



ADMF  
CREATIVE  
SECTOR  
STUDY REPORT



# THE AFRICA DIGITAL MEDIA FOUNDATION

A STUDY OF KENYA'S CREATIVE ENTREPRENEURS - THEIR NEEDS,  
CHALLENGES, AND AMBITIONS

# TABLE OF CONTENTS

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02	Introduction
03	Objective
04	Methodology
07	Summary of findings
09	Detailed findings
10	Demographics
15	Status
20	Equipment and software
23	Payments
25	Business development and positioning
27	A to-do list for the industry
29	What next?
30	Annexes



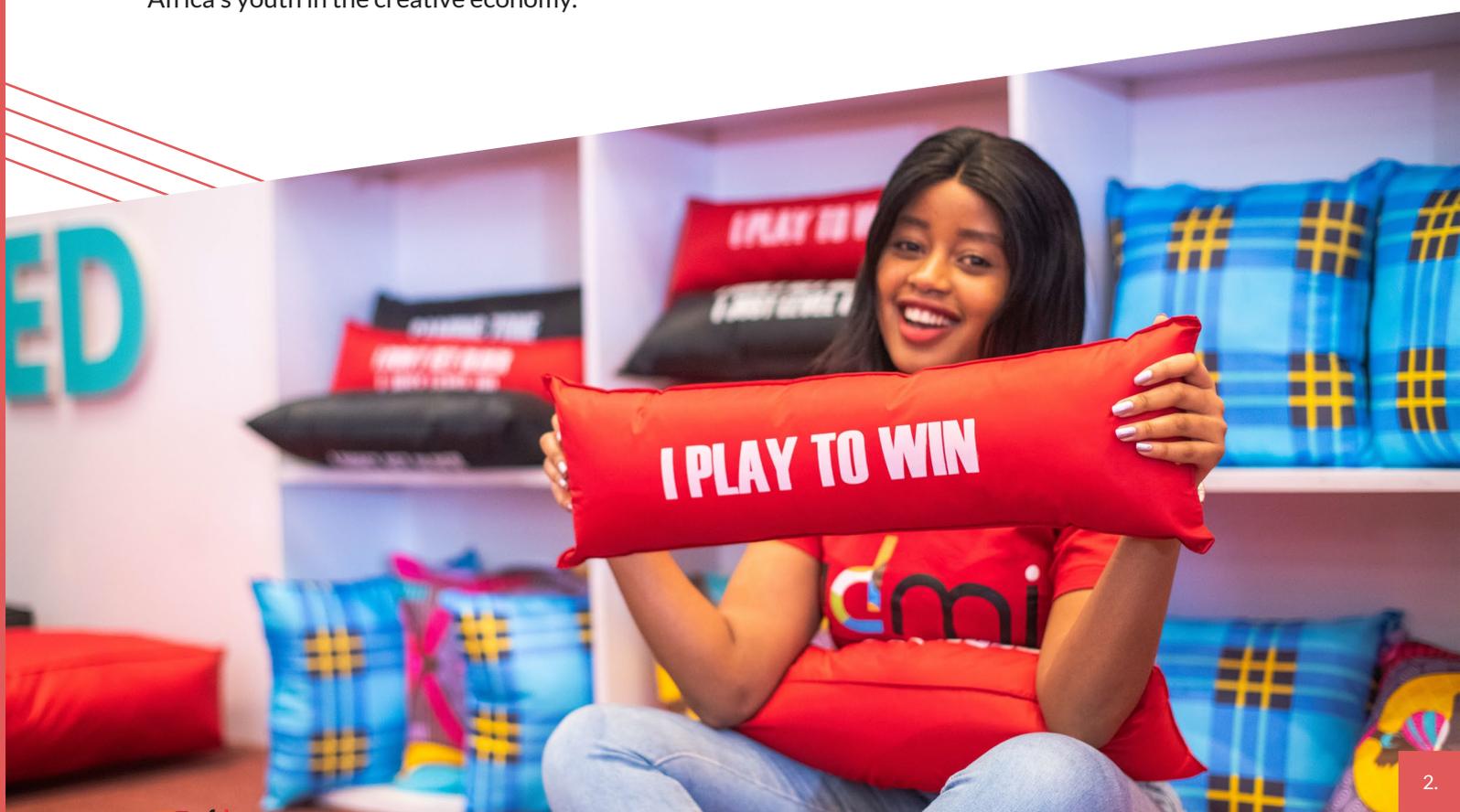
# INTRODUCTION

The Africa Digital Media Foundation has been working to create jobs for youth in Africa's creative economy since 2015. The Foundation was officially registered in 2016, as a separate entity to the Africa Digital Media Institute, under which these activities had first started. Since then, the Foundation has made significant strides towards achieving our mission: we have provided 88 scholarships to young men and women to pursue digital media education; we have run accelerators and incubators for animators and entrepreneurs; we have launched international learning partnerships with prestigious schools in Europe; we have provided digital media trainings in refugee camps, and organised community events and masterclasses to provide important skills and exposure to talented youth in Kenya.

As the Foundation looks ahead to the next five years, we have ambitious plans to scale our activities. We want to provide long-lasting, targeted services that will amplify our impact with the potential to create tens of thousands of jobs for Africa's youth in the creative economy.

Part of our plan involves careful research of the needs and desires of the creative community. We insist that our work be informed through consultations with the people we are aiming to work with and for, and it is only through such research, careful planning, and productive partnerships that we can justify pursuing any large-scale projects to benefit the creative community.

For this reason, in May 2020, the Africa Digital Media Foundation set out to conduct a study of Kenya's creative entrepreneurs and their needs and wants. This report is the result of that study, which we believe can be of practical use to any organizations working to increase and improve the opportunities for young people to work in the creative economy in Kenya.



# OBJECTIVES

There were three main objectives of this study:

1.

**Confirm The What** - to confirm that the ideas that we had for how to provide valuable services and support to creative entrepreneurs were valid and user-centred. We only mentioned our ideas for future projects at the end of the focus groups so as not to influence any of the previous answers.

2.

**Inform The How** - above and beyond confirming what we want to do, we wanted to gain insights into how to do it. In the same breath, this would also allow new ideas to emerge that we may not have considered: new challenges or potential solutions that have not yet been paid significant attention to, or emerging needs that have not yet come to the fore.

3.

**Suggest the Future** - this research is not designed to only serve ADMF. We hope that it will be of use to our peer organizations who are looking for guidance on their strategy, and who may not have the means or the networks to conduct such research themselves. It may also be of use to budding creative entrepreneurs, to inform them of the struggles, and the voices of the community they are entering into.



# METHODOLOGY

The first step in this research process was defining the key questions we were seeking answers to. The big questions we decided we wanted to answer, in order to be able to define the what, the how and the future as detailed above were:

1. What is holding Kenyan creatives back from earning more from their skills and passion?
2. What do Kenyan creatives need, in order to earn more, that we might be able to provide?

We decided that to get a deep enough understanding of these questions, and to be able to answer them confidently, we would need to conduct both a written survey (to be filled in by the individuals themselves) and focus group discussions and interviews, facilitated by ADMF. These focus group discussions would allow us to go deeper into the subject matter, and respond to new topics raised during the conversation.

After the initial planning stage during which we defined the above objectives and format, we proceeded to first conduct the written survey. We used Google Forms to make a basic self-reported online survey, with 28 questions. These were a mix of open questions on demographics and status, and multiple choice questions and open questions on individuals' work and circumstances. The survey was distributed via email and social media. We first sent the survey to ADMF contacts, made up of ADMI and ADMF contacts, employer partners, and the ADMF

mailing list of creative stakeholders. We then asked respondents for referrals to additional contacts beyond the immediate ADMF network. This was in order to increase the representativeness of the respondent pool, so that it would include individuals that knew ADMF and also new contacts that we did not know, and that did not know us, or have a history of interacting with us. This was successful, and we received more than 50 referrals to additional contacts, all of whom also received the survey.

We were also careful to include a variety of levels of entrepreneurs in this list of contacts. This comprises recent graduates or recent entries into the workplace, who have very little experience in the industry, compared to industry veterans who may have been working as creative entrepreneurs for anything from 10 to 25 years. We also ensured that there was a cross-section of high-earning, well-established professionals who have made a name for themselves in the business, and those who function entirely in the informal economy, and may be on the lower end of the Kenyan pay scale.

In this way we were not limiting our findings to one sub-set of the creative economy, but attempting to be representative of all levels of the creative entrepreneurship scale.

In total, over a period of just over two weeks, we gathered 142 responses to the survey, from Kenyan creative entrepreneurs. In the survey we included one question asking if they were interested in taking part in a paid focus group discussion, to which the vast majority chose 'yes'.

In our communications we insisted that in order to be eligible to take part in the focus group discussion the respondents must first complete the written survey.

This, we believe, encouraged more individuals to complete the survey, with the incentive of being able to take part in the paid focus group discussion. However, it was not the only incentive, as approximately 50 respondents completed the written survey without expressing a strong desire to take part in the focus groups.

This indicates that there is a willingness amongst creative entrepreneurs to participate actively in initiatives for the betterment of the industry that they are a part of.

Following the written survey we then proceeded to the focus groups. These were multidisciplinary focus groups, made up of creative entrepreneurs from a variety of creative industries, as opposed to having any one industry focus. We invited up to 10 creative entrepreneurs to each focus group, scheduled during weekday working hours, and conducted over Zoom.

Participants were informed of all the requirements upfront, and offered a very small token of appreciation in the form of a mobile money cash transfer. In total, three multidisciplinary focus groups were conducted over the period of 10 days, with 13 participants.

Each of the focus groups, conducted via Zoom, were recorded with the participants' permission, and there was an ADMF facilitator (a consultant to the Foundation), and a member of the Foundation team also present as scribe to take detailed notes throughout.

All participants were guaranteed full anonymity and we do not use names or company names in this report. The focus groups covered topics such as business development, access to financing, client behaviour, training, distribution and legal status.

All respondents were open and transparent in their answers and willing to share, which is a huge credit to the creative community. Most participants were keen to remain in contact with their fellow participants after the study, for potential collaboration and networking.

Where possible the focus groups were conducted as open discussions, with open questions that elicited interaction between the participants. Instead of asking, 'do you struggle with X?', the question would more likely be phrased, 'Have you ever attempted X?' and then encouraging participants to share more details about their experiences of X. This was to avoid guiding the respondents to a particular type of answer.



It is only at the end of the focus groups, when we moved to the validation phase of the discussion, that the ideas of the foundation were briefly pitched to respondents for their feedback.

The final phase involved interviews specifically around pay and rates. These were much smaller groups, often one-on-one, and grouped by sector, to be able to create discussion around how rates are set across their particular sector, e.g. photography, animation, or sound engineering.

