some would argue, an indicator of the extent of ‘Westernisation’ aka progress. Graphs such as the one above have a starting point which begin approximately ten years ago but which also locate growth as a process which ‘began’ at a certain point. Growth is a process through which those on the continent are living through and experiencing.

From emerging markets to a strategy for growth

⁹ Mthuli Ncube http://www.bbc.co.uk/news/world-africa-22847118
Broadly speaking, development thinking has been historically narrowly concerned with articulating growth as a metaphor for progress. Using indices that have currency and validity in the West (arguably the dominant arbiter of such indices), this perspective has tended to ignore the myriad external factors which can contribute to internal change and which are considered in more holistic approaches to development theory. However, the fact that economic indicators and more specifically patterns of consumption are causing the West to pay attention to what is happening on the continent, would suggest the earlier myopic perspective still has validity: ‘there’s enough actual change taking place all over the continent to make the notion (of an African middle class sic) look respectable, and it remains vague enough to accommodate any expectation and get traction across the board’. 11

The ‘Africa’ part of the phrase is a potent and complex factor in a discussion which often gets ignored in preference for more straightforward and tangible fiscal statements. It is the cultural dimension of Africa which I want to look at here. In linking culture with development it is important to remember that one affects the other in a variety of ways. In order to understand the economic development that is being prioritized at the moment we need to understand the cultural lens through which this is being viewed; ‘despite evidence of how misleading it can be, change in African countries continues to be examined through its reflection in Western mirrors’12. As Pieterse’s work on culture in development suggests, culture now figures in development discourse in a variety of ways – as a commodity to be harnessed, as a driver of economic growth and as a sensibility towards the richness of diversity. This might explain how African culture is being harnessed in the visual repertoire used to support ‘Africa Rising’.

The view from the interior

To find the ‘subaltern’ view I turn to Afrobarometer (www.afrobarometer.org), an independent research project made up of social scientists from 31 African countries. Afrobarometer specializes in designing and conducting public attitude surveys across the continent to perform a litmus test of the social, political and economic temperature. They use a standardized set of survey instruments in 35 African countries which are repeated on regular cycles over a long time period. They are used not only to provide in-depth in-country information, but also to act as a yardstick for comparison with other African countries. The surveys they conduct represent 76% of the continent’s population.

I have chosen to focus on this survey not least because it is longitudinal and coordinated from within the continent but also because it measures an important dimension - ‘lived poverty’. This index regularly measures how often people go without basic necessities in any one year. As the authors of the report state: ‘It measures a portion (my italics) of the central core of the concept of poverty that is not well captured by existing measures, and thus offers an important complement to official statistics on poverty and Development’ (Dulani et al 2013: 3). This index offers a more experiential concept of poverty drawn from lived experience (hence the title) and whilst it does not go as far as Amartya Sen’s influential Multidimensional Poverty Index, it is an attempt to assess some of the broader factors that influence poverty levels in Africa. By focussing largely on gross domestic product – an indictor some researchers

11 Jacques Enaudeau for Africa is a Country retrieved from http://m.guardian.co.uk/world/2013/may/03/africa-middle-class-search?INTCMP=SRCH
12 ibid
describe as ‘vulgar’ – the people at the heart of the discussion are othered, essentialised and diminished. The authors of the Afrobaromter report do add a careful caveat - whilst the people they talk to in the survey are best placed to discuss their lives and how having access to basic resources or not affects them, it (the recollection) is often imprecise and vague. However I would argue that this imprecision is a much more sensitive qualitative tool for exploring and reflecting on the human condition in the context of developing countries and reminds the researcher that, as Sen observes, ‘human lives are battered and diminished in all kinds of different ways and the first task seen in this perspective, is to acknowledge that deprivations of very different kinds have to be accommodated within a general overarching framework’ (Cited in Deneulin and Shahani 2009: 29).

Afrobarometer published a report released on October 1st 2013 based on two years of comparative surveys in all the countries it works in on the Continent. The report punctured the bubble of ‘afro-optimism’ with some grim key findings: 20% of Africa’s population often goes without food, clean water, or medical care; 53% rate the state of their country economy as ‘bad’ or ‘very bad’; 44% regularly lack cash income and 76% of people report going without cash at least once in the last year. With just 2 years to reach the Millennium Development Goals, the report concludes that whilst growth is occurring, ‘lived poverty at the grassroots remains little changed… its effects are not trickling down to the poorest citizens in fact, income inequality may be worsening, or alternatively, that actual growth rates may not match up to those being reported’ (2013: 1).

In a follow up policy briefing at the beginning of November the group acknowledge that for ‘Africa Rising’ to be a meaningful concept in the material lives of those it should affect it should not be at the expense of ordinary Africans: ‘Stereotypes about a region or a continent can be difficult to change, even when they contradict measureable indicators, such as GDP growth, but the growing acceptance of the “Africa Rising” narrative represents just such a transformation. Yet to sustain this rising optimism, ordinary Africans must share in the benefits of growth along with those in boardrooms in global capitals. A growing, resurgent Africa should, first and foremost, benefit those that live in it’ (p 2).14

The World Bank’s own bi-annual measurement of issues affecting Africa states that by 2030 the majority of the world’s poor will live in Africa and currently half of its population still lives in extreme poverty. Amongst other things, what these counter arguments illustrate is the gulf in perception between widely used normative development indicators which use measures which are essentially Western constructs, and the lived experience of African people. The tension created by endogenous and exogenous growth is most clearly articulated by Pieterse when he characterises its effect somewhat romantically: ‘the worlds indigenous people are the last custodians of paradises lost to late capitalism, ecological devastation, McDonaldisation and Disneyfication’ (2002:65). In narrowing our focus to the middle class then the masses at the base of the pyramid become opaque.

15 ‘Africa’s Pulse’ Published October 7 2013 available from www.worldbank.org
5.2 Characterising the Kenyan consumer

As this study in part focuses on how Kenyan’s respond to advertising images I thought it was important to understand how the Kenyan consumer is stratified. This instrument though flawed, represents a mechanism to both attract investors and help understand the different needs and what influences those needs and consequent choices at various points along the socio-economic pyramid. Of course it contradicts many of the sentiments I guarded against earlier given that it is a crude tool, but what it does offer is a more holistic approach to social stratification not just that based on income level. Of course in the report by Accenture: The dynamic African Consumer Market Exploring Growth Opportunities in sub-saharan Africa\(^{16}\) (ssA), in which the authors identify the discreet segments that make up the consumer base in ssA, it is important to remember who the target market is for such information. However it does lend some useful parameters for social science research despite being biased towards a consumption focus.

The ideology behind such confidence in African markets is arguably influenced by base of the pyramid perspectives. Professor CK Prahalad was one of the first to try and redefine the poor perspective and arguably has ended up contributing to a new narrative. This narrative sees the poor not just as consumers in the modern sense but resilient, innovative entrepreneurs who have galvanized their circumstances into providing pro-poor solutions from micro-loans to soap products that do not require hot water. Without going into too much detail here, Prahalad’s argument essentially recognised the differentiation which exists within those at the bottom of the pyramid and believes that they too deserved products and services which they could use to improve the quality of their lives. Whilst I take issue with a lot of the pro-poor proselytising associated with this perspective, in particular that market solutions can eradicate or even alleviate extreme poverty, I admire the agency it gives to the poor as resourceful, resilient people not just inert recipients of aid. As it has been critiqued, the base of the pyramid perspective increasingly adopts this agency approach and views the poor as producers not just consumers. Some of this thinking is beginning to penetrate thinking about markets on the continent, but the primary focus remains on consumption patterns as a hook to investors.

Accenture claim ssA, is ‘the last frontier’ for growth, populated by ‘856 million consumers’. The report points to decreasing poverty levels, growing emerging markets, a burgeoning middle class, improving infrastructure and rapid urbanisation all of which can help leverage opportunities for investors. Whilst the picture presented in the report is one of overwhelming confidence, the authors are keen to inform investors that assuming homogeneity in consumption patterns and importing marketing approaches from western markets is unlikely to provide the returns they are looking for.

The report identifies 5 key consumer segments: Basic Survivors, Working Families, Rising Strivers, Cosmopolitan Professionals and The Affluent. These are the images they use in the report to reflect these different socio-economic groups:

![Images of consumers representing different socioeconomic groups]

The ones with a check mark in the picture refer to the Basic Survivors and Rising Strivers descriptions of which closely resemble the core participants of the focus groups conducted for this study.

**Basic Survivors**

According to Accenture the challenge of reaching these Basic Survivors and profitably doing business with them are legion, but because there are so many of them, ‘the size of the opportunity makes this segment worth the effort’ (p 19). The report suggests that this category of people will gradually become more affluent and as such have more money to spend. For investors to seize opportunities to market at these people they need to understand that allegiances to certain brands will already have been formed. It points to companies such as Unilver which have already adapted to suit this market offering low unit products (LUP’s) to those on reduced incomes. LUP’s are available in anything from soap powder, milk, cigarettes, fuel and sold mainly in the small ‘dukas’ (kiosks) of which there are many in Kenya particularly in the informal settlements. 

Basic Survivors are the base of the pyramid: ‘whilst ssA consumers’ upward mobility is what attracts attention, at present Africa's largest segment is also its poorest.’ They make up over half of ssA population, live on less than $2.5 per day and are cash-based, spending money on basic essentials from market and street stalls. These people would be characteristic of the focus groups which took place on the Northern route.

**Rising Strivers**

The segment most akin to the focus group individuals on the Southern route would fit the Accenture description of ‘Rising Strivers’. These are people who have access to credit facilities, can afford to shop in supermarkets, ‘value upward mobility as well as intangible brand qualities’. They are approximately 10 – 16% of the population of ssA and have surplus income once their basic needs are met, to save and buy consumer goods. For this organization they are the prime movers behind the growing middle class segment and ‘represent a dichotomy between Africa’s past and future’. (p23) Dick Omondi Brand and Communications Manager for Airtel Kenya recognized this group at ‘Aspirational Followers’ who form their target consumer, ‘we don’t talk to them directly because if we did their aspiration would drop to the floor’ (Appendix E1: 61)
A word on VALS

Market segmentation such as that described above is nothing new. VALS which stands for ‘Values, Attitudes and Lifestyles’ is a widely used research tool to help commercial companies target their products and services to the sectors of society most likely to respond. Created by a social scientist, this methodology has become the standard framework in particular in the US to categorise types of consumer. It is mentioned here because the categories it identifies share some of the characteristics described in the Accenture report. Of the two segments I have focused on for my study – The Survivors identified by VALS are described as ‘people who live narrowly focused lives because they have too few resources to cope’. With reference to their consumption habits they demonstrate keen brand loyalty ‘especially if they can purchase them at a discount’; The Strivers are described as people ‘who see themselves having a job rather than a career…they are as impulsive as their financial circumstance will allow’. 17

5.3 Primary research into advertising impact

Five focus group discussions were conducted – three on the Southern Route and two on the Northern Route. The aim of the groups was to elicit information and insights into brand awareness and advertising exposure, in particular those which were represented in billboard or outdoor format. A summary of the key responses from these groups is attached (Appendix C).

