COMMUNICATIONS AUTHORITY OF KENYA

AUDIENCE MEASUREMENT AND INDUSTRY TRENDS REPORT QUARTER 2 FY 2023-2024

(October-December 2023)

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1. INTRODUCTION

Kenya boasts of a media landscape renowned for its diversity and sophistication. The radio sector is thriving, with an impressive array of over 100 radio stations, many of which cater to a variety of local languages. The transition to digital terrestrial television transmission in 2015 significantly expanded the television station count. Additionally, Kenya's remarkable proliferation of mobile phones has contributed to one of the highest internet penetration rates in Africa. However, the dynamism of Kenya's media scene poses challenges in capturing and retaining broad audience engagement within a fiercely competitive market.

In such a vibrant and rapidly evolving media landscape as Kenya's, the need for research becomes increasingly evident. Research is a vital tool for media organizations, policymakers, and stakeholders to navigate the intricate dynamics of this sector. It enables us to gain a deeper understanding of audience preferences, emerging trends, and the impact of various media platforms. Through comprehensive research, we can identify untapped opportunities, assess the effectiveness of content strategies, and refine our approaches for audience engagement. Moreover, research provides critical insights into the ever-changing technological landscape, helping media entities adapt to new communication channels and digital advancements. In a competitive market, where staying relevant is paramount, investing in research is not just advantageous but a strategic imperative to ensure the sustainability and growth of the media industry in Kenya.

2. MEDIA AUDIENCE MEASUREMENT

2.1. Ways in Which Media is Consumed

The consumption patterns stayed steady in Q1 2023/24 and Q2 2023/24. Traditional radio sets remain the main medium for radio consumption, while mobile phones contribute significantly, making up about one-third of radio listenership. Television viewership is primarily through television sets. Social media consumption is also high and accessed using the mobile phones. Overall, these findings emphasize the diverse and interconnected ways through which individuals engage with various media platforms in contemporary society.
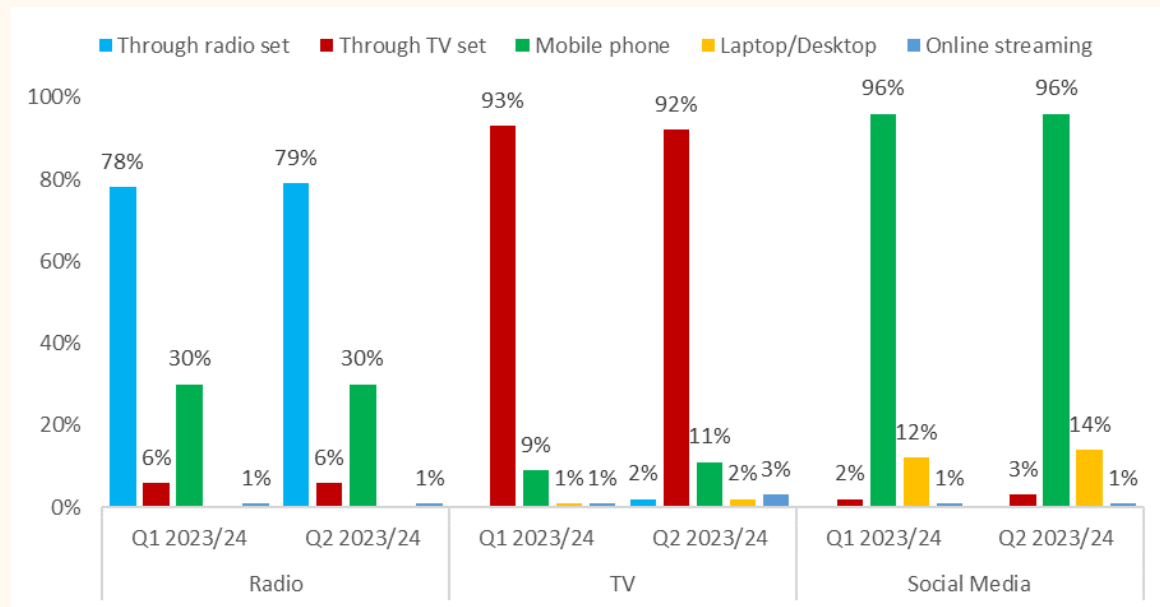
Figure 1: Ways in which media is consumed by total