These were conducted in a similar fashion to the focus groups, except respondents were given the option of writing their answers privately in the Zoom chat function. This is because the subject matter was more sensitive, around pay, rates per gig and overall earnings over the course of a month.

Once again, there was an overwhelming willingness to cooperate, and all respondents were happy to share their personal experiences and challenges with the Foundation for the purposes of this study.

This research phase finished in mid-July 2020, and the entire research phase, from design to closing of the research and starting to write this report took two months, from mid-May 2020 to mid-July 2020. All research was conducted virtually, using Google tools and Zoom, due to the social distancing measures and working from home measures imposed in Kenya due to the COVID-19 global pandemic in this period.





# SUMMARY OF FINDINGS

## Solidarity and collaboration

One of the biggest findings from this study was the willingness of Kenya's creative entrepreneurs to share, to discuss, and to make time to make things better for everyone. At no point did anyone express reticence to answer questions in the focus groups, despite being informed that they could refuse to answer any questions they were uncomfortable with or chose not to answer for any reason.

We were also overwhelmed with many individuals referring us to other creative entrepreneurs who they thought might be willing to take part in the survey. We take this as a true sign of solidarity, and we cannot even begin to fully express our gratitude to all involved. It was also clear that the financial incentive was not the main reason for individuals to take part in the focus group, as the incentive was insignificant compared to what they typically earn from their creative work.

Those who were invited to take part in the focus groups but were unable to make it on the given date offered to make themselves available at another time, or help in another way. We also found a distinct desire for increased sharing and collaboration. As opposed to feeling competition or rivalry, creatives were keen to exchange, and even share

contact details, keep in touch, and explore ways to work together. There was a consensus that collaborations can be fruitful and financially more viable, due to bringing together different skills, contacts, and most importantly financing. There was a notable desire for more opportunities for collaboration and networking.

## The haves and the have-nots

There is a sense, amongst the less-established creative entrepreneurs (those who may have few years of experience, or have had little commercial and financial success) that the creative population is divided into two: those that have made it, and those that have not. They believe that this is due to unfair perpetuation of success: once you get a client, you will have that client for life, and they will refer you to other clients because you have a name and a brand.

In other words: success breeds success. Therefore, they think, when new jobs or clients are up for grabs, the same people will always secure the job, because they have a big name. This is a self-perpetuating cycle, as those who consider themselves the 'have' and 'have nots' think that they will never be a have and that the outcome of their efforts is out of their hands.

At the same time, they admit that they still need more experience, more

technical training, better networks, more guidance on pricing and contacts, and that all of these might help them overcome this division, and become a 'have' themselves. In the same way, they also admit that those who have made it may have better business skills, and know how to market, brand, and position themselves in the market in order to attract more clients and work.

## The Gender Gap

It comes as no surprise that there is a big gender gap in almost all of the data we collected for this survey. We know from our experience of the gender ratio at the Africa Digital Media Institute (where young women account for less than 25% of students), and data from the industry as a whole, that women are vastly under-represented in the digital media and creative technology space.

However, our findings go deeper and highlight other differences between men and women, and the way that they work and study in this space. We will explore this further in the report and present the numbers that illustrate this.

Where possible, we will analyse data as a whole, and then disaggregate by gender. What all of these gender-based findings suggest is that we need to invest particular attention in conducting activities that have a focus on working to involve more women in the digital media space.



### **Thirst for Learning**

In general, all of the respondents we spoke to, however young or old, established or startupper, wanted opportunities for continuous learning. They are conscious that to remain at the top of their technical game they need to engage in ongoing learning, especially as technology evolves and new products require new skills.

There is also a thirst for learning more about business, marketing, and how to sell yourself as a brand. A lack of these skills is widely recognised by participants of this study as being one of the major factors holding creative entrepreneurs back from greater commercial success.

### **The banks don't understand**

When an entrepreneur is starting a small business, one of the first things they may consider is accessing credit, in the form of a bank loan or a SACCO (Savings and Credit Cooperative) loan. Though it is not easy to get a bank loan, and you need to be a registered member to access a SACCO loan, it is considered an option for many small businesses.

For almost all the respondents we spoke to, however, such formal credit and financing options aren't even considered a viable option because banks don't understand or they have such strict requirements we can't meet, therefore options for financing are limited to friends and family.

There is a huge gap in the market for financing to creatives, to finance creative projects such as long-form feature films, photography equipment, and music production.

### **Where do we go when we want to know...?**

There exist a number of professional networks and representative organizations (Photographers Association of Kenya, Creative Society of Kenya, Association of Animation Artistes), and yet still, a number of the young creative entrepreneurs involved in this study do not know they exist, or do not know what value-add these organizations can provide to them. When they struggle with setting rates, interpreting a contract, accessing networking opportunities or learning opportunities, they do not know where to turn.

### **Cashing out**

One of the biggest struggles that Kenyan creative entrepreneurs face is cashing out on the work that they do. Across the board, almost everyone has stories about doing work and not receiving payment as agreed from the client. This is part of the heartache of having their work undervalued and misunderstood, so they find themselves going through a constant rigmarole of having to negotiate down to a price that the client is willing to pay, and then struggling to get the client to pay even at the newly negotiated rate.

### **And now?**

For almost all of the issues raised, a solution was volunteered, which we will explore in this report. All this is to say that whilst much of this report highlights challenges and issues with the current situation of Kenyan creative entrepreneurs, they, and we, offer concrete solutions to these which are all realistic and feasible. We need to work on solid, meaningful partnerships, and pursue change from top to bottom, investing in long-term progress, not short-term fixes.



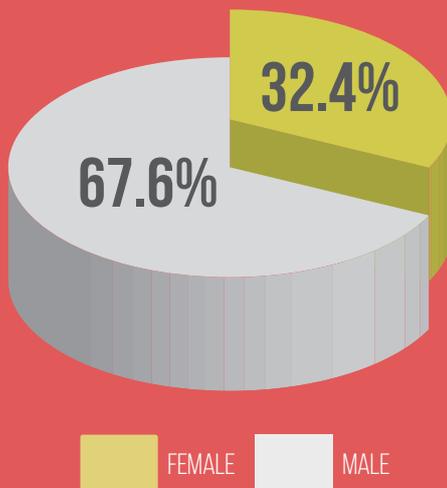
# DETAILED FINDINGS



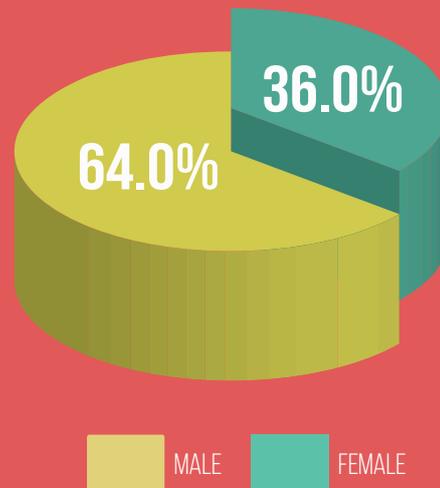
## DEMOGRAPHICS

The average age of all respondents was 32 years of age, with a great variety represented, from 19 years of age up to 62. We were not surprised, but somewhat disappointed, to find that the majority of respondents of both the written survey and the focus groups and interviews were male.

GENDER SPLIT OF SURVEY RESPONDENTS

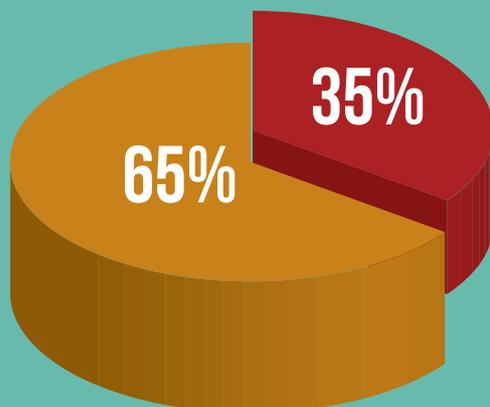


GENDER SPLIT OF FOCUS GROUP & INTERVIEWS



## MARITAL STATUS

When we look at the marital status of respondents, we see that a vast majority (65%) are unmarried, with 65% defining themselves as single.



## MARITAL STATUS



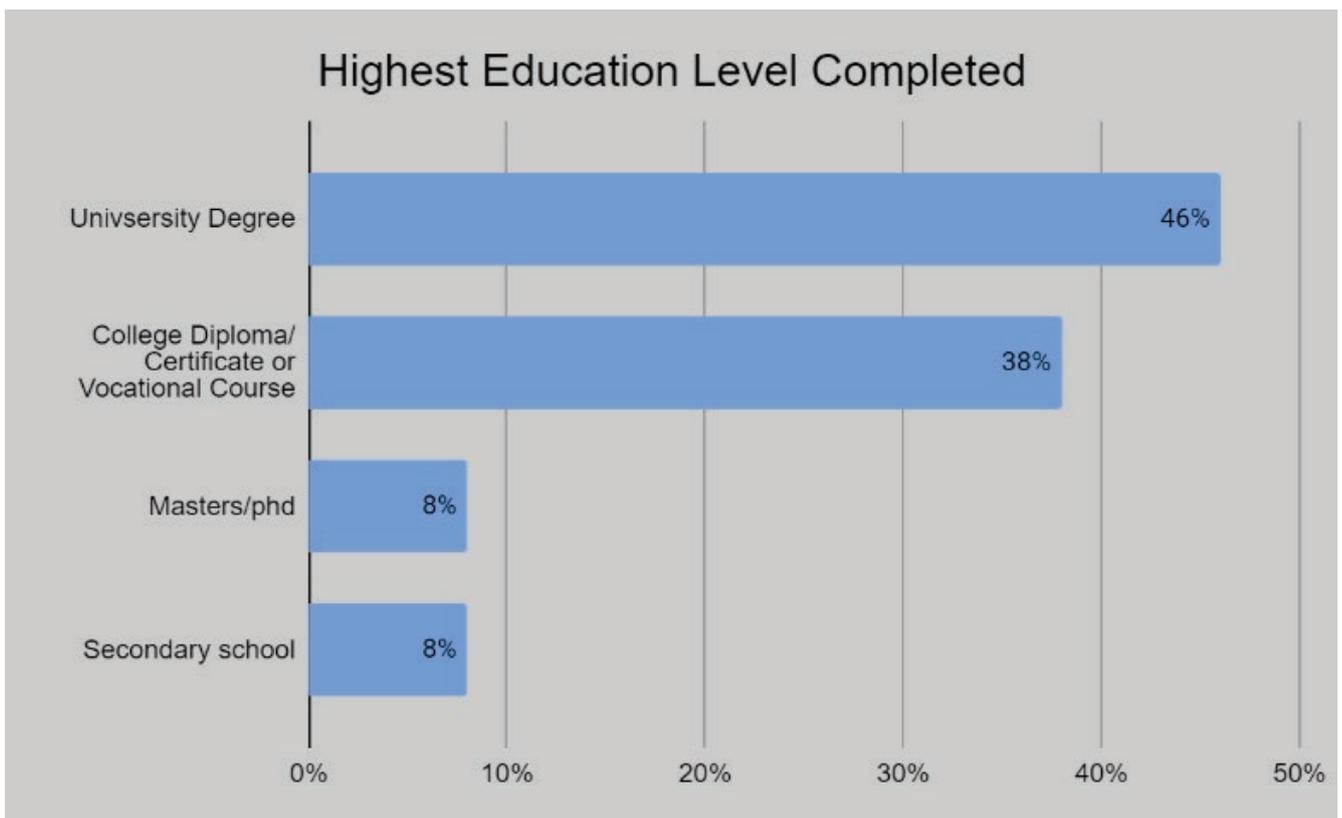
## EDUCATION LEVEL

We asked a direct question to all respondents about their education level. We found that the majority of respondents are highly educated in the formal education space. It is important to note that this does not imply that the education they pursued was necessarily linked to their creative career. However, of those that did specify the subjects that they studied, the majority were in the digital media space.