The first thing to observe about these two very different socio-economic groups, the rising strivers and basic survivors, is that their immediate visual contexts are very different.

Our rising strivers live in an area which is replete with billboard images of consumer culture as those in Appendix B1. Our basic survivors live in an area where outdoor advertising takes on a totally different form – entire buildings are painted and branded. The building itself therefore functions as a ready-made billboard (Appendix B). Tourists who drive though Kenya and take pictures of the quaint ways of the locals who take pride in their shabby ‘dukas’ by emblazoning them with coca cola or safaricom, are not aware that for the cost of a tin of watered down paint, global brands are essentially insinuating themselves into the lives and consciousness of local residents. All of these buildings can be seen from the main road which cuts through the Northern route. Having been into several informal settlements I can confirm that the further one moves away from the main thoroughfares, the less likely you are to find ‘branded’ dukas even though the foot traffic is probably still quite high. In casual conversation with several duka owners in the area of Nairobi I live in, two spoke of promises of material compensation in return for this branding ‘facelift’, which never materialized18. Omondi confirmed that Airtel paint buildings in the informal settlements to create what he referred to as ‘brand presence’ but insisted it has more to do with creating front of mind awareness than any sinister subliminal purposes.

17 VALS was developed by Strategic Business Insight by social scientist Arnold Mitchell who identified 8 psychological types of consumer http://www.strategicbusinessinsights.com
18 This kind of ‘facelift’ branding is discussed in more detail by Sarah Bently in The Ecologist article ‘Top global brands accused of controversial ‘painted home’ adverts in Africa http://www.theecologist.org/News/news_analysis/1335019/top_global_brands_accused_over_controversial_painted_home_adverts_in_africa.html
Amongst the basic survivors, essential items such as milk, sugar, flour, cooking oil, water, bread, fuel and washing powder comprised their usual purchases. Both of these groups shopped at the local kiosks and whilst there is a choice of brands albeit limited at such kiosks, the ones they chose tended to be those brands which benefit from heavy advertising on buildings. However, when presented with a number of choices from Unilever low unit products (LUP’s) and other competitors in the market, overall the price of the product dictated the decision to purchase. ‘Parity products’ such as everyday items like soap and washing powder where there are many brands in the market, have much work to do to get the consumer to make the choices in their direction. Unilever is not the only company selling LUP’s but it can afford to undercut its market rivals and has a very strong presence in the lives of basic survivors. Caroline Muchina, marketing manager for CFC Stanbic Bank in Kenya believes there are two main factors which dictate choice for our basic survivors: ‘That market segment is price sensitive and they don’t have a lot of money for choices, they only use what has worked for them. Also quality – ‘I believe in this and it’s worked for me and for my neighbor’. (Extract from interview Appendix E: 57)

How does advertising make an impact on this group? If we look at the duka branding along this route, several brands stand out: Safaricom (local mobile phone network), Coca Cola, Airtel, Omo, Mpesa (mobile money), Tusker (beer). Most of the other outdoor advertisements are for generic products such as seed, flour, cooking gas. In focus group 2 comprising of basic survivors over 35 years of age, when asked what would affect their decision to buy a new product they referred to three things – the taste (or efficacy), the price and the advertisement. They appeared to ‘believe’ what the advertisement is saying particularly when it came to soap brands or popular food items such as Royco seasoning. One person described the detergent Ariel as ‘Ariel washes whiter’ as if this was in fact the product’s name. Members of this group seemed to have a very straightforward understanding of the role of advertisements which they believed is essentially to create awareness and encourage the potential consumer to ‘want to know more’ about the product. In their home area they referred to advertisements they could recall for baby diapers, oyo (food seasoning), safaricom, airtel (mobile phone company) and coca cola. The only billboard they could recall was not in their area and was for coca cola. Whilst one could infer that the relationship between advertisements and the target populations in these groups are delivering the encoded ‘preferred meaning’, it also has the affect of encouraging desire which is an unintended ‘reading’. Two respondents from this group when asked when they see advertisements elsewhere for products they cannot afford, responded: ‘I feel bad but I know I will buy it if I get the money’ and, ‘It makes me work hard to earn money to buy it’.

When presented with two images of outdoor advertisements for Sky Vodka and a housing development there appeared to be a fairly unequivocal response: ‘these are for the rich’. One respondent of this group appeared to resent being shown logo’s for high value brands insisting the moderator ‘should not bring (show) adverts for Sarova or Emirates, they are meant for rich people’. Many people in this group struggled to identify these brands (See Appendix D) yet nonetheless some were aware of their intrinsic high value status. In focus groups 3 – 5 all groups could identify most of the brands associated with the logos.

Marketing Manager Caroline Muchina targets banking products to three specific socio economic groups – the rising strivers, the professional and the affluent, although she does have products for those who form the base of the pyramid, these are not clients that resonate with her bank. However she was very clear about what methods she would use to engage these clients: ‘People connect with radio so much because
its very interactive because they have no problem calling Citizen (*popular local radio station*) and talking about banking services. Radio you win, forget about print, ill struggle with outdoor but I can do a bit of tv because even in the slums they probably have a tv somewhere where people go to watch but mostly its going to be radio and then activations – I will have a truck go to their places’ (Appendix E: 57). The latter ‘truck’ she refers to is a platform used widely in many African countries known as experiential marketing. A large truck travels from town to town and even to smaller villages promoting particular products – entertainment in the form of music, dance and sketches are combined with information about the product and giveaways of free samples. Interestingly when shown the pictures for coca cola (Appendix F) and asked which of the product range they are likely to buy, the majority of respondents from both of the basic survivor groups mentioned that the small 300ml plastic bottle was preferred because it was affordable but also its re-cycle value – as a container for paraffin and as a water bottle when travelling. They were most likely to learn about this product from tv, radio, ‘drawn on shops’ (duka branding) and billboards, although none of the group members could explain what the ‘coke zero’ product was. One could infer that the more ubiquitous regular coca cola is aimed at this group while coke zero is aimed at the more health conscious client. Coke Zero is not sold is the same small LUP sizes as regular coke nor is it found at dukas. It is clear then that this more direct form of advertising speaks more clearly to the basic survivor whose relationship to consumption is based more on need rather than desire.

The rising strivers in focus groups 3,4 and 5 more closely resemble the core market for CFC Stanbic albeit at the lower end of the earning scale. These people live in and around the Southern route and are exposed to a high concentration of outdoor advertising. This group shop largely in supermarkets (although still use outdoor markets), have access to credit facilities and enough disposable income to be able to purchase non-necessities such as alcohol and toiletries. The people in these groups demonstrated increased brand awareness and understanding of marketing techniques for example, when asked why they would choose one brand over another of the same product (food seasoning) the response was ‘because the alternatives are not superbrands’. One participant felt that advertisements are used for creating awareness but those that are frequently repeated send a message that the product is failing to engage in the market. There was an increasing diversity of views and awareness of the role of advertising in the lives of the rising strivers. Opinion ranged from ‘ads give me options’ to ‘I am so used to seeing ads I don’t pay attention to them’. This group had more understanding of the encoding at work and decoded images in very different ways from the basic survivors. They could identify most of the high value brand logos but still associated the Sky Vodka advertisement and the housing development adverts as targeted at ‘people on a real income’ and ‘young professionals’ – their aspirational market segment. This awareness concurs with Muchina’s observations that the lower and middle class consumers she targets are demonstrating an increased sophistication when it comes to visual awareness. When she considers what images to use when designing her campaigns for those who earn significantly less than $1000 per month she has to be particularly mindful not to communicate elitism.
This image she provided as an example of the kind of woman person she would use to target this client group although she would not use this at the coast as she maintains the woman looks too metropolitan. According to Muchini this woman ‘looks Kenyan’, she has the right shade of skin colour, her hair is processed which implies status and is the right length. Muchini largely uses library images to support her marketing campaigns but when targeting lower income groups she will generally do a photographic shoot – it being difficult to find images in photographic libraries which are not too ‘national geographic’ and to which people can relate. It is unlikely this banking brand would cast someone with natural hair in an outdoor advertisement as these platforms mainly target their corporate and private clients as the following extract illustrates:

**Would you cast someone with natural hair in a cfc advert?**

Yes I would.

**To target your corporate clients?**

No, no, no, no, no. Right now natural hair is in, so if I cast someone it would be to target the 27 – 32 year olds because now they understand it, my mother would be ‘why is her hair so unkempt’? I have no problem with like slightly shaggy hair but the woman would be in a suit dressed up going to work. Younger people would think ‘she’s lost it’.

Conversely Muchini describes an advertisement she was involved with for a UN agency where they had to show the diversity of the continent in its people: ‘we couldn’t use one African. We could use one white person but we had to show the diversity of Africa – one would be in a suit and one would be in a traditional dress’. Omondi from Airtel says focus groups they use to market test new products are very sensitive to detail and can identify even highly nuanced distinctions, ‘tribal issues definitely, they are looking for an average Kenyan. What are they wearing, is it too bourgeois?’ (Appendix E1: 63).

---

19 Ad for self service banking which illustrates the point, retrieved from [http://www.cfcstanbicbank.co.ke/Kenya/Personal/Self-service-banking](http://www.cfcstanbicbank.co.ke/Kenya/Personal/Self-service-banking)
Clearly the visual rhetoric at work in these images belies the argument that pictures cannot be discursive. The relationship between the intended audiences and the messages which are encoded in these billboards are significantly affected by location, situatedness and exposure. One could argue that the reason why the rising strivers had more considered responses to billboards is due to their level of exposure and engagement with this form of visual media. The basic strivers, exposed as they are to images painted onto buildings have less ‘argument’ with this form of advertising because these images literally form the fabric of their homes, shops, schools and communities.
5.4 Ways of seeing: Semiotic analysis of Africa Rising images and billboards

Here are the images from the first page of a Google image search of 315,000,000 referencing ‘Africa Rising’ on 20th October 2013:

Fig 1
What are the component parts or signs of the Africa Rising images?