2.2. Place of Media Consumption

The location of media consumption shows no notable variance between Q1 2023/24 and Q2 2023/24. Home continues to be the main location for media engagement, with 87% and 88% of individuals partaking in this activity during Q1 2023/24 and Q2 2023/24, respectively. In this setting, radio holds a slight advantage over television. Additionally, media consumption is observed in the workplace, with radio being the preferred choice. Social venues such as bars, restaurants, and hotels demonstrate a preference for TV content.
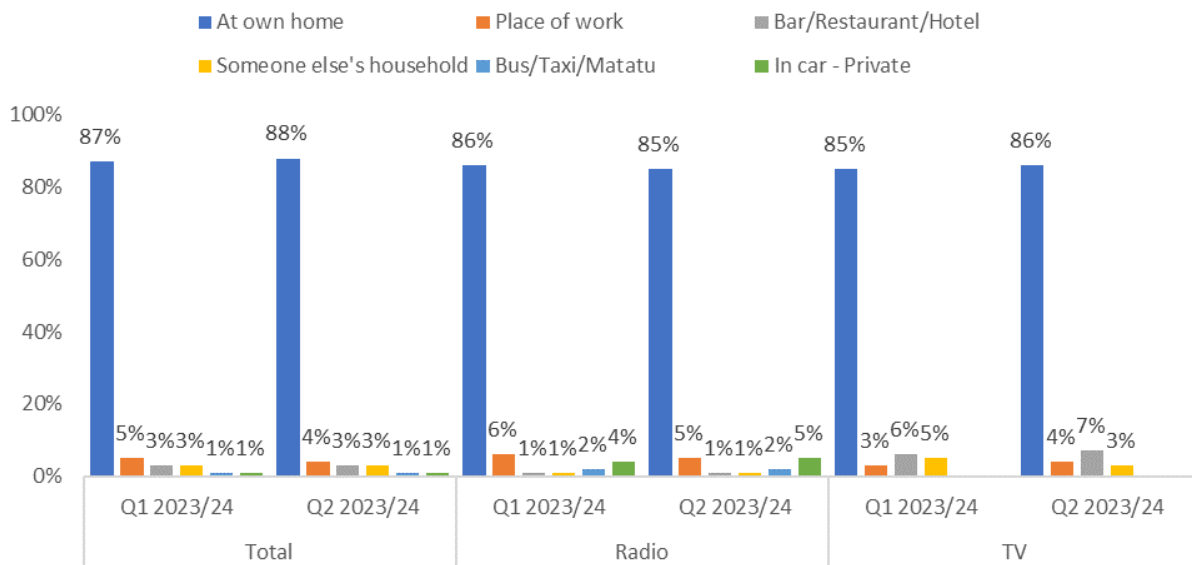
Figure 2: Place of media consumption by total

2.3. Access and usage of traditional media & digital media

Radio and TV have the highest mentions for activities engaged in by over 70% of respondents. A review of the current and previous quarter shows that there has been a
modest changes in engagement for radio, television, and the internet. There was a slight decline in newspaper reading, but magazine reading showed an increase during this period.
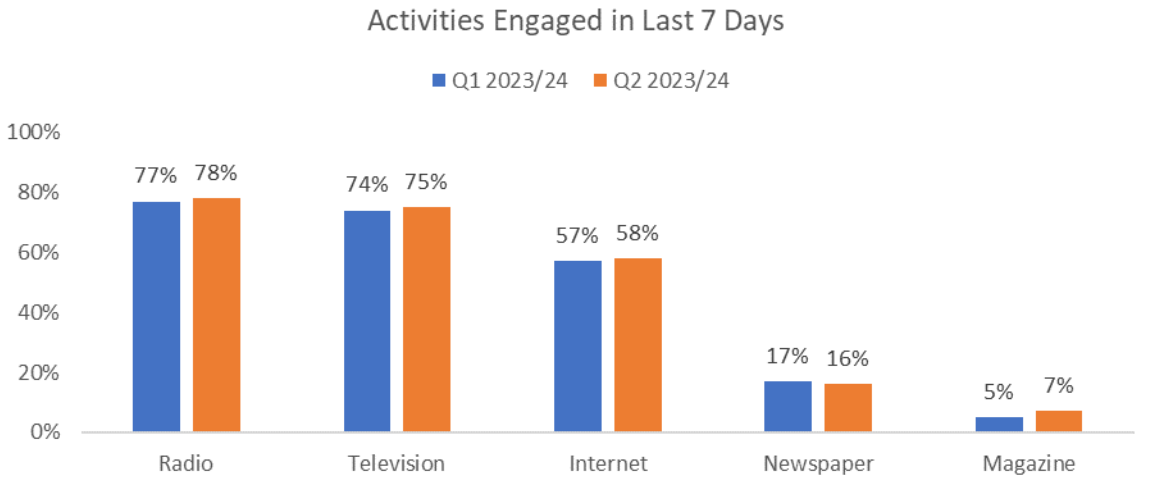
Figure 3: Activities engaged in the last 7 days