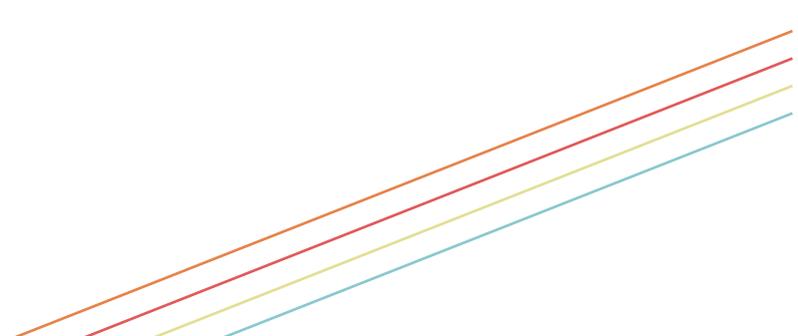


The largest proportion of respondents stated that they had completed a university degree, with an almost equal proportion having completed some form of college or vocational course. A significant number had also completed a Masters degree. The data we collected does not demonstrate whether there is any correlation between education level and income. However, it is clear that there is a high level of education amongst many creative entrepreneurs, and yet they still face many struggles in earning a full income from the vocation that they pursued after their studies.

We will return to this when we look at whether the respondents work full-time, part-time, or have other income generation channels to complement their income.

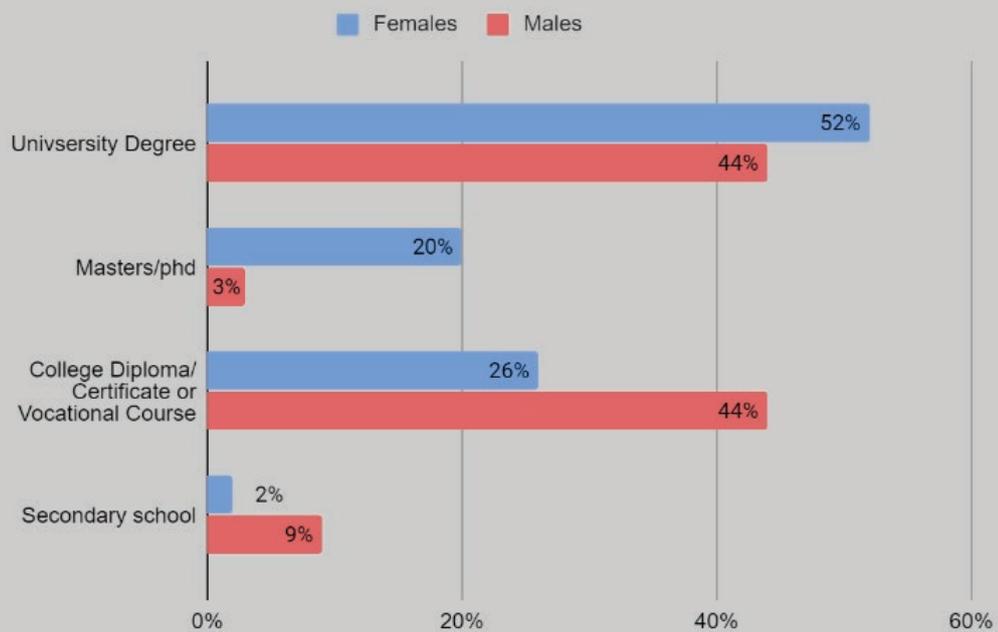


When we disaggregate by gender, we see that women are on average better educated than their male counterparts. Of the female respondents, 52% have completed a university degree, and 20% a Masters degree, compared to 44% and 3% respectively for men.





### Comparison of Education Levels between Males and Females



As we will explore later on in this report, this higher education level amongst women does not necessarily equate to a higher likelihood of having high-spec equipment or software necessary for their work, in fact the opposite is true. This may either indicate that women are not earning as much as men despite having a higher level of discernible education, or that they are less likely to invest in high-spec equipment or software than men. It would be fair to assume that they make different spending choices to men, shown by a Clinton Global Initiative report that demonstrates that when women work they invest 90% of their income into their families, compared to 35% by men).



## CREATIVE SECTOR ENGAGEMENT LEVELS

In this first section of the written survey we also asked about the creative sector that each individual was involved in, referring to both their primary creative sector as well as their secondary creative sector. An overwhelming majority did state a secondary sector, with only 9 out of 141 not stating a secondary sector. Essentially, a creative is unlikely to just limit themselves to one specific sector, and will lend themselves to other activities as they adapt their skills and take up new opportunities as they come their way. They are usually within the same group of activities, for example illustration and animation, jewelry design and furniture design, or graphic design and photography, and are not likely to be substantially different activities, such as graphic design and digital marketing, or photography and sound engineering.

### CREATIVE SECTOR

### PRIMARY ENGAGEMENT

### SECONDARY ENGAGEMENT

CREATIVE SECTOR	PRIMARY ENGAGEMENT	SECONDARY ENGAGEMENT
TV and video production	16%	20%
Writing/Journalism	11%	4%
Graphic designer	10%	8%
Animation	10%	6%
Photographer	9%	10%
Music/Sound engineering	6%	7%
Performer/actor	6%	4%
Digital marketing	4%	4%
Jewelry	1%	1%
Gaming	1%	1%
Fashion	1%	1%
Advertising	1%	0%
Event Planning	1%	1%
Visual Artistry	0%	1%
Other (client service, product designer, creative business trainer, software developer, UI designer)	23%	26%

Whilst disappointing to see such low numbers for a burgeoning field such as gaming, we know that this is still a new sector in Kenya, and there is a growing need for these skills, and a growing number of opportunities. However, the supply has not yet caught up. The most popular sector by far is TV and video production.

We can also look at the primary creative professions by gender, and see a marked difference in the primary professions of men and women. It is clear from this data that the fields of animation and gaming are dominated by men, amongst these respondents, whilst writing and journalism are very much female industries, according to this pool of respondents. This was also reflected in the focus groups, where the writing and journalism group was the only one that featured only women, with all other groups featuring only men, or a vast majority of men. For both genders, TV and video production is almost equally popular.

PRIMARY CREATIVE PROFESSION	MEN	WOMEN
TV and video production	19%	17%
Writing/Journalism	4%	20%
Performer/actor	3%	7%
Photographer	8%	4%
Music/sound engineering	8%	4%
Digital marketing	1%	4%
Fashion	0%	4%
Graphic designer	7%	2%
Events	1%	2%
Advertising	1%	2%
Jewellery	0%	2%
Animation	14%	2%
Gaming	1%	0%
Other (client service, product designer, creative business trainer, software developer, UI designer)	33%	30%



## STATUS

When we shared the written survey with our community, we did not state whether we wanted formal or informal entrepreneurs, registered or unregistered companies, and so we got a veritable mix of all. However, all of them, even those that had some form of paid employment, had one thing in common: they conduct or have conducted independent creative activities, as a freelancer, consultant, or entrepreneur.

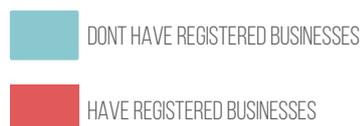
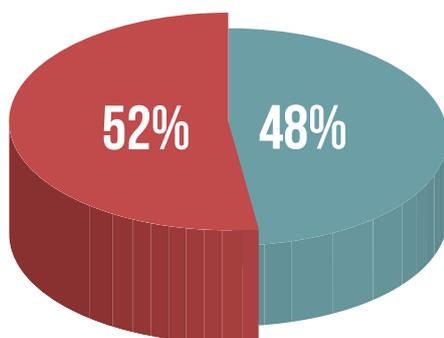
The definitions were all along the spectrum. We found it very interesting that whilst two people could be doing exactly the same activities, they could define themselves differently. Whilst some participants would say they're an entrepreneur, others would say they're freelance, and others even self-employed, or a startup. Some simply stated, 'I'm a photographer/graphic designer/writer', with the status of their activities not factoring into their description. We did not try and influence how they described themselves, but left it open to them to decide how they view themselves. One insightful description from the focus groups:



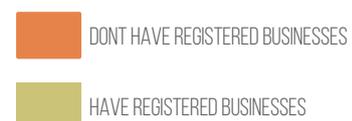
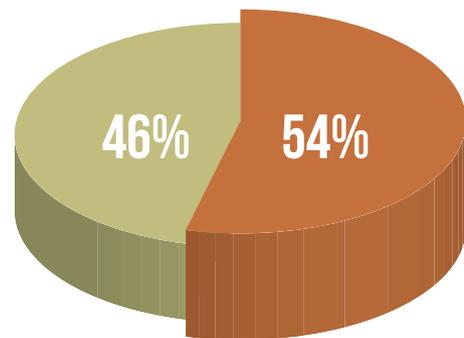
*“I’m self-employed, but sometimes we call ourselves entrepreneurs. It gives you more history, leverage, to say self-employed, but it's just a label, it doesn't necessarily add any value to your business. Often when we say 'self-employed' it's more about ego.”*

When asked whether their business is formally registered, we found an exact 50% split between those that have formally registered their business and those that haven't. When we look at the difference between men and women, we see a slightly higher proportion of men have a registered business than women, but the difference is not substantial.

MEN'S FORMAL STATUS



WOMEN'S FORMAL STATUS



In the focus groups we spent some time discussing why an individual would choose to register a business or not. Most of those who had not registered (around 50% of respondents), were planning on doing it at some point but had seen no need.