A straightforward glance at the 21 images reveals the following:

- 3 images show African faces
- 13 depictions of the shape of the continent
- 4 images of acacia trees – a species often seen on African plains
- Two images feature animals (bird and lion)
- One image has an urban landscape
- Seven images depict sunrise or sunset
- Primary colours (red, blue, yellow) feature in all of the graphic images

The form which the **sign** (‘Africa’) takes, the **signifier** in the many of these Africa Rising images is the African continent:

![Africa Map](image)

The concept or **signified** (‘rising’) according to Saussure of this signifier, used in the context of *Africa Rising* on book jackets, websites and magazine articles is that the continent is growing, moving forward making progress. The relationship between the image above and that which is signified is referred to as the **signification**. In these images above there are other signifiers which I believe contribute to this signification:

- The colour palette – yellows, oranges, earthy colours, primary colours, blue skies, colours associated with the sun or which become amplified as a result of being sun-kissed
- The presence of black African faces
- Animals and other objects in nature
- Large skies
- Multitudes
- The presence of the sun symbol

There are other more straightforward ways of looking at the relationship between signifier and signified – such as ‘expression’ and ‘content’ or ‘form and content’. However it is defined it is the relationship between the two component parts of the sign which can be
problematized. It is helpful to look at how the semiotician Peirce referred to this as an ‘index’ or cultural specificity which in turn supports the meaning.

Gillian Dyer (cited in Rose 2001: p 75) created an interesting checklist for analyzing the signs of humans in advertising. To apply this approach to the signifiers in these images I would propose another checklist exploring the sign of Africa and the visual image such as that depicted above:

- **Whole**: The continent is very often depicted in its entirety not the 49+ countries it is comprised of; ‘out of many, one’ – the cradle of humanity;
- **Black**: homogeneity of geography, people, politics, expression; darkness, dense, impenetrable, mysterious, unknown, other
- **Sun**: sunrise and sunset – both suggesting the beginning or end of an era. A new dawn alluding to renewal, rebirth and a break with the past. Subject to nature; physically hot; politically hot – volatile; as it relates to Christianity and the missionary influence of ‘good news’
- **The African**: African faces combined with the shape are culturally profound
  - spectacle wearing intellectuals, Pan Africanists or revolutionaries
  - The African Mother – long suffering, hard working, symbolic of the strength and endurance of the continent; knowing
  - ‘natives’ toiling in heat, wearing little clothing
  - en masse
  - proud, dignified, afrocentric
- **Potent**: filled with colour, diversity, animals, immensity and extremes; ethnographic richness; authentic
- **Landscape**: expansive, large skies, wild, vast, wild (primitive?), ancient, unchanging, heritage

The visual component of signs, what Peirce would refer to as ‘iconical’ signs are the subject of rhetorical analysis. There is much debate in this approach about whether visual rhetorical analysis has foundation. Aristotle describes rhetoric as ‘the faculty wherein one discovers the available means of persuasion in any case whatsoever’ (cited in Scott & Batra 2003; p 19). This articulates for me the importance of visual representation and the

---

20 According to Williamson ‘colour tells a story’ and this story imbues any words associated with the image with greater meaning and validity (1978: p 20)
need for that function to communicate to the viewer a shared system of understanding. What is so valuable about this approach to deconstructing advertising images is expressed very neatly here: ‘how something is shown is as important as what is shown’ (Scott & Batra 2003; p 21). This approach firmly believes that images communicate and are capable of being ‘discursive’ and argumentative in ways which are possibly more nuanced and sophisticated than language. This communication is rooted squarely in culture in the same way as language. An example used to illustrate this point in advertising is the images used to show the audience the relative merits of one detergent product over another. Images of stains and the effective removal by the detergent being promoted works as a powerful visual argument which connects whiteness with goodness and cleanliness with right. The overwhelmingly social and mediated nature of visual languages provide a fair degree of wiggle room for meaning. Signs are our anchors in a sea of meaning, the commonality of which gives us access to a shared language. Rhetorical meanings are flexible, changing and depend on a relationship established between the communicator and the audience. Keith Kenney and Linda Scott in a review of the literature on this approach argue that the ‘rhetorical intention’ is the foundation of imagery. All images therefore are culturally loaded with significance for the viewer depending on their ‘situatedness’ or a priori knowledge or experience:

‘If there is no one image of ‘cat,’ but always many potential images, all of which are strictly dependent for their communicative power on the viewer’s prior experience with pictures of cats (and not some deeper structure of language), then the statement’s persuasive impact (or failure) is utterly situated in a particular moment and audience’. (Kenney & Scott 2003: p22)

How images work on their own or when combined with text as in Africa Rising, illustrates how useful this kind of approach is for understanding how rhetorical motif’s become so persuasive and ubiquitous. Sonia Foss articulates the case for the visual rhetoric: ‘To qualify as visual rhetoric, an image must go beyond serving as a sign, however, and be symbolic, with that image only indirectly connected to its referent’ (Smith K L, Moriarty S, Kenney K, Barbatsis G, Eds 2005: p141) and the ultimate goal of this approach is to understand the ‘communicative dimensions of images through attention to their nature, function, or evaluation’ (2005: p150).
As part of this study I captured images of advertising billboards on a particular stretch of road. This road was chosen as it cuts through two very different neighborhoods – an informal settlement and a middle class suburb. These are some of the hundreds of billboard advertisements which lined the route of the road as it dissected the middle class suburb:

Fig 2
At a glance observations about these images - what does the audience see:

- **Size**: many billboards are immense and dwarf the traffic
- **People**: many include faces in close up, groups of individuals or ‘families’
- **Product**: almost all refer to a product rather than a service
- **Local**: many highlight Kenyan brands using what advertisers would refer to as ‘culturally appropriate’ signs
- **Gendered**: women significantly outnumber men (of the hundreds of images captured of that route no images show a man alone)
- **Tradition**: aka authenticity

Gillian Dyer talks about the particular qualities humans in advertisements transfer onto the product in question. These include hair, race, gender, passivity or activity, ‘props’ which have cultural significance, facial expressions, hair-style, dress and attire, pose. The people in Fig 2 appear firstly to be all African (Samsung being the exception) and largely female. The gendered bias perhaps connects to the domestic nature of some of the products in Fig 2 – soap and tea for example – but I feel also connects with a potent mythology of ‘the African mother’. An interesting dimension to these women is their hair. Dyer suggests is used to ‘signify seductive beauty’ but in the Kenyan context hair which has a more European texture would also have a class association – either the person is mixed race or has the means to expensively process her hair. The woman in the Visa advertisement would not be the same woman used in an advertisement that wanted to convey tradition or ‘African-ness’.

The second picture in Fig 2 featuring a woman widely smiling is for teeth whitening chewing gum. Note the hair. A woman of this sort is more likely to be associated with the ‘luxury’ nature of the product her smile advertises. Kenyans who earn less than $2.5 a day would not consider a purchase of gum an essential. Williamson in Decoding Advertisements talks about how advertisers ‘transfer’ the social value of their products by creating particular associations and signifieds which mean something to the consumers they target. In the Kenyan context they are different
and specific but relational to their Western equivalents.

It makes sense to go back to C S Peirce’s model of the sign here\textsuperscript{21} which is often deployed when looking at the visual component of communications media. Simply put Peirce identified three dimensions of a sign:

**Symbols** have culturally constructed meanings which have developed over time, become habituated and become normalized. An example of such a symbol could be language which is shared or traffic signs.

**Index** is a pointer and indicator something which according to Peirce focuses your attention. An example could be a sunrise, which would indicate the presence of heat.

**Icon** resembles what it represents. These icons can have clear similarities or can function as metaphors for the object.

For Peirce an object cannot exists unless there is a sign for it and the interpretant is what sense is made as a result of the combination of the former. He called this process ‘semiosis’ which alludes to the combined nature of how signs are ingested and understood. If we applied this interpretation to Africa Rising images we might get the following:

Africa Rising (SIGN) + the physical shape of the continent (OBJECT) + any combination of sunrise and golden hues = progress (INTERPRETANT)

In many of the billboards on the southern route certain indexical motifs of Africa Rising appear to be deployed which are familiar:

- **Symbols** – Swahili and English language and evocative words such as ‘believe’, ‘magical’, ‘ushinde’ (win), ‘discover’, ‘premium’
- **Index** – presence of ‘sunrise’ (physically depicted and graphically); wide skies;
- **Icons** – of the 11 ads in Fig 2 10 contain ‘families’ or faces; cars, masaai, money, coca cola, traditional elements, shape of the continent, animals, colours of the Kenyan flag (red, black, green); credit card, alcohol

---

\textsuperscript{21} University of Chicago glossary of semiotics retrieved from http://csmt.uchicago.edu/glossary2004/symbolindexicon.htm
At first glance one could argue that the ‘rising’ images more closely connect with the building branding associated with the visual environment of the lower socio economic groups if only through their use of warm colours. However, whilst they use a brighter colour palette (orangey/sunset/sunrise) which we can see reflected in the oranges and reds on the northern route, it is the consistency of this motif which resonates with how colour is used in the billboards. The billboards in this study effectively have the same colour hues at work – blues, steely greys, cool greens, white (see Appendix B1 for thumbnails of the images along 3km of the southern route). Colour is used randomly and chaotically on the northern route and it is hard to distinguish a pattern or formality. Why does this matter? Williamson cited in Rose talks about the formal mechanisms of advertisements which together communicate signifieds. These include captions, graphics, photographs, framing techniques of the product being sold and use of colour: ‘the use of similar colours in different signs in an advert work to connect those signs…between the product and an object, that product and the world, or the whole world might be retinted in the product’s colours’ (2001: 84). In a chapter in Batra (2003: 313) entitled ‘Colour as a tool for visual persuasion’, Garber and Hyatt argue that colour works on consumers both at a cognitive and emotional or sensory level. They argue that the cognitive associations are deeper and more fundamental to how we interpret visual stimulus particularly in advertisements. In the commercial world of advertising colour has a unique ability to communicate associative meaning. In Kenya for example I would argue that three primary colours have very strong brand equity for Safaricom and its mobile money product Mpesa (green), Coca Cola (red) and Tusker (yellow). The associative meaning of the Africa Rising images would depend on the consistent deployment of a certain colour palette and particular hues and an understanding of the emotional connection people have with those colours in the context in which they are used. ‘Brand Africa’ I suggest would wish to pursue its association with certain colours in such a way that Pepsi would wish to associate itself with the colour blue or Coca Cola with the colour red.
5.5 Codes

As a dimension to the methodological approach to the study of billboards, it is relevant to understand the concept of codes, denotation and connotation. Connotation and coding specifically refer to a second order of signification as Barthes would describe it, which works at a more subjective, personal level. What a billboard denotes is pretty much what the viewer sees – its physicality, the products in the images, the photograph, the smiling faces, the white teeth, the happy family in the comfortable saloon etc. The connotation is what the viewer applies drawing on his or her own lived experience or perspective and which engages the mythic nature of signs. This allows us to understand what is at work when presented with an advertisement for a soap detergent which ‘washes whiter than white’. The connotation around whiteness engages a whole new order of meaning: cleanliness, that which is unblemished, sanitary conditions, high standards, light, truth, honesty. As Deacon (2007) argues, signs require these culturally derived codes to operate as ‘interpretive devices…a systemized cluster of context-specific meaning, which enable communication to occur within cultures’ (Deacon 2007: p145). Of course many of these codes are cross-cultural and transcend the usual barriers of norms and conventions specific to societies. In a pre-interview, Dick Omondi Head of Brand and Communication for Airtel Kenya spoke about how the increasing transnational nature of brands requires sensitivity to deeply held cultural codes. The example he gave was when the national airline of Kenya KQ began a partnership with Dutch Airline KLM. To advertised its ‘dawn to dusk’ schedule the advertising agency for KLM suggested the use of a cockerel and an owl. In many African countries the owl is a feared and loathed bird and its presence or ‘hoot’ would spell disaster. To associate this with an airline is possibly the worst visual symbol imaginable for Kenyans whilst to the Dutch the owl simply represented a wise creature of the night.
Another dimension of coding which was useful to understand in this analysis was the non-linear nature of the process between what is encoded by a media text and what is decoded by the consumer. That there is much room for inference, vagueness and sometimes miscommunication not only points to how sophisticated and thoughtful these kind of media images are but also the notion that there are parameters of ‘reading’ at work. Stuart Hall called this the ‘preferred reading’ which acknowledges that communication codes have boundaries but have subtle mechanisms for ‘exerting pressure on the decoder’ to nudge them towards connotative understanding that meets the encoder’s intentions.