The results show a gender-based disparity with a higher media consumption rate among male respondents for radio, TV, internet newspaper and magazine. Age-wise, the 45+ age group demonstrated the highest engagement in radio and newspaper activities, while the 35-44 age group exhibited the highest television and magazine consumption. While 18-24 years are engaged more in internet usage.
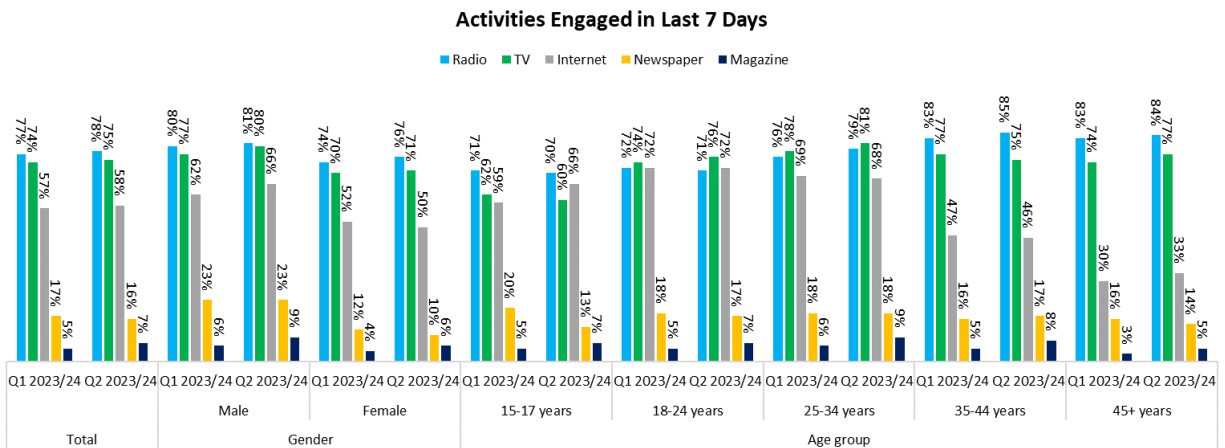
Figure 4: Activities Engaged in Last 7 Days - by total, gender & age

Radio is more popular in rural areas and amongst those in the LSM 1 to 4 segment. Television consumption was prominent in urban areas (82%) and among higher LSM categories (87%) in LSM 8 to 11 and (95%) in LSM 12+, while internet usage is greater in urban settings (76%) and higher LSM categories LSM 12+ (97%).
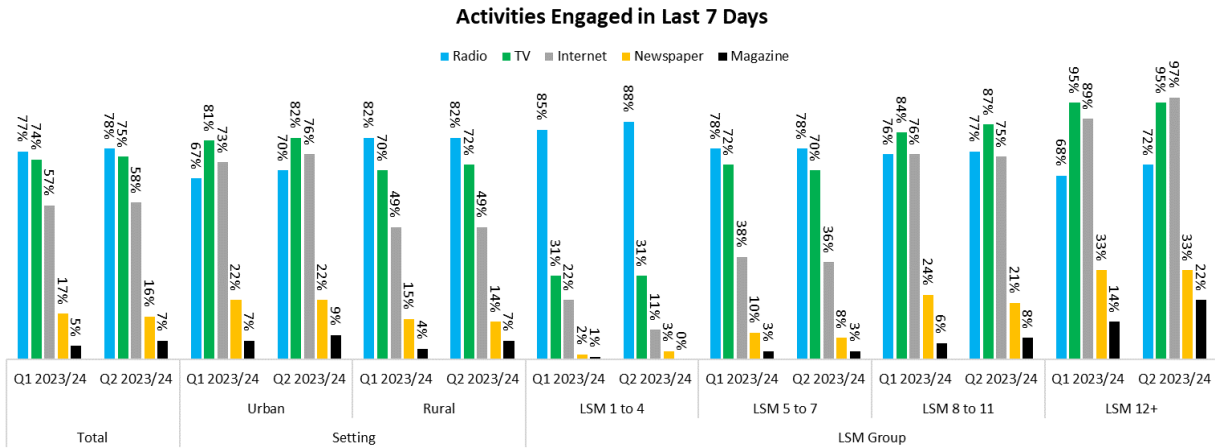
Figure 5: Activities Engaged in Last 7 Days - by total, setting & LSM

The highest radio listenership is recorded in Western (85%) and Rift (82%) regions. Central (87%) and Nairobi (81%) regions exhibit notably high television consumption, whereas internet usage prevails in Nairobi, reaching 83%. When it comes to reading newspapers, there are regional disparities, with the South Nyanza region having the lowest participation at 7%, while Nairobi leads with 21%.

Table 1: Activities Engaged in Last 7 Days - by Topography

	FY	Radio	TV	Internet	Newspaper	Magazine
Total	Q1 2023/24	77%	74%	57%	17%	5%
	Q2 2023/24	78%	75%	58%	16%	7%
Central	Q1 2023/24	81%	83%	59%	19%	5%
	Q2 2023/24	80%	87%	57%	15%	6%
Coast	Q1 2023/24	68%	68%	53%	12%	5%
	Q2 2023/24	73%	73%	53%	14%	8%
Lake	Q1 2023/24	84%	73%	51%	14%	4%
	Q2 2023/24	83%	72%	53%	16%	11%
Lower Eastern	Q1 2023/24	78%	70%	49%	14%	3%
	Q2 2023/24	85%	80%	43%	16%	5%
Nairobi	Q1 2023/24	64%	80%	75%	23%	7%
	Q2 2023/24	69%	81%	83%	21%	8%
North Eastern	Q1 2023/24	54%	53%	64%	17%	3%
	Q2 2023/24	62%	46%	70%	18%	2%
North Western	Q1 2023/24	68%	58%	56%	10%	0%
	Q2 2023/24	74%	70%	62%	11%	3%
Rift	Q1 2023/24	83%	74%	63%	18%	5%
	Q2 2023/24	82%	71%	62%	20%	11%
South Nyanza	Q1 2023/24	85%	62%	44%	12%	2%
	Q2 2023/24	78%	57%	41%	7%	5%