They only see it as a need if applying for large corporate gigs, or bidding for formal tenders of services, at which point a registered company, amongst other legal and financial paperwork, is asked for. For many, registering a company opens up a new realm of obligations and rabbit holes that they're not prepared for: tax obligations, filing paperwork on a regular basis, not to mention that it costs money to register a company (currently over KES 10,000/USD 100) and not everyone knows where to start or how to go about it. One young entrepreneur, who does not have a registered business, said:

**"I feel like I would need capital to pay for services and people to then be compliant."**

They therefore prefer to continue doing their work informally, and given the sorts of clients they work for, they have not been obliged to take the step of formalising. As one focus group respondent said,

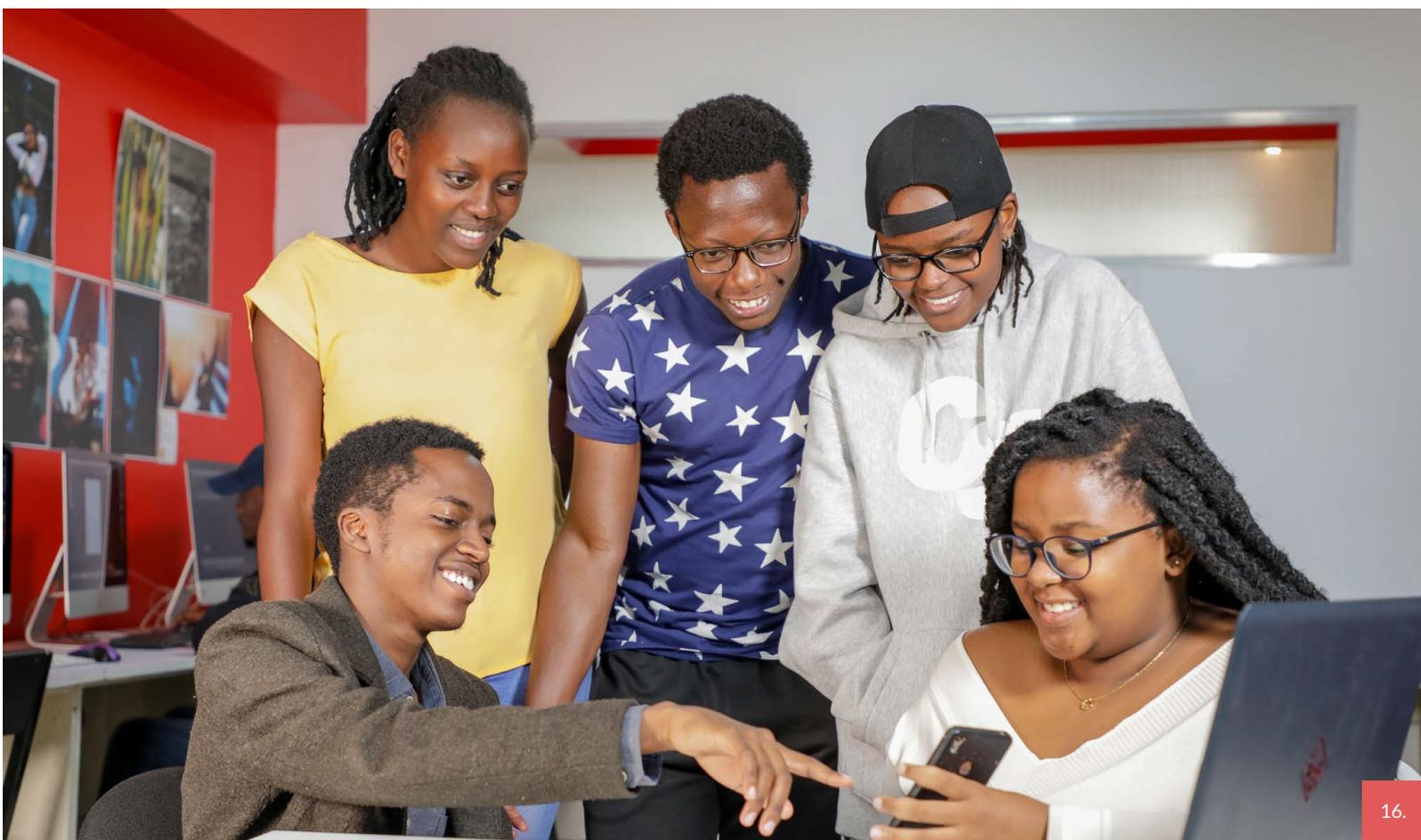
**"Entrepreneurship in the film industry is the hardest mountain to climb. You don't know much, and you don't have anyone to tell you how things are."**

The fact that most of the unregistered individuals state that they do wish to or plan to register at some point but don't know how or why, demonstrates there is an opacity to the process that seems insurmountable to many entrepreneurs.

They do not know how to go about it or where to go to ask. But it also means that they are not paying taxes on their income, and getting benefits such as NHIF and NSSF (National Health Insurance Fund and National Social Security Fund) unless they choose to make individual, independent contributions, which most do not.

In one focus group where the majority of participants had a registered business, the only one who did not have one, shared his position:

**"I've not registered a company, but I want to work on it. But I feel like I would need capital to then employ people, get support services, etc."**





As is to be expected, because many are not registered, they are also not tax compliant, and do not declare all or any of their income. In many cases this is because they would lose some of their income in taxes, which they do not feel they can afford to do. However, another reason is that they do not necessarily see enough of a benefit in registering a business, paying taxes, and accessing the supposed benefits that taxpayers enjoy, such as NHIF and NSSF as mentioned above.

Even the more established creative entrepreneurs who employ staff, or sub-contract work to other creatives explain that they do not always pass their work through 'official' routes because there is not enough of an apparent need. One well-established creative entrepreneur explained:

*"If dealing with an individual, you don't charge VAT, and you don't claim or pay it either. It all depends on the size of the project; if you're dealing with a large corporate, then you'll go through the official route; if it's a small organization or an individual you don't charge, and they'll ask you not to include it".*

Going back to our earlier point about how creatives describe themselves, one individual made a very honest point:

*"I could say I'm an entrepreneur because I registered my company but it's not true. I could say I'm self employed because I've done work for corporates, but it's not true. Sometimes using a label is a tactic, it's self preservation, to position yourself in a certain way. It's about surviving."*

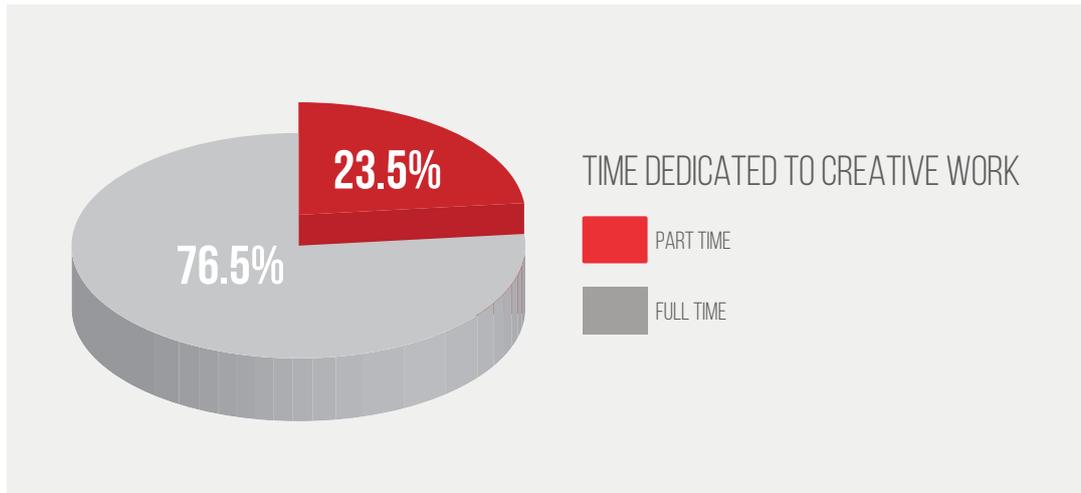
So perhaps the more astute business-minded individuals will register their company, and brand themselves as self-employed or an entrepreneur depending on what they're pitching for. This may help them advance ahead of their peers in the industry, in terms of number of gigs and rate per gig.

## To-do list

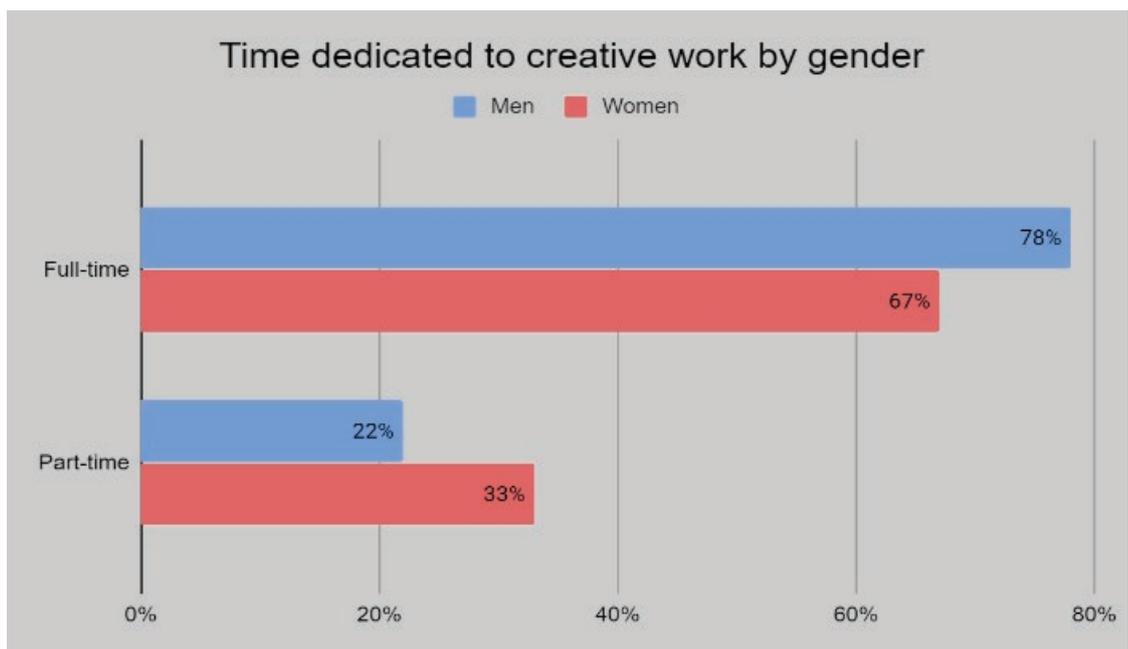
There is a need for clear and on-demand support in registering a business, knowing the process, and being able to ask all the questions in an open and transparent way. There is also a need for business support in developing a clear and personalised value proposition, and market proposition, so that independent creatives are confident in their status, their brand, and how they sell themselves to potential clients.