### EXTERIOR (cross-cultural) CODES

<table>
<thead>
<tr>
<th>Component</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Luxury items</td>
<td>wealth and status</td>
</tr>
<tr>
<td>Credit cards</td>
<td>lifestyle, carefree, choice</td>
</tr>
<tr>
<td>Alcohol</td>
<td>sophistication, taste, discerning</td>
</tr>
<tr>
<td>White families</td>
<td>citadel of ‘the family ideal’, happiness, home, the foundational unit of society</td>
</tr>
<tr>
<td>Slim white women</td>
<td>archetypal femininity and grace, sophistication, ideal of beauty</td>
</tr>
<tr>
<td>Animals</td>
<td>power, untamed, nature, raw</td>
</tr>
<tr>
<td>Fast food</td>
<td>convenience, negative class associations, low quality</td>
</tr>
</tbody>
</table>

### INTERIOR CODES

<table>
<thead>
<tr>
<th>Component</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Straight hair</td>
<td>middle class</td>
</tr>
<tr>
<td>Food</td>
<td>more than one meal per day</td>
</tr>
<tr>
<td>Alcohol</td>
<td>unnecessary, anti religious</td>
</tr>
<tr>
<td>Mobile phones</td>
<td>as a status symbol rather than functional</td>
</tr>
<tr>
<td>TV, hi-fi, fridge freezer</td>
<td>electricity in the home</td>
</tr>
<tr>
<td>International banks</td>
<td>high fees</td>
</tr>
<tr>
<td>Fast food</td>
<td>disposable income, non-traditional Kenyan, western, 'exposed', urban, sophistication</td>
</tr>
</tbody>
</table>
The iconical signs of Africa have emerged over a number of years but, I would argue, have reached the level of conventionality required to translate. Products which are specifically targeted at the rising strivers demonstrate a strong emotional connection to the Africa Rising images I would argue as they are also more closely aligned to the broader aims of the economic narrative this supports. Kenyan brands and those driving the ‘rising’ narrative employ these icons judiciously. That which is signified by this potent sign of the continent is currently being manipulated and transformed into a new interpretant in Kenya and across the continent. Omondi introduced the notion that ‘heritage’ is now playing a significant part in the visual narrative of advertising in Kenya.

Dick Omondi identifies a rural urban dimension to Kenyan society - ‘one foot is here in the city and one foot is in the village’. As a result, images which employ ‘heritage’ signifiers have the ability to create powerful emotional connections for Kenyans. He describes a campaign he worked on for Tusker beer for East African Breweries – ‘Kenyans are very aspirational to the West but they are also very proud of the things which make them Kenyans. We tested the Tusker advert on Kenyans in London and many of them cried. My country is so strong in me’.

How successful this rebranding exercise becomes remains to be seen. De-linking or manipulating metaphors and creating new ones is the business of advertisers around the world. It could be argued that to alter the regime of representation associated with Africa is unlikely given the enduring, compelling and deep mythological structures which underpin it, what Roland Barthes describes as the ‘meta-language’. Buying the metaphor of the continent rising as opposed to being ‘hopeless’ is a difficult ask given the enduring and historically fixed and complex nature of Africa.
signifiers. However, what we see in these advertisements is a visual rhetoric that borrows from familiar themes, icons and symbols and aims to represent them differently in a more positive perspective. Hall refers to this process as a ‘trans-coding’ strategy (2011: p 270). Ultimately I would argue the aim is an economic rather than a cultural one, to create traction around the notion of an African middle class to perpetuate the ambitions of global capitalism. Using an approach based in culture is interesting because it offers some insight into political economy of the Continent and its consumers but it nonetheless gravitates towards a Western notion of change whether it be finance capital or private sector development. Whether this is a another example of a ‘grand cohesiveness’ (Pieterse 2002: 37) in development thinking or simply a tangent, it is clear that these kinds of ‘totalising paradigms’ offer little in the way safety nets for those who do not get with the modernity programme.

**Conclusion**

The purpose of this study was to deconstruct the use of the term ‘Africa Rising’ with a particular emphasis on the use of imagery. The hypothesis asserts that Africa Rising imagery deploys similar techniques used by mass-market outdoor billboard advertising to communicate its message of prosperity, growth and development. However, because of the way they are encoded, these billboards ‘speak’ to a narrow socio-economic sector of Kenyan society, as Africa Rising uses the same approach and techniques, then those at the base of the pyramid are automatically excluded from this conversation.

What emerges from this study is an insight into how Africa Rising is demonstrating the use of powerful signifiers which draw on an established repertoire of images which target and offer preferred readings to a group of people here referred to as ‘rising strivers’. In this study these people live mainly along the Southern Route and are exposed to substantial amounts of outdoor advertising and mass market imagery. Along the Northern Route the ‘basic survivors’ constitute a much larger group. These people are required to engage in necessary patterns of consumption but their social and political realities are not reflected in the renaissance agenda or discourse. It is widely accepted and understood that advertisers encode messages
on one level and myths on another which allow for decoding by target groups to take place. Those at the base of the pyramid are not targeted by advertisers in the same way and arguably, by those promoting the ‘rising’ agenda, and therefore they do not possess the necessary tools with which to decode the ‘offer’. Basic survivors who make up the majority of Kenyans are more readily engaged in the corporeality of subsistence and are therefore unlikely to afford the luxury of aspiration.

In maintaining a narrow focus on economic growth and other more exogenous instruments for measuring development, the afro-optimists are ignoring key components of what amounts to human development in Kenya. This could be a result of the tendency Pieterse identified as homogeneity around development discourse and a move towards ‘general recipes’ (2002: 37). Whatever the reason, the debate about growth must reflect the view from the interior, what Pieterse described as ‘the diversity of development circumstances’ (2002: 52) which offers a more holistic understanding of the complexity of poverty and which qualitatively measures actual lived experience over time. Whilst this paper has not attempted to explore the myriad economic arguments for African-led development, it does indicate the need for development to include measures that offer potentially transformative change and not just focus on how many Kenyans own mobile phones, have access to Twitter or achieve coveted middle class status.

One of the limitations of this study is the inability to be able to screen for other exposure to mass-market advertising. Indeed participants in the focus groups did talk about advertisements they had seen or heard on other media. It is not wise therefore to extrapolate too far given the inherently social nature of that which is being studied. However I would argue that the visual landscape in which these two communities are situated underlines the culture based nature of the production of images and reminds us ‘how something is shown is as important as what is shown’ (Scott & Batra 2003: 20). The rhetorical intention underlying images insists that a critical audience must ask why and how we are being shown what we are being shown, and this is as important in highly visually literate societies as it is in an informal settlement in Kenya. The visual landscape experienced by the basic survivors has an influential rhetorical intention which arguably locks them into patterns of consumption which are relatively fixed. The fact that buildings are
branded by consumer products and the people in these communities have limited exposure to billboard advertising, is an area which deserves more study as I believe it could shed light on the complexities and influences which affect the economic landscape for people who, at face value, have limited choices. It could be argued that the big brands like Unilever and Coca Cola who market their products using LUP’s have more sensitivity to the pressure of life at the base of the pyramid than those who design sophisticated projects with a view to affecting development outcomes. What it demonstrates is the need to understand how culture operates within development as Pieterse referred to as ‘a terrain of power’ (2002: 65) and as a vehicle for ideology.

The fact that Africa and in particular countries like Kenya through its home grown brands are also engaging in this collective visual volte face would suggest that this is an outcome of a confidence certainly, but also a desire for Africa to be the architect of its own post-colonial identity now that it appears to have the economic means to do so. Omondi talks about the ‘glocal mentality’ transnational companies like his need to deploy if they are to speak to their consumers in a language they understand. This would appear to be born out by the fact that some of the most successful brands in Kenya are all local products: ‘Safaricom, Mpesa, Keringet, Royco, Kenyol, Ketepa, Tusker, all the resonating names that are working well for Kenya are things that people can relate to, they have rhyme with the people of the culture’ (Appendix E1: 66).

If we accept how transference claims to work in advertisements then the aspirational class in Kenya is already on board with Africa Rising and the ideological take home is simply reinforced through images that resonate on 40ft high billboards - ‘accessible ideologies’ (Williamson) thriving in the Kenyan landscape.
Kenya celebrates 50 years of independence and self-determination with a little help from the continent’s most ubiquitous brand

ENDS
References


APPENDIX A NORTHERN ROUTE (KAWANGWARE, WANYEE)

Route of photographic capture
APPENDIX A1 SOUTHERN ROUTE (NGONG ROAD, JAMHURI, KENYATTA FLATS)
APPENDIX B NORTHERN ROUTE
PLACE TICKS BESIDE EACH LOGO ACCORDING TO NUMBER OF TIMES RECOGNISED

APPENDIX D

APPENDIX E
Describe your job?
I create awareness about our products and services. Right now just in Kenya. We are part of standard bank group but in Kenya we are separate. We have stanbic in Uganda and TZ every country operates on it’s own so I do my own advertising here. The marketing manager (from Uganda) cannot do anything for me here unless, the corporate banking arm we do a deal for East Africa we will do a common ad but other retail products I control the marketing alone.

Are the products you sell in Kenya different from the ones you might sell in Uganda?
Yes.