Upper Eastern	Q1 2023/24	77%	87%	49%	15%	4%
	Q2 2023/24	71%	71%	47%	17%	9%
Western	Q1 2023/24	82%	70%	52%	22%	8%
	Q2 2023/24	85%	74%	57%	17%	6%

2.4. Number of Media Consumed

The data trend indicates a surge in multimedia consumption during Q2 2023/24. The number of respondents engaging with multiple media platforms in Q2 2023/24 witnessed a notable 10% increase. This increase uptick in respondents consuming multiple media sources during the fourth quarter of 2023 underscores a growing trend towards diversified media engagement. This shift has implications for content creators and advertisers, emphasizing the need to adopt integrated and cross-platform strategies to effectively reach and engage audiences in this evolving multimedia landscape.
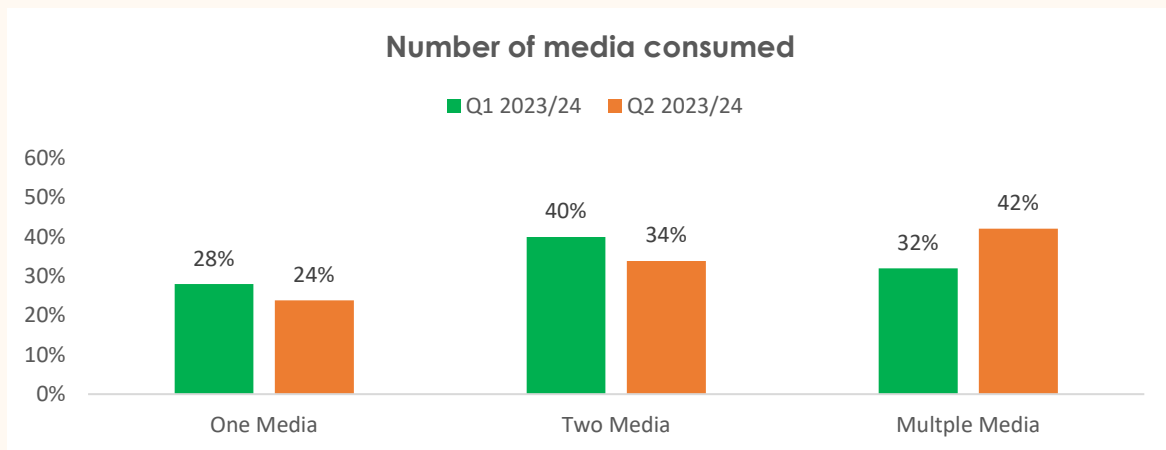
Figure 6: Number of media consumed by total

2.5. Type of Media Consumed

The predominant media consumption pattern observed in both quarters is the amalgamation of Radio, TV, and Online, constituting 24.6% in Q2 2023/24. This implies a substantial portion of the population concurrently engaging with radio, television, and online platforms.
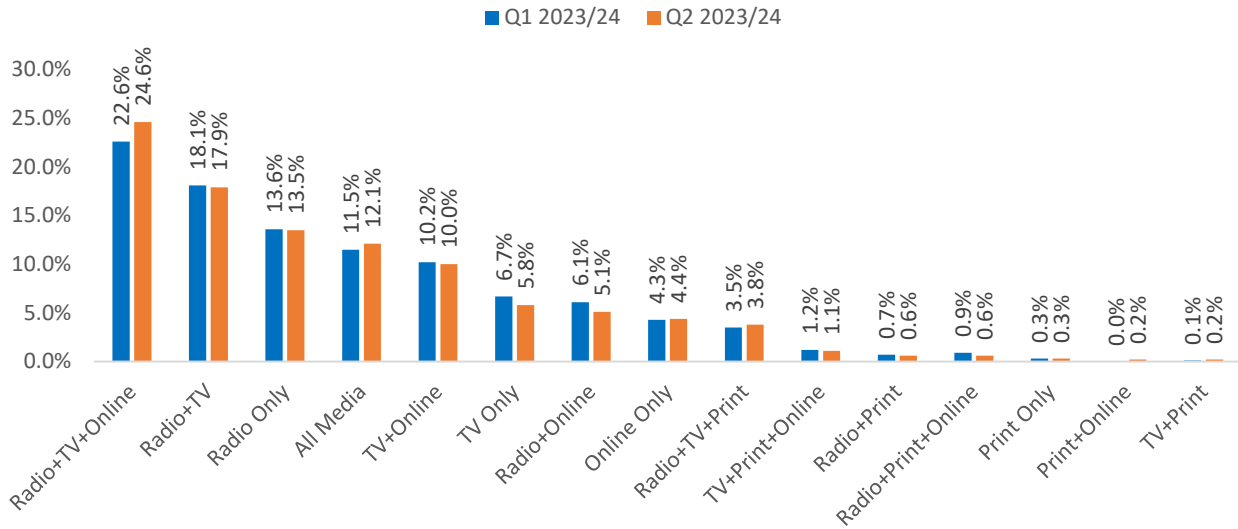
Figure 7: Type of media Consumed by total