## TIME DEDICATED TO CREATIVE WORK

In addition to formal status, we also asked about whether they worked full-time on their creative work or not. This was revelatory, as on average 76% are dedicated full-time to their creative work, with 24% working part-time. This is despite many respondents having a secondary source of income (we will return to this later on).



When we look at the difference between male and female respondents, there's a marked difference, with women significantly more likely to dedicate themselves only part-time to their creative work, with only 67% stating that they are full-time creatives, against 78% for men. According to national statistics about gender differences in labour and work commitments, it is safe to assume that for many women, child-bearing, child-rearing, and domestic work in their own house accounts for a significant proportion of their time and may prevent them from pursuing their creative work full-time.

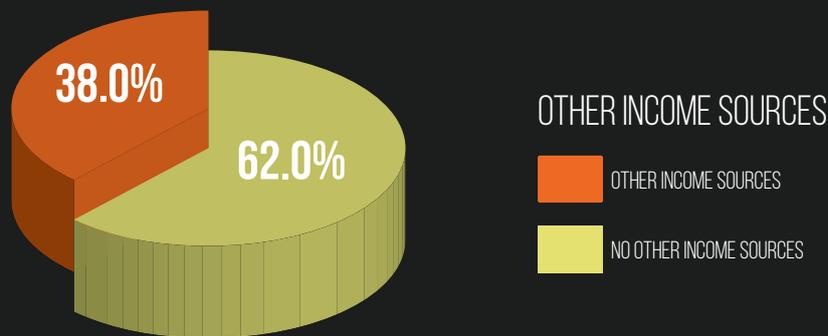


As mentioned above, a significant proportion of the respondents have a secondary source of income, in addition to what they consider to be their creative work. This suggests that a large number cannot earn enough just from their creative work and so need to supplement it with other income, which may be a more reliable and steady source of income. A knock-on effect of this is that they may not be left with sufficient time to dedicate to formalising and growing their creative business, and it risks stagnating at the same sort of lacklustre level until they can dedicate themselves fully to cultivating their business in a more focused and committed way.

## ADDITIONAL SOURCES OF INCOME

It is important to note that the numbers for those that have only one source of income and those that have a secondary source of income (62% and 38%) do not match the numbers of those who work full-time (73%) vs part-time (26%). This indicates that a number of those who have a second income also work full-time on their creative outputs. Though this is in line with the typical Kenyan practice of having a 'side hustle' (or passion project, a small project that you pursue alongside your day job to supplement your income), a side hustle is usually for those who have stable, secure jobs with rigid hours, and then have an activity on the side. In this case though it seems that for many of the respondents, all of their activities are unstable and have flexible hours (farming, teaching, consultancy, etc), on top of their creative work, which is also unstable, with flexible hours.

Of the secondary sources of income that they mentioned, most popular were teaching (7% of all survey respondents), farming, and events equipment hire (both 4% of all respondents), and rental properties and office work (each 3%). As mentioned above, most of these are flexible and not highly dependable as they may depend on external factors, such as availability, seasonal factors, weather, or demand.



### To-do list

It is clear from the opinions expressed by almost all creatives interviewed through the focus groups and interview sessions that they would like and require more work, more projects, and more gigs, in order to earn a full salary that can sustain themselves and their families in the way they would like to. If this were the case, they would be able to dedicate themselves more fully to their creative work, without having to complement their income elsewhere, and they would earn a fair and sustainable salary.

The main opportunities they see in order to achieve this are: more networking opportunities with other creatives, to learn from them, and engage in joint projects that are more viable than solo projects; access to gigs on a fairer and more democratic platform, such as an online gig platform that showcases your portfolio and work to date as opposed to just referrals and recommendations; and greater consumer education on what the creative process entails, so that the client recognises the value of their work and agrees to pay the fair rates that the creative entrepreneur is looking to charge for their work.

This could include a rates guide for different creative industries, indicating guidelines of how to calculate rates, and what is a fair price to pay for different deliverables.

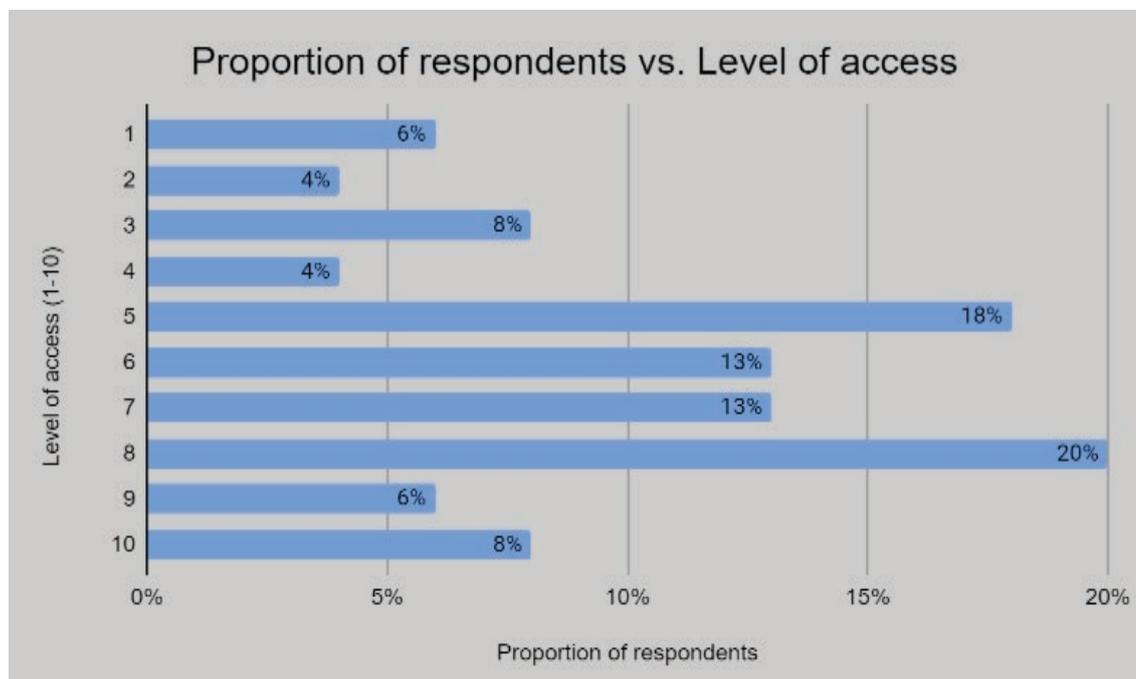
## EQUIPMENT AND SOFTWARE

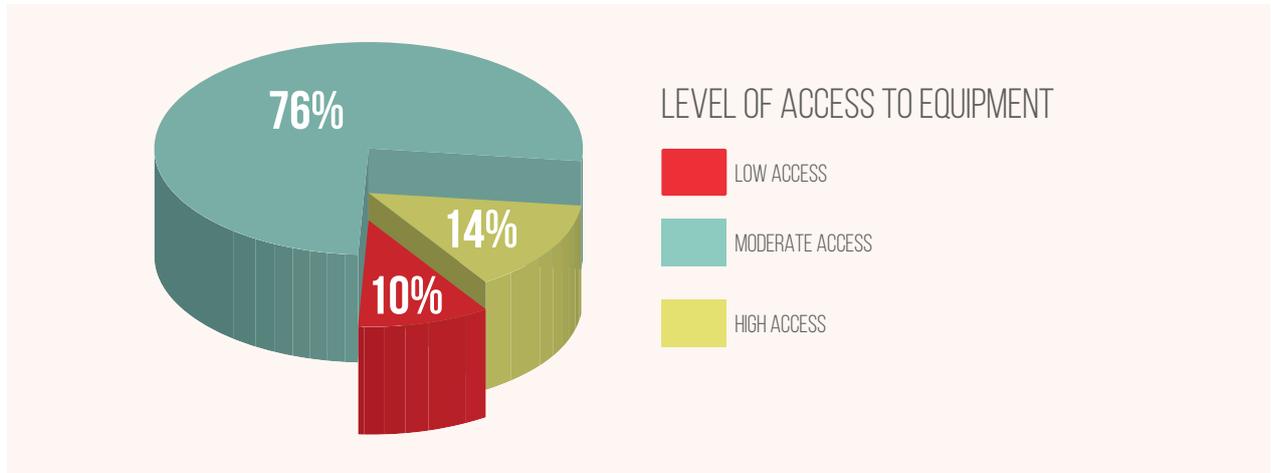
One of the main focuses of the written survey was around access to and ownership of relevant hardware and software for respondents' creative work. This is a major marker of financial freedom of creative entrepreneurs, as much of this software and hardware is relatively costly, but can be vital to be able to produce professional quality cultural products.

A major assessment of this was whether or not individuals owned, or had access to a smartphone or a laptop. Our focus in this study is the digital and creative technology space, covering sectors such as graphic design, film and television production, animation, gaming, and digital media and writing. Therefore, access to or ownership of these tools is a basic requirement to be able to do these activities full-time in an efficient and productive way. Smartphone ownership was almost unanimous (99%), however computer ownership stood significantly lower, at 85%, which rises to 94% when including both ownership and access to (which may mean somebody else in the household owns one that they can use, or they have access to one in their workplace, or a communal space such as a coworking space, studio, or community centre). We can therefore conclude that almost all respondents have access to at least the basic hardware required for some form of digital creative work.