So that’s the rationale for having separate marketing arms?
Yes

So describe to me a typical customer? Who is your target market for your advertising spend?
First in the bank we have corporate and retail side. The corporate side deals with corporate such as Kenya Airways or Kenya Power then the retail side we have personal markets and business banking.
I do marketing for the retail side, personal and business banking.

And who is a typical customer?
As CFC Stanbic bank we target middle to upper market.

Where does middle start? How much do you have to be earning to be classed as middle?
We have products for people who earn as little as 30k every month, we have a product for them but that is not the target market so if you walked into the branch we would provide a target for them but we would not go shouting to them. Where we focus on I people earning 150k or above and even then we have categories we have 150k – 450k who we call the executive banker who is the emerging middle class. Then we have 450 and above and that is private banking and then we have private clients who has to have $1m bankable assets. There are very few?

Where is the bulk of your customer base?
Between the 150 and 450.
What do those people have?
The 450 guy is senior batchelor or got married, young family, definitely has a car and definitely has a mortgage or has land. They are just starting to be serious about their lives.

What is the age bracket?
Between 28 and 35. Right now 25 year olds earn that much.

So that’s where you target your energy in selling new banking products?
Everything, that’s where our biggest focus is.

I would like to know when you are thinking about how you direct your marketing, what dictates where you spend your money? Im particularly interested in outdoor advertising – where do you spend your advertising money?
It depends what campaign im doing but from next year will have billboards. We have changed our strategy if you notice we used to have lots of streetlights and what we call directional signs – on Waiyaki Way we had lots of those. Discussion about what is a directional sign
We had that for 2 years and now we are going to buy maybe 100 billboards for the whole of next year throughout Kenya.

How much does that cost?
A lot of money but we get quantity discount because we are going to have lots of sites for 12 months. Right now we just buy according to the campaign and that’s expensive

So why billboards?
We wont even do a campaign its going to be generic. If I run a campaign for say a current account I can decide to take up 20 so in the marketing department we have different categories – corporate, retail and general brand. So the billboards are going to be procured by brand and then every time I run something as retail they will invoice me, its an internal process.
And when youre thinking about how you market that brand do you say to yourself I am going to market this brand on 20 billboards in the major cities eg Kisumu, Nairobi, Mombassa, Eldoret?
Ill give you an example one is Christmas campaign where we are trying to people to take up school fees loans now instead of waiting till January. For me what determines where I go first, I had about 2.5m shillings mostly targeting our internal customers not necessarily outsiders.
So I did newspaper ads, then I did sms’s to our customers, I did e-shots, on our atm screens I put something, I didn’t do billboards because its such a short-lived campaign it wouldn’t bring value to me however im running a card campaign encouraging people to swipe their cards over the Christmas period but they will have to continue to swipe in January february so that one im going to go above the line from February and I will go outdoor then.

So what dictates when you go outdoor? Is it when you want to go big?
It depends on the product and who im targeting. Sometimes im doing a campaign to bring in new customer acquisition and then ill go outdoor because outdoor lasts longer.

Because you are paying for a billboard to sit there for 3 months?
And it lasts longer so I the value for money I get from billboards is more

How do you know what vfm you are getting from billboards?
Half a page is about 300k in the newspaper you will see it put it down done finished gone. If I put a billboard up on Waiyaki way and youre always stuck in traffic on Waiyaki Way lots of people will see if for at least a month and its going to cost me 200k, so I get more value because youre always going to see it.

I am interested in where you would put the billboards?
Again it depends on the campaign im running.

So you said at the beginning of the conversation that you would target clients who earn 30k would you necessarily invest in a billboard for that client group or not?

I would because when im doing a savings account campaign im trying to get in what we called liabilities so we want money that we can lend out, its cheaper to lend out money we have been given by our customers so I don’t care who brings me the money. So I make sure we have a billboard in every town we have a branch and these people are definitely earning between 30 and 70k a month up country. And yes ill put one in Jogoo Road where im sure those people are and ill put one in Westlands where middle and upper are, ill put it everywhere. Im interested in two areas along the old Naivasha Road and it drops down onto Ngong road so you go through Kwangware and down Ngong road into a middle class area. I drove through Kwangware and there is not one billboard in there, would a bank like yours bother targeting that group?

No

Why not?

Because those people want to have a branch where they are, I cannot be that branch, my network doesn’t allow me to be mass market. So yes I might have a product that serves them if they walked in but they would be disgruntled by my services because of my network, they keep complaining we don’t have an atm at Kawangware, we don’t have plans to put an atm there

And youre not interested in that group?

No because until we get like kcb or equity we will never be able to adequately serve that market.

Is that because you want to protect your brand?

We have come a long way before we decided to be who we are. In 2010 we tried to go mass market, we even had a product that was ksh 60 per month and we just couldn’t we realized the impact on our capital because we were investing so much – we weren’t getting a return

It wasn’t to do with your fancy customers? They wouldn’t object?

No

It was to do with having to invest too much?

Yes and also people understanding that we are affordable. Even now equity bank is extremely expensive?

Really? Because people flock to equity?

Yes because that’s the perception. Noone puts all the rates together and decides, people go by perception. I think equity is affordable, ok ill go there.

The perception is that equity is affordable because equity is in places like Kawangware?

Yes and also how they claim ‘we are the bank for the people’ and also a bank that is local cannot overcharge me an international bank like cfc stanbic of course they are going to overcharge me because they are not local.

Can I talk to you about the images you use in your advertisements. How do you decide what images you use?

Its very challenging for us one because we don’t have the marketing budget that the local banks do like equity or kcb, they have very large marketing budgets therefore they have, they can do photo shoots because it costs a lot of money to do those things, they have to pay model fees and it costs a lot of money. Most of their adverts like cooperative bank have Kenyan people in. We don’t, we buy images.

From where, a library?

Yes

How do you decided when you look at the images?
I can just see when I look at the images this is not Kenyan.

**Are you looking for people who look Kenyan?**

As close as Kenyan as possible

**If I was to drill down on those images, what exactly are you looking for when you say you are looking for a Kenyan image?**

Skin colour

**What colour do they have to be?**

About my colour. Chocolate or darker

**So you couldn't have someone my colour, im a little fairer than you?**

Yes you can but it depends on how your hair looks

My daughter would not pass in any of my adverts (mixed race child) she is too fair and her hair is too long for African

But some of them can – my card campaign, there is one images we went with because they are at the beach and the girl is like my daughter looks mixed race but the couple running with them is not. But the fact that its targeting people who travel overseas I know that’s the middle to upper class and they would not be so fussy about how they look.

**If you are running a card campaign and you want me to take up a credit card, someone like me who is in your core middle segment do you think someone like me makes choices based on the use of images?**

No but the 15 – 45 not as much. The 150 and below maybe. The 450 and above wont even notice because I was targeting people who travel abroad and who want travel Insurance meaning they are not travelling to Tanzania, they are travelling abroad and they care about travel insurance and im offering free travel insurance if you buy your ticket with your card.

**So you are saying the people (earning) 150k or below will notice things like skin colour, the hair?**

Yes they will say that’s elitist, who does such things?

**So if you were selling a product that group, the 150 and below, what would you be looking for in the images you chose from the library?**

As close as possible to local looking people and even the environment I would probably change.

**Could you give me an example**

*Looks at phone*

See she looks Kenyan, she could pass for me. (woman with yellow jumper) I was supposed to use this for my branch in Mombassa but I wont use it

This in Mombassa will not pass because she doesn’t look like one of them.

**Please describe the image?**
She's very Nairobi

Why?
How she's dressed, her nails, her make-up, her hair is out, she's not fair enough for Mombassa

*For Mombassa she would have to be paler?*
Yes. This is a Nairobi girl. Too Nairobi. People in Mombassa are not too put together like this.
I can use this for a product that cuts across I can use this for a flyer say for mobile banking

*Does it matter that she isn't married?*
No. Unless I'm doing something which includes a family and they are buying a house then I will look at those things – they can't be together and she isn't wearing a wedding ring, looks odd.

*If you were trying to sell a product in Mombassa how different would that woman look? Firstly would it have to be a woman?*
No it doesn't really matter as long as there is a good balance between male and female. The guy one has a laptop so that's fine and the chic has a phone so that's ok. So this one I can't use – *points to piggy bank* – because Muslims and pigs don't go together. I can't do piggy bank there. In fact as a bank we don't use piggies because we are sensitive to the Muslim culture.
This guy is fine, even in Mombassa I could use this, he’s relaxed, his button is open and he looks very Kenyan but for a lady I would use someone slightly lighter.

**Why does skin colour matter? For the 150 and below people would you have to have someone who looks darker than you and I?**

No but this is a typical Kenyan colour. You would pass but your hair is not Kenyan, its too long. I’m not typical, I would not put me in an advert unless my hair was shorter.

The woman in the first advert, she has relaxed hair.

Yes but even this is Kenyan, she looks middle class, straightened hair.

**Could you use this for 150ksh and below?**

No I would not have her with car keys. I would probably use a man standing with cars behind him.

**No connotation that he owns the car?**

No. This one is too 150k and above and she has reached that age. Someone who is 70k and below, not youth, would find her too extravagant. 70k she owns a car and say this person is 30 – its too much but for someone who is 25 who is earning 70k ie a youth then that’s aspirational.

**You selecting people who are just within the possible reach?**

Also some level of aspiration.

So an aspirational figure for someone who earns at the lowest end of the group you would market to, what does that aspirational figure look like? Say for example I’m targeting a teacher, we have schemes with teachers, we go as a bank and give them preferential accounts and services, teachers bank with us they will have their salaries the same day etc that kind of person – so the image I used was just a guy bending over with the word ‘loan’ written on his back, the loan is heavy and then we are offering him something. Even the guy in that ad was a very regular guy.

Our salary advance product are usually the ones 150k or below who will take it. Its usually a guy in a shirt tucked in pushing his wallet. He needs his wallet to stretch to the next month.

**Both of those images are about toil?**

We are appealing to people’s physical effort. People are working hard for their money. But to be honest when we are doing a lot of mass market things at the lower end of the market we had to do a physical shoot.

**Why?**
The lady had to be in a kanga, she had to have a kitamba or something on her head, they relate to such things, anything else they think this is not for me.

**You had to physically stage it?**
We had to look for someone who looks like them, dress them up, take a photo and that’s what we would use.

**Those images are not in libraries?**
No they are not

But even there are some images for example the card campaign was pan African and we got some images from South Africa and I couldn’t use them because some of the holiday things we don’t associate with we don’t have a 30 year old guy dressed down with a man-bag at the airport – that’s not Kenyan so I chose a couple with Paris in the background having their picture taken – that’s Kenyan.