2.6. Frequency of Media Consumption

The frequency of media consumption patterns in Q1 2023/24 and Q2 2023/24 reveals consistent daily engagement for TV (57% in both quarters) and radio (58% in Q1 2023/24 and 57% in Q2 2023/24). Social media and online video streaming show moderate increases in daily engagement from Q1 2023/24 to Q2 2023/24, with 45% to 46% for social media and 20% to 22% for online video streaming.

Figure 8: Frequency of consuming Tv, radio, social media, online streams and newspapers

2.7. Demographics of Media Consumers

Using population projections, the media consumer demographics are illustrated below.

Table 2: Demographics of media consumers in Kenya – LSM, age, setting and gender

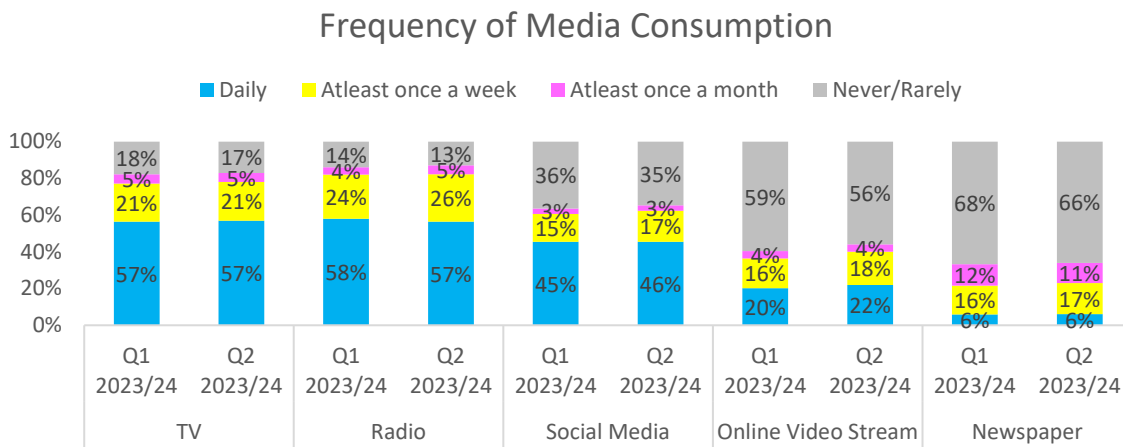| Demographics		FY	Radio Listeners, n=25.2M	TV Viewers, n=24.2M	Newspaper Readership, n=5.6M	Online Usage, n=19.0M
Gender	Male	Q1 2023/24	51%	52%	65%	54%
		Q2 2023/24	51%	52%	69%	56%
	Female	Q1 2023/24	49%	48%	35%	46%
		Q2 2023/24	49%	48%	31%	44%
Age group	15-17 years	Q1 2023/24	12%	10%	14%	13%
		Q2 2023/24	11%	10%	10%	14%
	18-24 years	Q1 2023/24	22%	23%	24%	30%
		Q2 2023/24	22%	24%	24%	29%
	25-34 years	Q1 2023/24	26%	28%	28%	32%
		Q2 2023/24	26%	28%	30%	31%
	35-44 years	Q1 2023/24	20%	20%	17%	16%
		Q2 2023/24	21%	19%	20%	15%
	45+ years	Q1 2023/24	20%	19%	17%	10%
		Q2 2023/24	20%	19%	17%	11%
Setting	Urban	Q1 2023/24	28%	36%	42%	42%
		Q2 2023/24	30%	36%	44%	43%
	Rural	Q1 2023/24	72%	64%	58%	58%
		Q2 2023/24	70%	64%	57%	57%
LSM Group	LSM 1 to 4	Q1 2023/24	16%	6%	2%	6%
		Q2 2023/24	16%	6%	3%	3%
	LSM 5 to 7	Q1 2023/24	33%	32%	18%	22%
		Q2 2023/24	30%	28%	14%	19%
	LSM 8 to 11	Q1 2023/24	40%	46%	56%	53%
		Q2 2023/24	41%	48%	54%	54%
	LSM 12+	Q1 2023/24	11%	16%	23%	19%
		Q2 2023/24	13%	18%	29%	24%