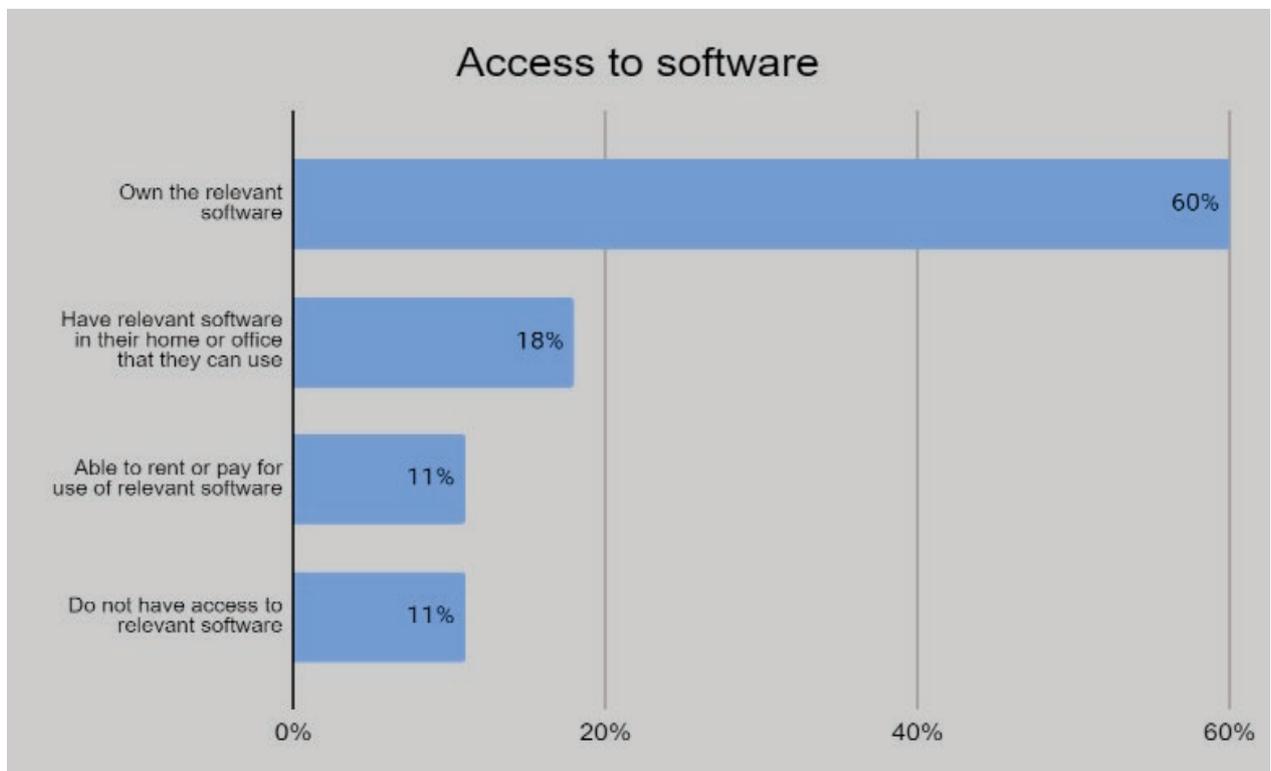


When asked to rank certain statements on a scale of 1-10, we learned that most chose between a 5 and an 8 out of 10, for the statement 'I have access to all the equipment I need to do my job well'. The second most popular option, with almost 20% of respondents answering, was 5 out of 10, which is right in the middle, which confirms what we gleaned in the earlier question about access to software. A majority have some access, but it is far from the majority that have all that they would require to do a good job, in their own eyes, and often they do not own it but have to pay to use it, or borrow it from someone who does own it.





However, when we turn our attention to software, the story is significantly different. Only 60% own what they consider to be the relevant software for their creative work, whilst 18% have access to it in their home or workplace, 11% are able to rent or pay for use of it, and 11% simply have no access at all. As mentioned, we can assume that this is mostly a question of financial means, as much of the specialist software for animation, video editing, game design, and other advanced digital media work, can cost upwards of \$150 for a single licence, and in many cases this needs to be renewed on an annual basis. This is a significant cost, especially for individuals who may not be earning more than \$300 - \$500 a month of highly variable income. It is clear that many more would have access to the relevant software if they could afford it, and financing, or the lack thereof, is a big factor in this.



## ACCESS TO FORMAL FINANCING

Almost all participants in the focus groups clearly stated that they have no access to (or consider themselves to have no access to) formal financing. Almost none of those we interviewed had secured a loan from a bank, and none had had a good experience borrowing from a bank, stating that they could not access a loan from a bank without a stable job and the guarantee that they would be able to pay it back. In addition to this, they would not even be able to offer themselves a guarantee that they would be able to pay it back, indicating that there is not a clear 'input-output' relationship in terms of the return on investment in their creative work. They are not sure whether paying for software or paying to finance a production or product will definitely lead to any income or revenue. For this reason they do not want to take on that risk with a bank where the penalties can be prohibitively high. Instead, it seems that most creative entrepreneurs will pursue informal financing. One focus group participant, a female film producer, gave the following insight:



“No film in Kenya has yet really broken even or made a profit, so it’s difficult to get or take a loan for a film project. Instead, I ask friends, do crowdfunding, or pre-sell tickets, so you owe people a movie instead of money. I prefer not to go to the banks because of the high interest rates.”

Another female creative entrepreneur, involved primarily in film and TV production, adds the following:

“Banks do NOT understand the creative industries. Even if you go with a contract, to take a loan, they just don’t think the industry is viable. They’ll give you a loan for a car, a house, but not for a creative project. Financial institutions should be educated about the creative industry, so they can give us loans, and give us time to pay. They see it as a high-risk industry, they know you might not get paid. Or we come up with institutions just for creative financing. Could the script or project be collateral?”



### To-do list

It is glaringly obvious that there is a gap where creative financing should be. We mean this in more than one sense of the word 'creative': not only should the financing be for creative work, and production of cultural products, but the financing instruments should be creative: allow longer grace periods, for there to be a window for securing a return on investment; use concepts, and production bibles or storyboards as collateral; allow several people to act as guarantors for a joint project. We strongly believe that with the right financing, big, impactful and meaningful creative projects from Africa would be able to take off, and we would not only depend on foreign talent or investment to create exportable cultural products.



## PAYMENTS

It is important to note that the numbers for those that have only one source of income and One of the major challenges that all interviewees and participants cited was payments and rates: setting them and getting them. In Kenya there are no guidelines or rate standards set by any industry body, and there are little to no norms that are informally set and followed by the majority of creatives. In some countries, such as the US and South Africa, these do exist, and can help provide guidance to creative entrepreneurs, especially those who are starting out. These can serve as a baseline for individuals to gauge their experience level, skillset, and investment of time and work, to ensure that they get a fair remuneration for their work.

The focus groups we conducted were made up of a mix of all ages, and levels of experience, and it was refreshing to see that even the well-established creative entrepreneurs were very down-to-earth. They openly discussed the fact that it took them a long time to figure out their pricing, and what they considered their work to be worth in the marketplace. Even so, there is still a lack of awareness and willingness to pay amongst potential clients. A young but experienced graphic designer explained-

***“Sometimes you’ll break even or make a small margin. Design tools aren’t cheap, you see, but clients need proper education about the work that goes into it.”***

Another participant in a separate focus group, an animator with many years of experience in the business, said:

***“Clients sometimes come with unrealistic briefs, even those that may have experience in the industry. They think that animation is cheaper than live action. But it’s a new art form, so it’s on us to show and tell clients.”***

This last point is crucial and points to the locus of control that creative entrepreneurs have. It is not enough to believe that the client does not know enough, or that there are factors working against your success; creatives need to be proactive in countering these beliefs, and in positioning themselves as technically skilled professionals that know and master their trade and are worth the rates that they charge.

There was a general consensus that negotiation is an almost inevitable part of the job. Very few respondents could confidently say that they would not come down at all in their rates. Most are adamant that they can set their rates as they see fit but that they will almost certainly have to engage in negotiation before the client settles on a price they’re willing to pay. One filmmaker puts it bluntly:

***“Africans love to negotiate so they want to feel like they’ve at least cut some cost.”***

It is only a handful of veteran entrepreneurs who have the confidence and, one could say, the luxury,



of refusing to negotiate. After several years it is common to have built up a strong enough phone book of clients, and enough experience to be able to stick to a pricing that you value yourself at and not budge. This may even be to the extent of losing a gig or project if the client does not agree to the terms. In the words of one young graphic designer:

***“Most of the work I get is through referrals. I don’t give them an option, they have to match up to my rates.”***

This is clearly very different to less established creatives, who do not have such confidence, and fear that if they do not come down on their prices upon a potential client’s request, they will lose that gig, and valuable, much-needed income. One young up-and-coming sound engineer explains:

***“People assume a lack of experience. They see my portfolio and see I have talent but not experience, and so most times people aren’t willing to pay what I charge.”***

As is very typical for creative entrepreneurs who are at the very beginning of their careers, this sound engineer agrees to do pro-bono (in other words free) work in order to build out a portfolio, attract attention, and show potential clients what he’s capable of. This can be an expensive and exhausting way to build out a portfolio, and can perpetuate the idea that creative work can be sourced for a low cost or for free, whilst still meeting the highest possible standards of quality.

Once the rates are agreed upon, the challenge is not over. The next hurdle is ‘getting’ the payments. One female producer put it well:

***“I started off naive, I thought when people said they would pay, they would. I worked a lot on the promise of payment for three years. So I had to come up with policies, for myself. We consider ourselves to be small businesses, so we don’t think we have leverage.”***

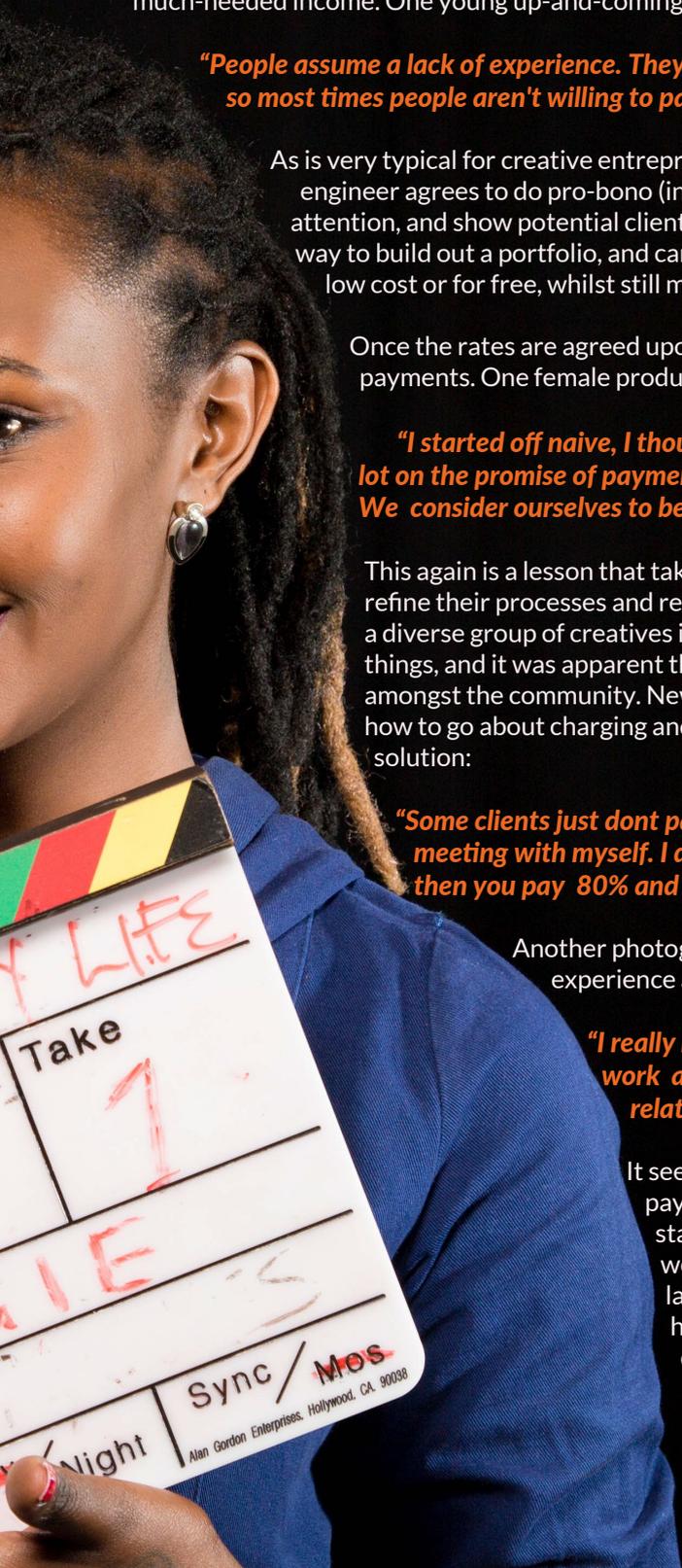
This again is a lesson that takes each individual several years to learn, before they are able to refine their processes and requirements, and how they interact with the client. Simply having a diverse group of creatives in one focus group exposed individuals to different ways of doing things, and it was apparent that this was not something that was openly talked about amongst the community. New or young entrepreneurs struggle to find help or guidance in how to go about charging and asking for payments. A young photographer explained his solution:

***“Some clients just don’t pay and then don’t pick up the phone. So I had to have a meeting with myself. I decided to enter into an 80% contract: I show you what I do, then you pay 80% and I will come and do the work.”***

Another photographer in his focus group, who had several more years of experience and a greater number of clients than him, reacted:

***“I really like the 80% down payment rule. People don’t value your work and don’t pay up, but then you still want to maintain good relationships in the industry.”***

It seemed that a general consensus was to agree on up to a 50% down payment, that way you do not pay out of pocket for production or startup costs for a project. However, those who had experience working with large corporates explained that when working with large companies it was often difficult or impossible to secure this downpayment, and so work would have to be done ‘on credit’.



## To-do list

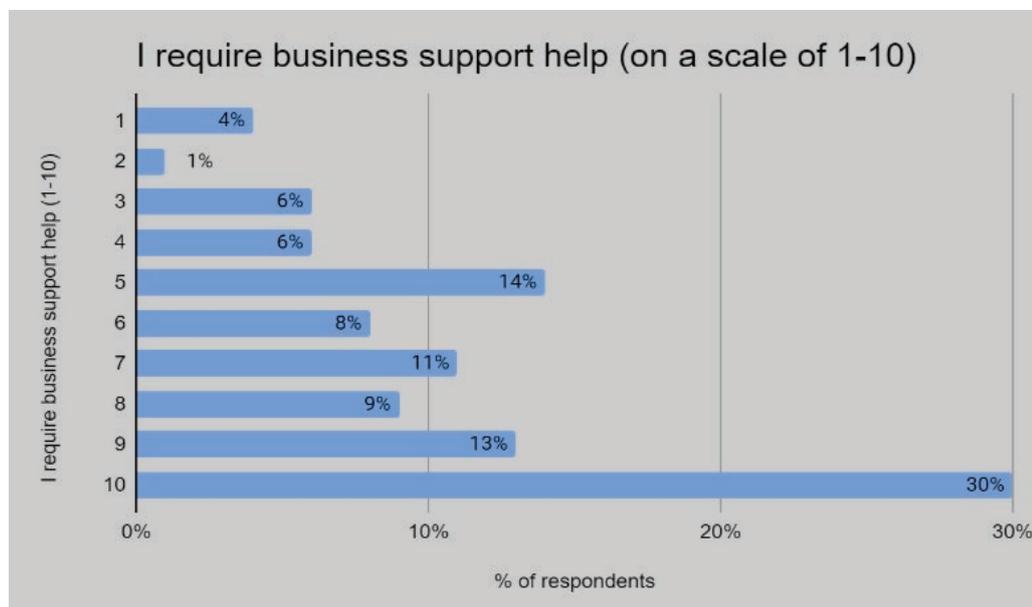
Almost unanimously, the respondents in each group cried out for rate card guidance, that would help everyone across the industry, including the creatives, but also the clients. In some countries, these do exist, and they are respected, second to a legal minimum wage (for the most part). This should be available to everyone to consult online, to refer to, and share with others. They also suggested guidance on contracts, payment processes and invoicing, to avoid the dreaded 'no payment' situations that almost all find themselves in at some point, and to shorten the learning period for entrepreneurs to define their policies and not feel taken advantage of.

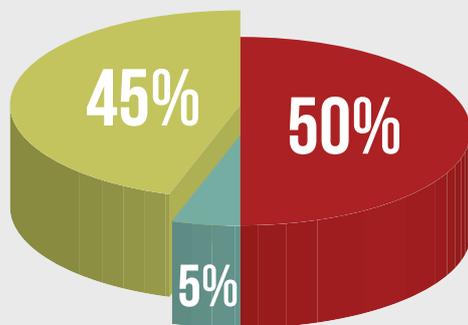
## BUSINESS DEVELOPMENT AND POSITIONING

We mentioned in the introduction that there is a general trend of 'it's who you know' across much of the creative industry. It was therefore no surprise that most of the respondents answered that most of their work comes from referrals. This means that when you're first starting out in your career you need to start from zero, and build up your network of referrals. This starts from one client, who might refer you to another one, and that one might refer you to another one or two, and if you're diligent then after some time you will have some semblance of a steady stream of potential clients. However, this is never as steady as would be desired, and often leads to hefty fluctuations in workloads. Some months may bring in zero shillings, and other months bring in enough to pay bills and expenses for six months (if they all pay on time and in full that is).

Though referrals account for the majority of work secured (one individual claimed it was on average 80% of all work secured), most creative entrepreneurs will also explore other forms of business development. This may include applying for tenders, pitching their work to distribution companies or agencies, tapping into their networks, and using social media to showcase their work. However, very few could go into depth about how exactly they market their work and position themselves in the market, which could explain why referrals are the most successful form of business development by default, and they become reliant on this. Essentially, they let their work speak for itself.

An issue that we see emerging here is a need for business support, especially when it comes to marketing and positioning, in addition to the rates and payment processes mentioned in the previous section. When asked if they require business support help, for things like financial management, getting customers, customer service and communications skills, we saw that the largest proportion of respondents, by far, answered 10 out of 10, demonstrating the clear and acknowledged need for business support services.





## NEED FOR BUSINESS SUPPORT



This was not just the answer given by new entrants into the creative economy. The focus groups demonstrated that all creatives feel that they require support to continuously hone their trade, and build on both their technical and soft skills. It is much easier to pursue ongoing learning for your technical skills than the soft skills mentioned above, such as customer service, getting customers, and financial management. However good you are at your craft these skills are absolutely vital to be able to succeed in the industry, and all participants and respondents in this study appear to be aware of this. However, they do not have any options known or accessible to them that can help them access such learning opportunities.

There was also a big call for more opportunities to network and collaborate, and this was seen as one way to overcome the lack of a sustainable flow of work, and also access to financing. With several people collaborating on a project it is easier to raise funds from a wider circle of people, and it can also allow entrepreneurs to share gigs and contacts leading to more work for everyone.

### To-do list

There is strong demand for continuous learning opportunities around the softer, business-related skills which are harder to gain through traditional learning institutions. Along with this, opportunities for networking and collaboration would go a long way to getting more projects, and more ambitious projects, off the ground.



# A TO-DO LIST FOR THE INDUSTRY

All of the findings that we have detailed above are based on real thoughts from the ground, and we would be doing a disservice to the creative community to ignore them. Instead, we want their opinions and suggestions to carry more weight than the prescriptive or presumptive conclusions that we may find elsewhere. We have therefore compiled a to-do list, for ourselves, and for other stakeholders in the creative community, such as hubs, coworking spaces, incubators and accelerators, industry representative bodies, and funders.



## WE WANT TO LEARN

Creatives want to continue to learn, throughout their career. This extends to both technical skills (new techniques, new tools), but also soft skills, such as business development, client services, and financial management.

There is strong willingness to pay for such trainings, as long as there is clear value for money in the form of highly skilled trainers, and hands-on experience or individualised guidance.

Despite the shift to online learning, there is a preference for having these sessions in-person, and this also has the added benefit of providing the opportunity to engage in traditional in-person networking.

## WE WANT FINANCING

Creative financing that is accessible and affordable to creative entrepreneurs would plug a big gap that needs to be filled with innovative and fresh creative content. This would provide funding for equipment, software, and production costs that are out of reach for most small or new creative entrepreneurs with their monthly incomes. This would be vital in growing their potential and their income.

In addition to financing, access to hardware and software, and studio or production space would go a long way to facilitating large scale cultural product outputs.

## WE WANT TO KNOW...

How much should I charge? How much could I charge? What is my time worth? These are not easy questions to answer, and getting

clear and free, open guidance on these questions, specific to each industry, will alleviate a lot of the uncertainty that creatives face, especially when starting out. Having well-publicised sources of rate guidance would also help to guide clients when they are budgeting, and bolster the credibility of a creative when they quote a certain rate.

In addition to this, a similar resource providing help with contracting, invoicing, and payment management, including free templates and helpful hints (in addition to the training mentioned above) would be a great help to creative entrepreneurs in increasing their productivity and their growth.



## WE WANT MORE WORK

Instead of only relying on referrals and recommendations, we heard a need for a gig platform and additional opportunities for in-person networking and exchange of ideas, leading to additional collaboration and new projects coming to life.

The gig platform would be an Airbnb for creatives, where creatives can apply for a gig, or clients can reach out to potential creative entrepreneurs. There would be price guidance, and an escrow system whereby payments would be made in advance and remitted to the creative entrepreneur upon verified completion of agreed deliverables.

Networking opportunities might be in a physical space, online, or in a collaborative workspace that is open to creatives from all different disciplines.

## WE WANT THE WORLD TO KNOW...

Much as the creative entrepreneurs themselves hold a lot of the power to sell themselves, market themselves, and show the quality of their work, their potential clients can also be educated. In turn they would be more aware of the vast amounts of work involved in producing what looks like a simple product, and of the rates that would be reasonable to pay for such work.

Potential gig clients can also access indicative rate cards, and contract and invoice templates, so there is shared knowledge but also shared accountability and responsibility.

# WHAT NEXT?

As the Africa Digital Media Foundation, we are overwhelmed with the validation we find in the results of this study. Much of what we aim to do over the next three years responds directly to the needs expressed in this report. Our only hope is that it is not just us that will pursue such solutions to the obvious needs of the creative community. We want others to join us in our mission to create jobs for youth in Africa's creative economy, and this is an open invitation for all stakeholders to use these findings to inform their own plans and to shape the solutions and support that they also propose to this community.