**Have you ever got it wrong in terms of the images you’ve used?**
Not that I know of

**What campaign have you done that has really resonated or hit the spot?**
I think all of them. Because people will give you a backlash. In 2010 we launched a thematic ad from SA ‘lets be the bank that does….’ It was very creative it had a rhythm but people thought it was elitist so we scrapped it. Our posh clients were ‘oh that’s amazing’ everybody else was like nobody understands these people.

Show Africa Rising images

**These are images from internet I googled Africa Rising and these were images from the first page, if you googled now you would get different ones.**

**Are any of these images anything you would use as a banking group?**
For something to do with corporate banking and how are bank has built Africa then I may use that (points) would you use any of the sunsets?
Yes I would use such things for the diaspora campaigns, its very savannah but I wouldn’t use (toil) we don’t want to be seen as struggling

**What do you think as a marketing manager you see when you look at these images?**
What they west think of Africa – oh we are struggling, so stone age, likes (kite in sky) this is what I would expect a mzungu to think about Africa.

**Do you think as a mm these sell Africa in a positive way?**
Some do and some don’t – one with the face this is very personal.

**Do you use the shape of the continent in any of your advertisements?**
Yes when we are trying to show we are an African bank because that’s what we are as a whole. But in Kenya no, unless we wanted to show how cfc stanbic bank can help you connect with the rest of Africa.

Once we were doing a product for the UN and in the image we had to photoshop 6 different people – white, West African, Kenyan to represent the continent because we couldn’t use one African. We could use one white person but we had to show the diversity of Africa – one would be in a suit and one would be in a traditional dress

**Would you use Africans in traditional dress for domestic campaigns?**
Those ones are working so I would use them for my sme (small medium enterprises) because we are doing something for trade so people in kikomba, people in markets you have to show people like that but people who are looking really nice but still one of them.

**Are they still aspirational?**
Absolutely. They have made it but they are not snobbish. I know that we are all aspirational even if they are earning 150 I want to look up to someone who is earning more. You want to associate someone who is there not just your peers. I always ensure everything I do is aspirational.
They are not just wearing a shirt and bottoms but they are wearing a coat because it shows they are slightly more serious and after that the next one up is wearing a tie.

**Certain things like what you are wearing, colour of skin, jewelry or hair all indicate certain things?**
Yes. I would never cast me in an ad because with my hair people would say im trying to look white but if I had something short, still a weave but shorter then yes.

**Would you cast someone with natural hair in a cfc advert?**
Yes I would.

**Where? To target your corporate clients?**
No, no no no no. Right now natural hair is in so if I cast someone it would be to target the 27 – 32 year olds because now they understand it, my mother would be ‘why is her hair so unkempt’. I have no problem with like slightly shaggy hair but the woman would be in a suit dressed up going to work. Younger people would think ‘she’s lost it’. And that's only for the urban cities. Someone who is 27 from a rural place Nakuru town, would not understand it either.

Ad for self service banking retrieved from [http://www.cfcstanbicbank.co.ke/Kenya/Personal/Self-service-banking](http://www.cfcstanbicbank.co.ke/Kenya/Personal/Self-service-banking)

People connect with radio so much because its very interactive because they have no problem calling Citizen and talking about banking services. Radio you win, forget about print, ill struggle with outdoor but I can do a bit of tv because even in the slums they probably have a tv somewhere where people go to watch but mostly its going to be radio and then activations – I will have a truck go to their places.

Is that based on a cost analysis?
KARF data tells me who the target market is for certain stations.
For the poor I use activations – go to the village hand out free samples etc
That market segment is price sensitive and they don’t have a lot of money for choices, they only use what has worked for them.
Its mainly about price sensitivity
Also quality – I belive in this and its worked for me and for my neighbor

**What would it take to make people change?**
Eg theres a new soap from Bidco if they did an activation and gave free samples and the price was slightly lower and worked just as well they would switch its important that people can try the product.

Citizen tv runs ‘the shopping list’ they show margarine, soap, toothpaste and show how much nakumat, tuskeys, naivas because they know it makes a difference to these people.
Airtel is the fourth largest telecommunications company in the world originally from Delhi and now in 20 countries worldwide Kenya being one of them – 17 countries in Africa where airtel operates. The core issue of what we do in terms of connecting customers is to ensure that the messages we have for products and services are communicated effectively and understood by consumers so the brand goals of the company can be achieved over time.

**How you communicate and the choices that you make about this and the messages received – how do you know they are working?**

A lot of people think advertising is just about putting up images but there is a whole process of understanding the people we are connecting with so we go through a lot of research first to get to understand first how consumers are thinking, their motivations what challenges they are facing. There's a whole science behind the understanding of communication and the need for it to connect with the beliefs, the motivations of customers. If we don't do that putting images out there might end up being catastrophic in some cases. We first of all conceptualise a product but these concepts are based on what customers are looking for. We look at how many customers we have in each segment of the market and the products they use, why do they use them, what are the gaps in the market, what does it mean to them. Then we make advertising that will try and deliver that product message to the customers.
Do you test those adverts?
Certainly yes we go through first a stage of creating a brief, then agencies create based on the research and then before adverts are finalised we go into focus group testing.

About understanding the market, how many segments do you feel there are?
On a broader basis we segment the market based on demographics and activities. We use the method often used which is a day in the life of a typical consumer. How their lives are structured. What media they use.

How do you use this information?
Customers don’t sit waiting for advertisements of products and services. Products and services have to fit into the days and lives of the consumers, into specific dayparts. A lot of advertisements fit into the ‘morning wakeup’ or morning drive. It needs to blend into that environment. Driving to work – there are particular zones in the city of Nairobi into residential and business district so in that way communication by roads are structured to inlets and outlets of the city. The understanding is that consumers use these routes every day so you tap into the opportunity for people to see.

Most of the people who are looking at billboards are in some mode of transport. They don’t necessarily have to be people who are driving, they could be walking. It doesn’t have to be part of the environment – billboard advertising is structurally evolving.
What do you mean?
The biggest billboard we had was 4ft x 6ft which was once considered huge and we had to get permission from the council and people complained about the size of the billboards. Today we have them 24 x 10 and they are not flat sheets they are being made into shapes of products, shapes are jutting out, some have lights – the whole thing is about capturing attention – size shapes lighting and positioning. We have billboards that have messages that are changing – live billboards. Look at broadway it’s the centre of billboard advertising. Its not just about advertising products and services its also community service – some have clocks on them some have public service information. Assumption is that people are in transit and they get opportunities to see – you could describe billboards as points of interruption.
Billboards rely on little text and huge images so capture the eye and deliver the message in a couple of lines. You get 10-15 seconds if you’re lucky.

When you decide to use billboards what criteria is affecting your decision?
Media does not work in isolation even though we say everything communicates. The purchase process takes place at different locations so there has to be some synergy between what you have outdoor and what is available in the store. Pre-communication. All of the communication works together to deliver one message.

Describe the road I analysed – no billboards in Kawangware instead building branding. What about your customers in those areas?
Theres a bit of math involved – people are transisiting from residential areas to cbd think about the arteries the roads feeding into Ngong Road and where that road feeds into. Arteries create billboard use because the assumption is you’re going to create traffic in those areas and therefore more opportunity to see. If I put my money in Kawangware I communicate to those people alone, if I put my money along Ngong Road I will catch those people and all the other neighborhoods who feed into Ngong Road. Especially for mass market communication it has to be aimed at the midstream but we have a core user.
Rising Strivers are they your target market?
Yes we know them as ‘aspirational followers’ they are our core market but we don’t talk to them directly because if we did their aspiration would drop to the floor you have to offer the something they can aspire to which is something you (ie me) would aspire to as well because you are reflected there.

Discussion around Airtel products
Building branding in Kawangware – do get involved in that if so why?
Yes we do. Its all about product recall. If that product is in your face it builds a curiosity and whatever idle time you have you will turn around and see Airtel.
Why there though?
Zoning of the city is a factor - in the heavily populated areas you will see lot more wall branding or brand presence as we call it and that’s why you see it in the stadiums.

Discussion about Airtel roaming offer and connecting across boarders
When you’re thinking about how you market Airtel within Kenya how do you make it Kenya specific if you’re part of a large company which markets across the continent and elsewhere?

As a global company we have a glocal mentality – think global act local. We have a product called airtel money available in Africa and India so the advertising is created internationally and then different countries are then given this to localise. The voicing would be different, the billboard may be similar but the language different and the images different. At the moment we are using ‘Teacher Wanjiku’ to promote Airtel money because she resonates with local audiences. Our challenge is to unlock the connection she has with audiences to sell our product.

**Generic products?**

Eg Vurumisha – its not a word in the dictionary. The concept came from the focus group – they come up with the ideas. Connecting people with imagery then linking them with creatives to further conceptualise it.

**How important are fgds to the process?**

It’s the difference between chalk and cheese. If you test advertising the degree of certainty increases the more you involve customers.

**Example of a campaign that worked and one that didn’t work in relation to billboards?**

I will start with Tusker beer. We created some advertising to compete with SA Breweries and East Africa Breweries had the largest market share. They positioned their beer (castle) as the No 1 selling brand in Africa so if you want to aspire to be a number 1 African then you have to drink that beer. We then tried to think about what made Kenyan Tusker so special for Kenyans. We put together a collage of images – barley fields, trucks transporting tusker, people in the bar, after work in the bar, people working on farms, blue collar urban workers – in the evening what do they do. What do they do after work and where do they catch up with friends and family. At the end of the day relaxation – so the connection was made with hard work and relaxation – after work, enjoy yourself have a Tusker. You can have fun with Tusker. When you go back and look at the last 50 years and where Kenya has come from – theres only one thing moving Kenya forward and that is hard work. Its my country and its my Tusker so then the whole thing about Kenya my country and Tusker my beer forever emerged. In Swahili it translated into Tusker with friends, forever. It eventually became a successful campaign that drove SAB out of the market.

**Women or men or both?**

Regular women not ‘frivolous’ women – average woman who wears local clothes, hair like you, regular – Tusker is everyones beer so it shouldn’t offend anyone.

**Story about the challenge of trying to take Tusker to the East Africa market**

**The notion of heritage is a big deal for Kenya – brands or culture ?**

Yes its huge. Kenyans have a rural urban structure where one foot is here in the city and one foot is in the village.

**What do you think are the most powerful heritage markers in Kenya?**

Safaricom has taken the position 100% Kenya, the brand that helps you, the ‘harambee’ (pull together) brand if you like, if you’re in trouble turn to Safaricom. They work because they have their insights right. Look at Mpesa its built on the rural urban connection.

Look at Coke and the imagery the use repeatedly of a thirsty person having a sweating coke on a hot day like this.