3. Radio Listenership Section

3.1. Radio Listeners' Key Demographics

Males exhibit higher radio consumption compared to females, and this trend is more pronounced among older respondents. Additionally, radio listenership shows an upward trajectory with increasing age.
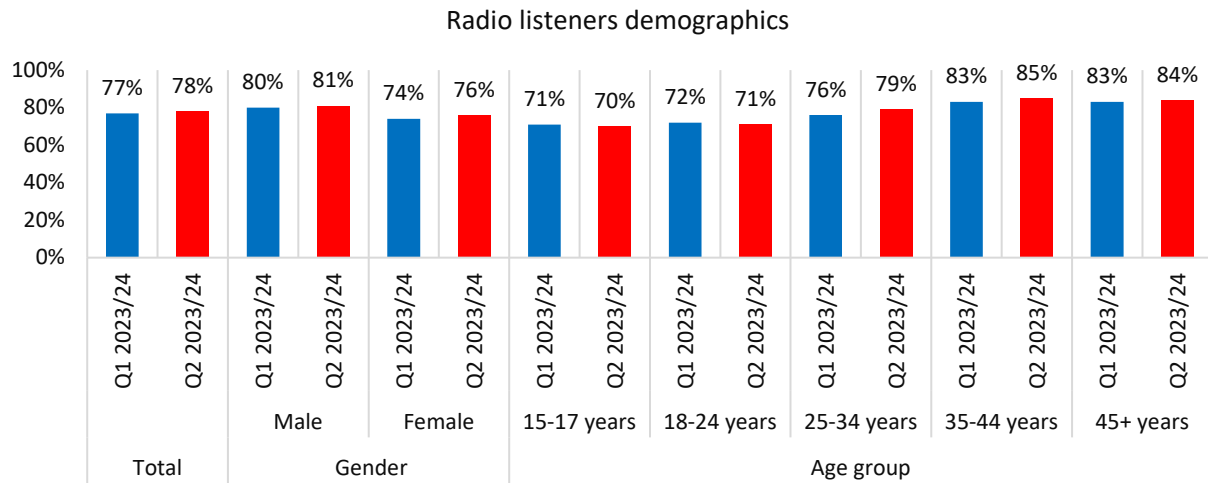
Figure 9: Demographics of radio consumers– by total, gender

The highest radio consumption is observed in those in lower LSMs. There higher listenership in rural areas.
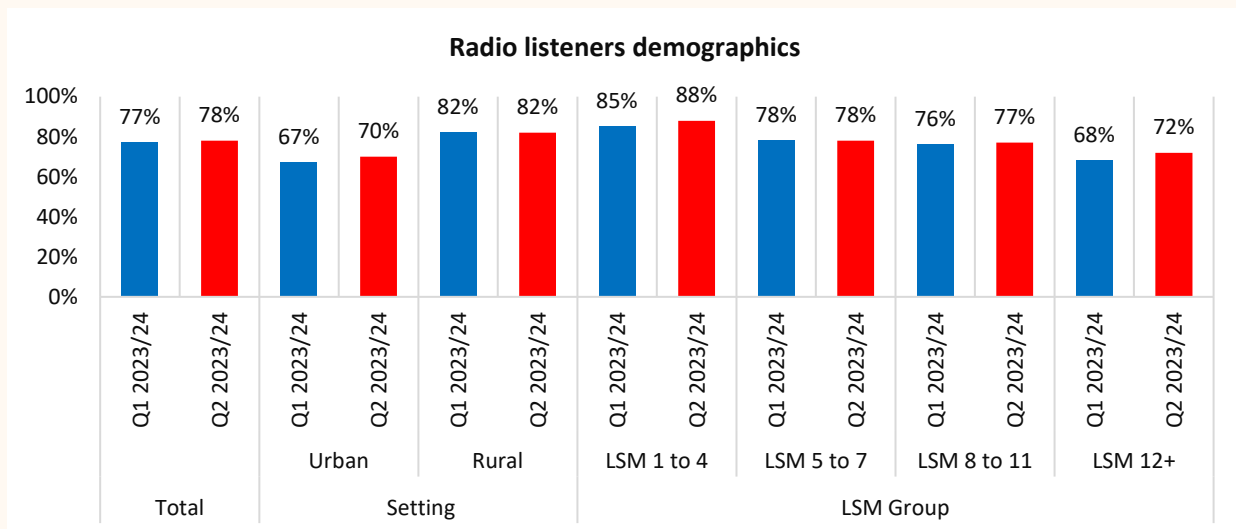
Figure 10: Demographics of radio consumers– by total, setting and LSM

The highest radio consumption is observed in Lower Eastern and Western topographies, with the lowest incidence recorded in North Eastern.