Whilst the solidarity and vibrancy of this community of creative entrepreneurs across Kenya has truly shone through this study, it is also a very grounding experience for the Foundation. There are still many issues facing the entire community of creative entrepreneurs. There is great talent, but it is not being reflected in how much they are earning and how much they are being valued by potential clients, and by the economy as a whole. We hope to provide solutions that change this, so that gradually over time the creative economy, and the talented individuals that it is made up of, will be valued in the way that they deserve.



# ANNEXES

## ANNEX 1: WRITTEN SURVEY

*The blurb sent to potential respondents:*

The Africa Digital Media Foundation is carrying out a **nationwide study on the creative economy**, with a focus on **the individuals** whose livelihoods depend on the creation of digital or artistic content.

This study will be carried out by the **Africa Digital Media Foundation**, to provide the empirical proof and evidence of what **Kenya's creative sector entrepreneurs** (both formal and informal) need to **increase their earnings, their skill set, and improve the quality of their creative work and their jobs**. We want our work to answer directly to the needs of the creatives we aim to support, and not be based on assumptions or the interests of others.

No such study has been carried out, with results shared with the general public, to confidently state what these creatives need, and to inform funding, advocacy and resource mobilisation in their favour. The study will be carried out through **focus group discussions** as well as **written surveys**, and will result in a written report to be shared publicly by the Africa Digital Media Foundation. The findings will then shape the content of programs to be provided to Kenya's Informal Creative Sector throughout 2020 and 2021 by the Foundation.

I'm reaching out to you to invite you to take part in the study, in any of three ways:

1. **Complete the short survey** (not more than 5-10 minutes) on your computer or smartphone: <https://forms.gle/VPhDfscRF5kE8Wqa6>
2. Take part in a **paid, online focus group discussion**, with other like-minded creative entrepreneurs and freelancers. To do so, please complete the above survey and then select 'yes' when asked if you would like to take part in the focus group discussion, and leave your contact details.
3. **Recommend** your colleagues, friends or peers to take part in the study. If you know of fellow creatives in any of the following fields, please share their contact details with us by email, so that we can also invite them to take part, or you can forward this email to them:
  - a. TV and film (include advertising, performing arts, videography)
  - b. Music, sound and radio (include sound engineering, recording artists and performing artists)
  - c. Animation and gaming
  - d. Journalism and multimedia (blogging, journalism, digital marketing)
  - e. Visual arts (include photography, graphic design, printing)



The written survey, shared and filled on Google forms:



## Kenya's Creative Economy Survey - Africa Digital Media Foundation

The Africa Digital Media Foundation mobilises skills, financing and policy changes to create jobs for youth in Africa's creative economy. This survey is part of a nationwide study conducted by the foundation, to identify the challenges, needs and strengths of the creative economy. If you are a creative entrepreneur, or an aspiring creative entrepreneur, please share your experiences and thoughts with us on this survey. All responses are anonymous. It should not take more than 10 minutes, and we will share the final report with you if you share your email address with us at the end.

Thank you for your time.

\* Required

1. Please state your full name \*

Your answer

2. Please state your age, in whole numbers, e.g. 21 \*

Your answer

3. Please select the gender that best corresponds to you \*

Male

Female

Prefer not to say

Other: \_\_\_\_\_

4. Please select the marital status which best describes your current situation \*

- Single
- Married
- Divorced
- Widowed
- Prefer not to say

Next

Page 1 of 5

### Equipment

5. Please select the option that best describes whether you own or have access to a smartphone (able to access internet and apps) \*

- I own a smartphone
- There is a smartphone in my household or office that I can use
- I am able to rent/pay for use of a smartphone
- I do not have access to a smartphone

6. Please select the option that best describes whether you own or have access to a laptop or computer \*

- I own a laptop or computer
- There is a laptop or computer in my household or office that I can use
- I am able to rent/pay for use of a laptop or computer
- I do not have access to a laptop or computer

7. Please select the option that best describes whether you own or have access to relevant software for your creative work \*

- I own the relevant software
- There is relevant software in my household or office that I can use
- I am able to rent/pay for use of the relevant software
- I do not have access to relevant software that I need for my creative work

8. Is there software that you would require access to for your creative work, and do not? \*

- I have access to all software I require
- I have access to some software but not all software I require
- I have access to no software I require

## Education and work

9. Please select the highest level of education you have completed (e.g. if you have completed secondary school and then a college/vocational course, select 'College/vocation course' as that is the highest level you have achieved) \*

- Primary school
- Secondary school
- College/vocational course
- University
- Masters/Phd

10. Please state your primary creative profession (e.g. photographer, graphic designer, videographer, radio producer...) \*

Your answer

---

11. Please state your secondary creative profession (e.g. photographer, graphic designer, videographer, radio producer...) if applicable \*

Your answer

---

12. Please select the definition which best describes how much time you dedicate to your creative work \*

- Full-time
- Part-time
- Only occasionally
- Other: \_\_\_\_\_

13. Please state any specific education, courses, diplomas, or training sessions you have completed that are specific to your current profession (state institution/college, and level of qualification received, if any). If none, please state 'N/A' \*

Your answer

---

14. Do you have a registered business for your creative work? \*

Yes

No

15. Do you have other income sources, outside of your creative work? \*

Yes

No

16. If yes, please state what other income sources you have, outside of your creative profession (e.g. rental income from property, teaching, manual labour, etc). If no, please state 'N/A' \*

Your answer \_\_\_\_\_

Back

Next

Page 3 of 5

Please rate the following on a scale of 1-10, 1 being the lowest, 10 being the highest

17. I have access to all the equipment I need to do my job well (1 being I have very poor access to equipment, 10 being I have all the equipment I need) \*

1 2 3 4 5 6 7 8 9 10

I have very poor access to  
equipment



I have all the equipment I  
need

18. Please explain in a few words whether you own, rent, or borrow this equipment, and what equipment it is. \*

Your answer

---

19. I have access to all the software I need to do my job well (1 being I have very poor access to software, 10 being I have all the software I need) \*

1 2 3 4 5 6 7 8 9 10

I have very poor access to software



I have all the software I need

20. Please explain in a few words whether you own, rent, or borrow this software, and what software it is \*

Your answer

---

21. I require business support help, for things like financial management, getting customers, customer service and communications skills (1 being I do not require any help, 10 being I require a lot of help) \*

1 2 3 4 5 6 7 8 9 10

I do not require any help



I require a lot of help

22. I would be happy to pay for a short training course to receive support for financial management, getting customers, customer service, and communications skills (1 being I would not be happy to pay, 10 being I would be very happy to pay) \*

1 2 3 4 5 6 7 8 9 10

I would not be willing to pay at all            I would be very happy to pay

23. I would be interested in taking part in this short training course over the phone or on video calls (1 being I would not be interested, 10 being I would be very interested) \*

1 2 3 4 5 6 7 8 9 10

I would not be interested at all, it would have to be in person           I would be very interested in these phone or video calls

Back

Next

Page 4 of 5

Never submit passwords through Google Forms.

### One final thing

Would you be willing to take part in an in-depth focus group via mobile phone video call to explore these topics further? \*

- Yes
- No
- I would like to find out more before deciding

If yes, please state your name and phone number below (e.g Patrick Mwangi, 0792745373), if no, please state 'N/A' \*

Your answer

Would you like to receive more information and findings from this survey, which will lead to activities and opportunities for creative entrepreneurs in Kenya? \*

- Yes
- No

If yes, please state your name, and phone number below (e.g Patrick Mwangi, 0792745373), if no, please state 'N/A' \*

Your answer

If yes, please state your email address below. If no, please state 'N/A' \*

Your answer

If yes, please state your email address below. If no, please state 'N/A' \*

Your answer

Back

Submit

Page 5 of 5

## ANNEX 2 : FOCUS GROUP DISCUSSION QUESTIONS

*The list and order of questions asked in the mixed sector focus group discussions*

Question number	Question
<i>Background</i>	
1	Do you practice your creative work full-time?
1a	If not, what is stopping you?
2	How do you get customers and secure gigs/work?
3	Do you collaborate with other creatives in your work?
3a	If so, what is the advantage of this?
4	What is the role of formal clients or intermediaries, such as event planners or ad agencies in generating business?, what is stopping you?
<i>Payments and financing</i>	
5	What payment arrangements do you have for your clients? E.g. instalments, deposits, subscription, retainers, etc.
6	How do you resource a gig, ie. finance, equipment, talent, transport? If it is a graphic designer where do they get the printer and what are the payment terms? If a photographer, how do they print or where do they buy DVDs?
7	Do you have access to credit?
8	What are the terms of the credit you can access?
9	If you do not have access to credit, what are the main barriers, and alternatives?
10	Have you ever tried to access commercial financing for your business/work?
10a	If not, why not?
10b	If so, what happened, were you successful?

### *Payments and financing*

11	What would you require to be able to access financing for your business?
12	What is your average rate per gig and how many gigs do they get a month?
13	What is the typical way you get paid (installments, mode)?
14	How do you collect and what is your track record on collection?
15	What barriers do you face in earning more from your creative work?
16	Which is the BIGGEST barrier of all of these?

### *Status*

17	Do you see yourself as a 'creative' as a 'hustler', as 'self-employed', as 'unemployed', as an 'employee'? How would YOU define your status?
17a	If you've never thought about this, why is it/is it not important to define this?
18	How many years have you been working in the creative sector and do you feel anything has changed in that time?
19	Is your business registered?
19a	If not, what prevents you from registering as a business? Would you like to register as a formal business? Why or why not?
19b	Do you file tax returns (are they up to date?), have a pin, keep financial records?

*Professional development*

20	What made you get into this creative work? History, inheriting skills/equipment, need, etc.
21	Would you be interested in accessing training opportunities to help you grow your business and your work?
22	What would you be most interested in covering in a training course to help you maximise your income from your creative work? e.g. business skills, financial management skills, business development skills, customer service skills, technical skills for graphic design/photography/film production
23	Would you be interested in doing this online or in-person?
23a	What would be the barriers for each?
24	What sort of training program would be of most use to you? (frequency, duration, who is teaching, etc.)
25	Would you be willing to pay for this training? And ideal price range
26	Would you be interested in a gig platform where you can find gig opportunities and apply for them directly online?
26a	What features would you want to see on such a platform?
27	Would you be interested in an online content distribution platform?
27a	What features would you want to see on such a platform?

## ANNEX 3: PAY AND RATES INTERVIEWS

*The list and order of questions asked in the mixed sector focus group discussions*

1	How confident do you feel in setting your rates?
2	What are some of the challenges you find?
3	Where do you go for benchmarking?
4	How do you calculate your rate?
5	What is your average rate per 'gig'?
6	How much do you make in an average month?
7	And in a bad month?
8	And a good month?
9	What would help you to better decide your rates?
10	Extra:



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