**When you think about the choices that you make about what images to use what dictates your choices?**

Resonating with customers. In a fgd 10 – 12 people in a room you put a wall of collage and before you trigger the conversation you make sure you make sure the group have gelled then you introduce the stimulus material – you ask what the images tell you.

They look at the face and what they tell you.
What kinds of details do they see?
Tribal issues definitely, they are looking for an average looking Kenyan. What are they wearing, is it too bourgeois? If hes at the beach why is he wearing shoes? Talking to consumers peels away the stereotypes we have as marketeers because consumers don’t have them.

If youre selling a mass market product and you put a mercedes in it then they think its not for them but put a Toyota and they think its for them. Even colours make a difference.

Which colours? Have Airtel cornered the market in red
Airtel is very nascent and has only been on the market for 3 years. It’s a brand that has changed ownership a lot.

Discussion about vodacom and vodafone
Brands are humans. Brands live, they are not just objects that sit on a shelf, they have a lifetime over a number of years – you are nurturing a human relation. Look at Coca Cola.
If youre advertising a Kenyan brand and you use Mount Kenya then Kenyans will recognise it. If you use Kilimanjaro and try and sell the larger in Kenya it wont work.

Do Kenyans want things that are theirs?
Yes. Kenyans are very aspirational to the West but they are also very proud of the things that make them Kenyans. We tested the Tusker advert on Kenyans in London and many of them cried. My country is so strong in me.

Does that create a tension? An affiliation towards Kenyan-ness and a pull to the West?
Yes it creates tension sometimes and confusion because we integrate into the international community but we are still ingrained with Kenyan identity.

Annecdote about Kenyans in business
In terms of the African Renaissance idea do you think that is something Kenyan companies like yours are part of? Is it a real thing?
My company is 3 years old in Kenya and its Indian. We are now changing our strategy – let Africa be run by Africans. They might not say it overtly over the table but its manifest in the change of strategy. Everywhere you go successful business are being run by Africans.
When I worked for Coca Cola when I joined there were 8 of us in Marketing in 2 years there were 60 people in marketing. What does that say? I don’t think its just a myth. The root cause of it is understanding the connection between the customer and the product.

Can it transform peoples lives?
Im a believer in it and a realist because I have seen the transformation made over time. 25 years ago when I was working in this country for Ogilvy Mather all the top positions were held by ‘mzungus’ now the most successful advertising agency in Kenya is Scan group which runs Ogilvy and run by Africans.

Its doing better because of insights. Information is face value but unless you mine the insights you are lost.

Is this confidence to do with the way Kenyans see themselves but also the images that are reflected?
You see it you believe it. Why should Airtel be so different from Barclays or Coca Cola? If you want to build your own model of success then just learn from what others have done. Our company has the same information as Safaricom has but the difference is the application of insights. The most successful brands in Kenya now all have local names – those names have been coined by local people – Safaricom, Mpesa, Equity Bank, Keringet, Roico, Kenyol, Ketepa, Tusker – all the resonating names that are working well for Kenya are things that people can relate to – they have to rhyme with the people of the culture, makes you successful in many ways

**What percentage of a campaign goes on pre-testing?**
About 10%. Some companies do more but that’s the base. If I get it right it goes by itself but if I get it wrong I have to put a lot of cash behind it and it still may not go anywhere. Spend more time on the drawing board – it means get it right.

**How many do you do for a new product?**
Maybe 3 or 4 each costing 600k ksh for each one.
We draw one socio economic group but from different places – we are key on geographic representation because we can understand what is localised.

Councils own the licences for the billboards – it’s a form of revenue for them. Its assumed that space you are taking belongs to everyone in the city so you have to pay a service charge for it.

Duration 83.00’
APPENDIX G

ADVERTISING SURVEY

Tips for conducting focus group discussions:

**BE NEUTRAL**, avoid agreeing or disagreeing with the points of view of participants.

**BE RELAXED** and make the discussions **CONVERSATIONAL IN STYLE** and not an interview.

**BLEND IN** with your participants; use their words, blend in with their culture, appearance and status. If they are more comfortable in Kiswahili or English please adapt.

**BE FLEXIBLE** as interesting perspectives emerge and follow up where necessary.

Try to follow the **TIME PLAN**.

Maintain the **ATTENTION** of participants by keeping them focused on the questions and involving them **all** in the discussion throughout the group.

**BE CAUTIOUS** of negative non-verbal cues like frowning, looking away, not acknowledging what is said etc.

**BE THE FACILITATOR NOT THE EXPERT**.

---

**NOTE TO MODERATOR:** You should have a digital voice recorder and batteries for this discussion.

**Introduction**

To begin with, I would like to introduce myself and my colleague to you all. My name is …………… and my colleague’s name [look at your colleague] is ……………

I would like to greet all of you and thank you for agreeing to participate in this focus group, where we will ask you for your opinions and thoughts on advertising. Your participation is really important to us. But first we need to know that you freely consent to be part of this discussion.

**Do you freely consent to be part of this discussion?**

Because there is only one person to take notes while we talk we would like to record this group to ensure we capture all your thoughts. This audio will not be broadcast via any means or media. We will keep it confidential and it will only be used only for report writing purposes.

**Do you agree to us recording today’s group?**

Please remember to **speak up**, only **one person talk at a time**. Again, everything you say during this group will be **confidential** and your name will not be associated with anything you say. In this discussion, there are no wrong or right answers, we are just interested in what people have to say.

Do you have any questions you want to ask us before we can start our conversation?

---

<table>
<thead>
<tr>
<th>Warming – Up/Introduction</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>For the sake of this meeting, could you please kindly introduce yourself to the group? Tell us your name, occupation and where you live</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Purchasing habits</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>What top 5 products do you regularly buy? (Prompt from a range of products – household, foodstuffs etc)</td>
<td></td>
</tr>
<tr>
<td>Where is the most common place to shop? (Prompt duka, market,</td>
<td></td>
</tr>
</tbody>
</table>
supermarket). If supermarket which one do you go to and why?
- When you go to the shop do you walk, use public transport or drive?
- Who has been to the Westgate Mall? What is your impression of that place? Would you consider shopping there?
- What is the most common product you would buy from the duka and in what size?
- Do you go to the same duka, market or supermarket?
- Overall which one product do you spend the most on and why?
- Which of the products that you buy regularly changes the most in price?
- If you were to purchase Mchuzi mix for example – which of these sizes are you most likely to buy? (show products)
- If you saw a new product in the market what would influence your decision to buy? (prompt: cost, value for money, appealing advertising, packaging, the promise, recommendation)
- Have you ever made an unexpected purchase? What was it and why did you buy it? Did it make you feel good or bad?

Brand awareness
- Show images of unilever products (C) – which have you bought and what size
- Would you consider buying an alternative to these products if they were cheaper?
- Would you consider buying an alternative brand if they were more expensive but promised better results?
- Do you trust what the advertising says about these products eg tastier stews, fairer complexion, cleaner clothes, softer skin
- Can anyone talk about an advert on tv, radio or print for any of the products on the list? Ask them to describe the advert and the people in it.
- Do you feel these products are aimed at you? If so why? If not why not?
- Show coca cola product line (D) – How many drink this product? How often? (daily, weekly, occasionally) Which of these bottle sizes are you most likely to buy?
- How much does the bottle cost? Do they return the bottle if it is made of glass? Do they re-use the bottle if it is made of plastic?
- What do you like about this product?
- What don't you like about this product?
- If given the choice between Coca Cola and another soda brand eg Fanta which would you choose and why?
- Do you think coca cola is affordable? If so why if not why not?
- If you could improve it what would you suggest? (Prompt: taste, packaging, cost, availability)
- Can you talk about the way Coca Cola is advertised – where are you most likely to see the adverts, what do you recall about them, can anyone remember any of the words associated with the product?
- Show coke zero product line – has anyone ever bought this product? Do they know what it is? What does the 'zero' stand for? Would you consider buying it or would you prefer to stick to a brand you know? Can anyone describe an advert related to this product?
Advertising awareness

- Think of an advert for any product and describe it. Why is it memorable? What do you like about it? What don’t you like about it?
- What do you think advertising is for?
- What is the most commonly advertised product in the area where you live?
- Do you think seeing advertisements every day influences your decision to buy products? If yes, how?
- Are there any large billboards where you live? If so what do they advertise?
- Before most of the dukas became covered in coca cola advertising what did they look like?
- When you see an advert talking about something you like but cannot afford what does it make you feel?
- **Show ad of two billboard ads (A)** What type of person do you think buys these products? Are they wealthy? Where are they most likely to live? Paint a picture of the kind of person who buys the different products.
- **Show images of logos (B):** which of these logos do you recognise and what product is associated with it.

Wrap-up

- Do you have any comments or suggestions you would like to share regarding our discussion today? Please feel free to share with us.

**THANK RESPONDENTS AND CLOSE THE DISCUSSION**
## APPENDIX H FGD ANALYSIS GRID SYNOPSIS

<table>
<thead>
<tr>
<th>COMMON PURCHASES</th>
<th>SHOPPING VENUE</th>
<th>PRODUCT SIZES &amp; BRAND AWARENESS*</th>
<th>AD AWARENESS</th>
<th>COKE PURCHASING</th>
<th>COKE ZERO</th>
<th>AD AWARENESS</th>
<th>BILLBOARDS**</th>
<th>LOGOS***</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unga (maize flour), milk, sugar, paraffin, cooking oil, water. Price of milk, paraffin and cooking oil change the most;</td>
<td>dukas (local small shops)</td>
<td>royco cubes 2 for Kshs 5 ($0.05); OMO Kshs 10 sachets ($0.11); Blue Band margarine Kshs 10; Vaseline Kshs 30 ($0.34); Sunlight KShs 20 ($0.22) None of the group bought Geisha soap, Renoxa or Lifebuoy considered too expensive; some group members preferred to use Ariel as its more powerful in getting clothes clean and is 'good quality'</td>
<td>Blue Band - when mum forgets to put it on bread; Sunlight; Geisha ad on tv; Lifebuoy on tv 'kills bacteria'</td>
<td>All group members had purchased the smallest coke in a plastic bottle; 'only when I have visitors'; &quot;it removes gas&quot;; products preferred to other alternatives in the market eg Mirinda; easily available in the shops</td>
<td>4 out of 10 purchased; 'has no gas'; 'not much sugar'; others would like it in smaller volumes so its more affordable; 'I saw it advertised as a movie'; some had seen the billboard at the start of southern route</td>
<td>royco; blue band ads described; most common - coca cola, omo, pampers, sosi soya; nivea; no billboards in locality; samsung galaxy 'too expensive'; 'safaricom products good but cant afford - meant for business people'</td>
<td>Sky vodka - 'targets Runda, Karen people'; meant for 'high class' earning Kshs 40k and above ($450 per month) Housing - 'a 2 bedroom house targets those with good earnings'</td>
<td>Only LG and Emirates brand was recognised by more than one member of the group</td>
<td></td>
</tr>
</tbody>
</table>
milk; sugar; charcoal, unga, kales/cabbage; paraffin; bread; omo; 'use salty water'
dukas (local small shops); 'supermarkets is for the rich'; change the shops because prices change; sugar and pembe (flour) change price the most; 'if milk price rises we buy 'pima*' milk from the cow available in small measures