Radio listeners demographics
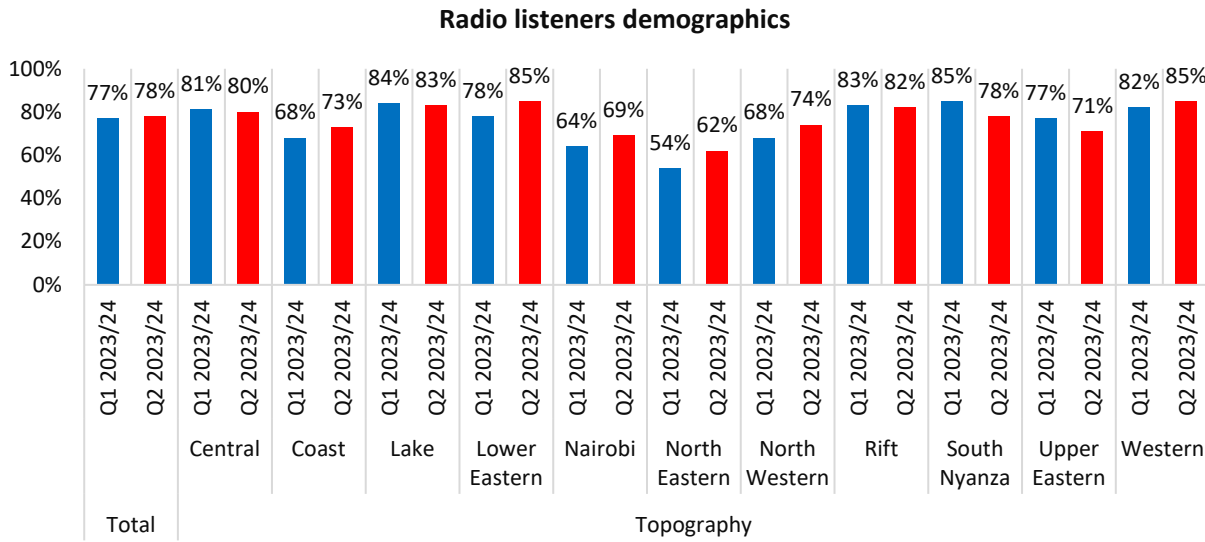
Figure 11: Demographics of radio consumers– by total, Topography

3.2. Radio Listenership Language

Swahili is the language most of the stations tuned into followed by vernacular.

Language of radio listenership by key demographics
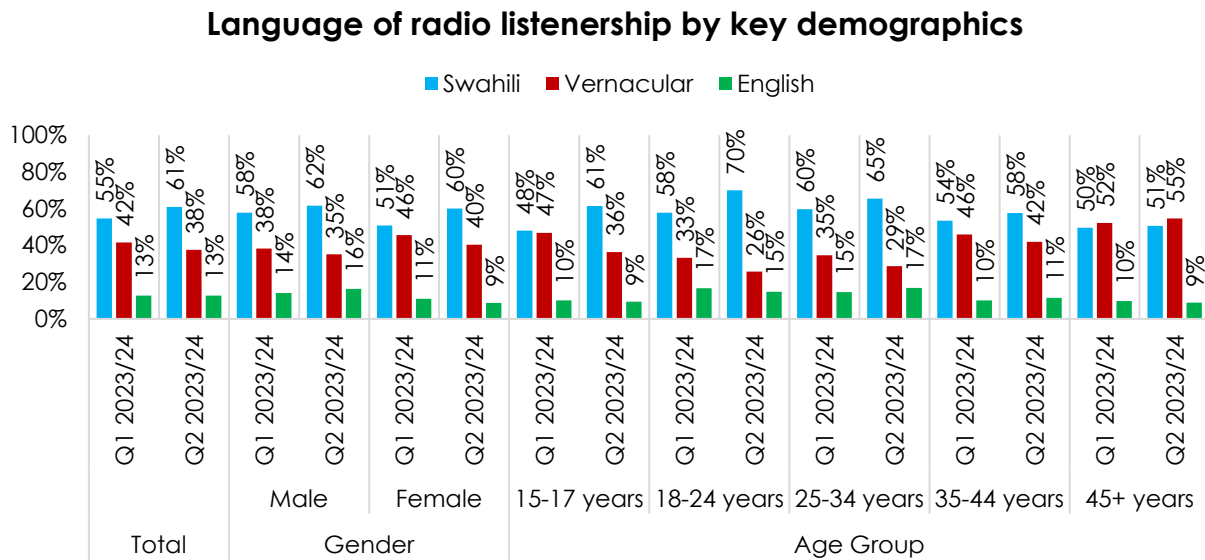
Figure 12: Radio listenership language by total, gender and age group

The higher incidence of English is amongst the Urban and LSM 12+ groups.