<table>
<thead>
<tr>
<th>COMMON PURCHASES</th>
<th>SHOPPING VENUE</th>
<th>PRODUCT SIZES &amp; BRAND AWARENESS*</th>
<th>AD AWARENESS</th>
<th>COKE PURCHASING</th>
<th>COKE ZERO</th>
<th>AD AWARENESS</th>
<th>BILLBOARDS**</th>
<th>LOGOS***</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oyo seasoning - no member of the group had ever bought 200g or 60g pack; majority bought in cubes of 2 for Kshs 5 ($0.05) or a single cube for Kshs 3; an impulse purchase eg spices; 'taste, price, advertisement' given as info to buy a new product; only 1 person aware of Westgate Mall; Junction Mall few had been there 'to look in the windows'; Fair and Lovely 2 had used Kshs 56 ($0.64) but can buy small size for Kshs 20; all use Omo sachets Kshs 10 - one buys Kshs 40 size; Blue Band Kshs 40; Vaseline 1 person spent Kshs 250 ($2.8) others Kshs 15 or 20; none</td>
<td>Ariel washes whiter'; 'Blue Band mother tells her son if he eats BB he will be strong'; tv ad for Omo a baby dirties herself and Omo washes it clean; 'ads target the ladies, they do the shopping'</td>
<td>All purchased coke; 300ml @Kshs 35 ($0.40); always plastic bottles when travelling; reuse for paraffin; '1L bottle seen at parties eg birthday or christmas'; 'like coke, prevents constipation'; 'fanta too sugary';'Krest if you have flu it clears it'; would chose coke if given choice of other brands; ads seen tv, billboards, radio, shops, posters; 'on tv after player games players take coke'</td>
<td>1 out of 8 used 'did not like the taste'; nobody could say why it was called 'zero'; 'it does not have gas'; no recall of ad; all would like to try coke</td>
<td>Coca cola ads seen during world cup; Ariel ad described; Omo 'clothes are too clean'; 'its a game'; discussing taste of food; pampers - the baby is dry all night and active in the morning.</td>
<td>Only LG logo recognised goods should come in small sizes; 'should not bring adverts for Sarova, Emirates are meant for rich person'</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
bought Geisha, Lifebuoy, Renoxa; when money is scarce or prices rise people move to 'pima' purchasing - buying unpacketed quantities, measures taken from larger packets
<table>
<thead>
<tr>
<th>COMMON PURCHASES</th>
<th>SHOPPING VENUE</th>
<th>PRODUCT SIZES &amp; BRAND AWARENESS*</th>
<th>AD AWARENESS</th>
<th>COKE PURCHASING</th>
<th>COKE ZERO</th>
<th>AD AWARENESS</th>
<th>BILLBOARDS**</th>
<th>LOGOS***</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>phone credit; milk, cigarettes; alcohol, vegetables, newspapers</td>
<td>dukas and supermarkets - Tuskys, Prestige, Quikmart, Uchumi; prices perceived as generally constant the variable commodities are vegetables</td>
<td>Selecting the seasoning cubes several people chose the large 220g pack; one chose this size and 'would keep the tin to refil with indiv cubes'; one participant 'buy smaller amounts to avoid misuse'; when I go with my parents they buy the biggest size'; 'i buy 220g size once a month'; packaging, marketing, recommendation, quality and brand name (in that order) would influence decision to buy a new product 'eg Truworths, Mr Price'. Impulse buys were gender specific. People talked about prioritising essentials first. All had visited high end shopping malls - 'junction is doing majority of group trusted advertising slogans - 'the more you market a product the more popular it becomes' however the quality of a product would be biggest factor over cost when considering an alternative; Blue Band ad recalled; Wahu (well known musician) and Rexona; Omo ad about a girl kicking a ball; Royco mchuzi mix; Majority took coke daily; 300ml and 2L common purchase; glass bottles; some wanted to see 6 pack of cans so they could bulk buy; annoyed by lack of standardised pricing advertised at KShs 25 but often sold for KShs 36. 'A commericial that stands out'. Some talked about a popular tv ad. Ads mainly seen on tv such as 'Pop Idols', billboards along Ngong Rd; Facebook. 'Billboards are for those Some had tasted it, 'don't like the taste, its flat'. One person liked it because of the advert. Majority thought zero means no sugar, others thought no calories, some did not know. Felt it targeted males and 'hyper people who wouldn't need energy' A condom ad for Durex seen on You Tube; sanitary protection seen on tv 'check check'; Durex 'even if you're naked you're protected'; Harpic with Nyambane (local personality). Ads with local personalities were most memorable. Rexona with Wahu. 'Axe adverts work really hard but consumers still don't buy'. Unaffordable commodities make consumers work harder to buy the product; advertisements create competition</td>
<td>Sky vodka - 'a painting comes to mind'; drink mixing contest; 'i even have an empty bottle'. Targets middle class over 18 with money, 'the elite'; 'over 25 working and independent', 'a classy person, working, campus'. Housing - 'the photo should capture the consumers eye'</td>
<td>Most of the group were aware of all of the logos</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
sugar, milk, tea leaves, omo/ariel, cooking oil, toothpaste, greens, onions, tomatoes

ad recall - some bought 220g pack 'had to budget for it', but knew the price of individual cubes from dukas. If a product is cheaper, is of good quality, interesting packaging may consider switching brands. Only buy new products 'if on offer'. Majority of group were not aware of Westgate Mall. Junction all were aware but 'rarely shop there' was common statement. Bought Blue Band 1kg, Omo, Gisha, Vaseline 100g, Royco Kshs 5, Sunlight

Oyo seasoning - some bought 220g pack 'had to budget for it', but knew the price of individual cubes from dukas. If a product is cheaper, is of good quality, interesting packaging may consider switching brands. Only buy new products 'if on offer'. Majority of group were not aware of Westgate Mall. Junction all were aware but 'rarely shop there' was common statement. Bought Blue Band 1kg, Omo, Gisha, Vaseline 100g, Royco Kshs 5, Sunlight

Kshs 70 for 1L bottle, small can or bottle for Kshs 30; 'I keep bottles at home and change them in the shop', 'plastic bottles are good when travelling' although some threw them away after use; 'coca cola is good tken by men in bars'; some bought Disani water (made by Coca Cola) 'because coca cola is trustworthy'. 'Has been there (sic in not broad awareness but 'may have used without realising'; zero means 'no sugar'

Lifebuoy 'after play use Lifebuoy', Rexona, Detol - kids playing use detol in bathing water to kill germs. Not much recall of billboards. Ads for phones have some influence on purchase 'but the prices they give are not the ones in the shops'; 'mainly buy washing soaps because of the adverts', 'adverts encourage you to go look for the product'

Most ads don't target the common man', advertisers 'should be honest - if they say the price in the ad it should be the same in the market', 'some ads are not real, you cannot find the ads in the market eg back to school offers, 'ads are there to benefit companies who dont care for the custoemers, they should maintian quality of products - they want to make quick money'

better than Westgate because of the different races that visit the place'; Omo purchased in larger sizes as was Vaseline, Royco (500g) and Sunlight. Nivea and Vaseline used the most.

who cannot buy newspapers or a tv'.

GROUP 4
SOUTHERN ROUTE - KENYATTA FLATS (8 PAX)

Ad recall - Blue Band and Vaseline both on tv. Feeling that ads target the younger generation 'they are quick to buy products', 'adventurous', 'those who don’t know how to plan for shopping'

Ad recall - Blue Band and Vaseline both on tv. Feeling that ads target the younger generation 'they are quick to buy products', 'adventurous', 'those who don’t know how to plan for shopping'

Sky vodka - young, rich 'people living in Karen and the likes' Housing - 'targets the politicians - they have access to money'

Aware of LG none of the others; recognised Serena but not sure what it sells or stands for

Most ads don’t target the common man', advertisers 'should be honest - if they say the price in the ad it should be the same in the market', 'some ads are not real, you cannot find the ads in the market eg back to school offers, 'ads are there to benefit companies who dont care for the custoemers, they should maintian quality of products - they want to make quick money'
for Kshs 45. Some would not go for cheaper products 'buy Ariel because it is soft on hands' Sunlight bar is good 'it has not changed in quality'

GROUP 5
SOUTHERN ROUTE - NGONG ROAD (5 PAX)

credit, bread, milk, perishables, groceries, fruits. On a weekly basis toiletries 'when the pocket is good' supermarkets, shops and local kiosks; price of avocados and tomatoes changing seasonally when rains are bad most knew the price of basic commodities; would be tempted to impulse buy if 'branding and packaging was appealing' and 'if recommended by peers'; 'first rule of business is packaging'; choice of seasoning all went for largest pack 'being an African I would re-use the tub'; 'royco is a superbrand'; Westgate Mall - 'assurance of quality' 'more niche shops'. Buy Unilver products 'because alternatives are

Ad recall strong. (Royco, Vaseline, Rexona, Lifebuoy) 'aimed at people who don’t already use their products'

Plastic bottles more 'convenient' to carry - 3 people recycle the bottle for paraffin or water; choice of other soda would be for 'health issues'; coke is 'affordable' some would like to reduce sugar, reduce gas 'I know its not good for my health'; ads seen for coke on tv, radio, at the junction; volunteered 2 out of 5 had tried but not liked - 'too much gas'; all knew zero meant 'sugarless' - 'meant for diabetics and health conscious'; seen ads on TV advertised by Daniel Craig Faiba Ad very popular because it is funny (Faiba are cladding dukas). Ads for 'creating awareness' 'frequent ads mean a product isn't selling' ads where they lived were for digital tv services. 'So used to seeing ads I don’t pay attention to them'. Alternatively 'adverts give me options'.

Sky Vodka - aimed at 'high class who are financially stable'; 'can’t put this ad in Kawangware! Its for people who are well off who have already catered for their basic needs'; 'young professionals'; 'these drinks look enticing but they are actually very cheap'; Housing - for people 'on a real income'

All brand logos easily identified by most of the group As a 30 something Kenyan man most advertising is not aimed at me'; 'ads are given prime time on tv - on citizen 15 mins of the programme is advertisements'; 'adverts are motivating and really helpful for companies to create awareness'
not superbrands”; “others are trying to imitate the packaging”; ‘only trust 60% what they say the product does. Am often disappointed”