Language of radio listenership by key demographics

■ Swahili ■ Vernacular ■ English
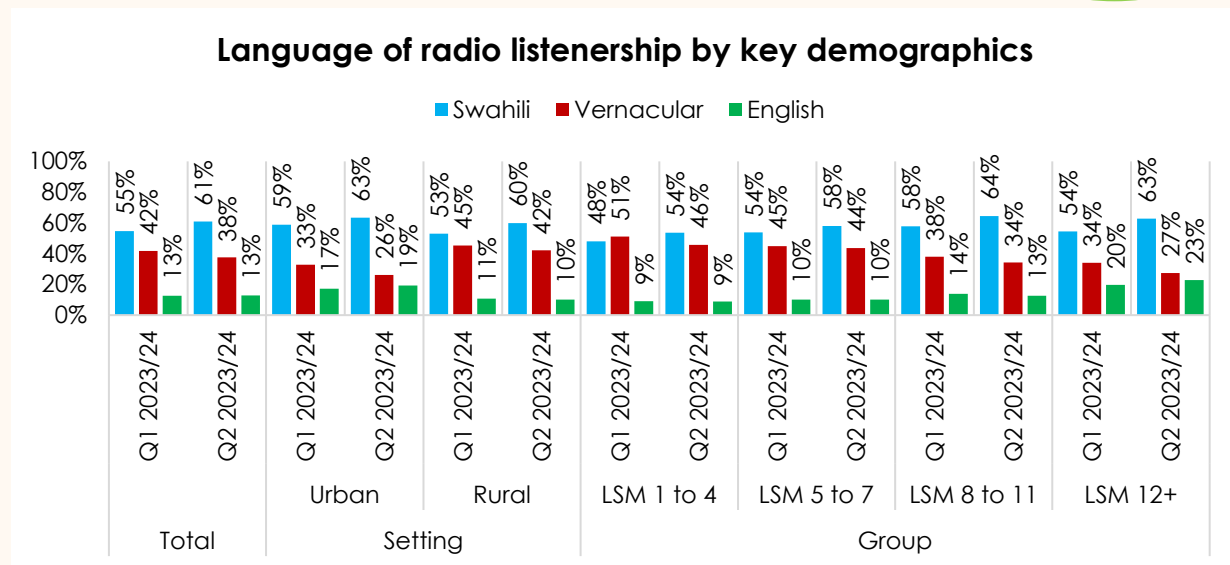
Figure 13: Radio listenership language by total, setting and LSM

Swahili stations have a higher listenership in the Western and Coast topographies. Listenership of vernacular stations is highest in the Lake and Lower Eastern topographies.

Language of radio listenership by key demographics

■ Swahili ■ Vernacular ■ English
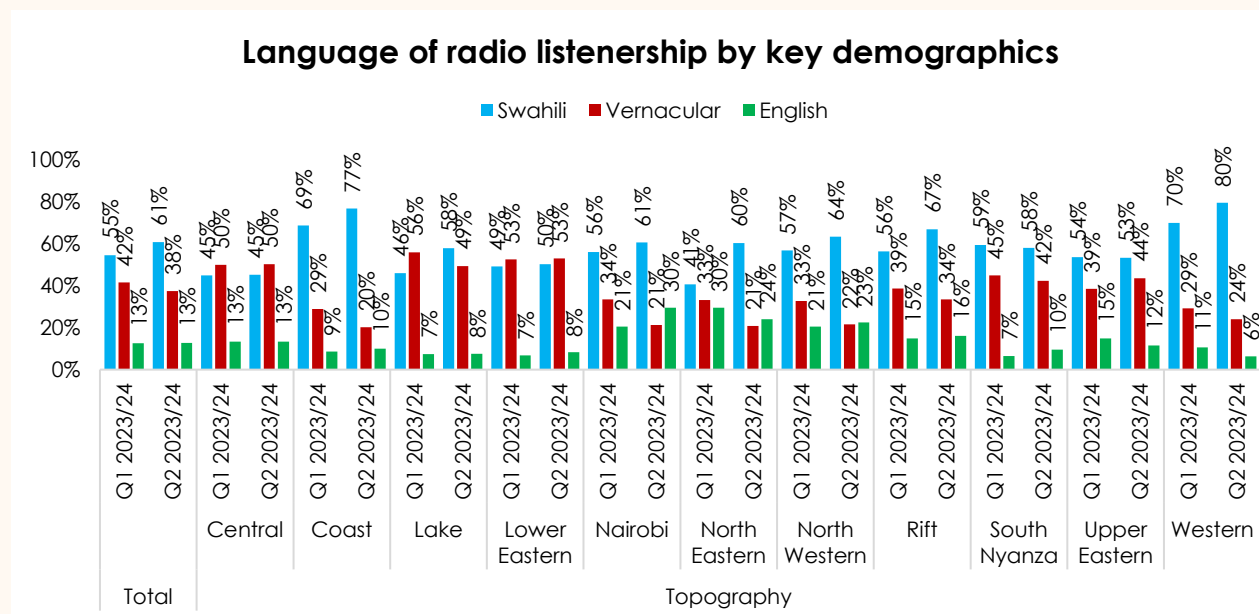
Figure 14: Radio listenership language by total and topography

4. TV Viewership Section

4.1. TV Viewer's Key Demographics

The data highlight gender disparities in TV viewership, with males showing higher engagement across Q1 and Q2 2023/24. The lower viewership among individuals aged 15 to 17 suggests the impact of educational commitments on their TV consumption.

TV viewers demographics
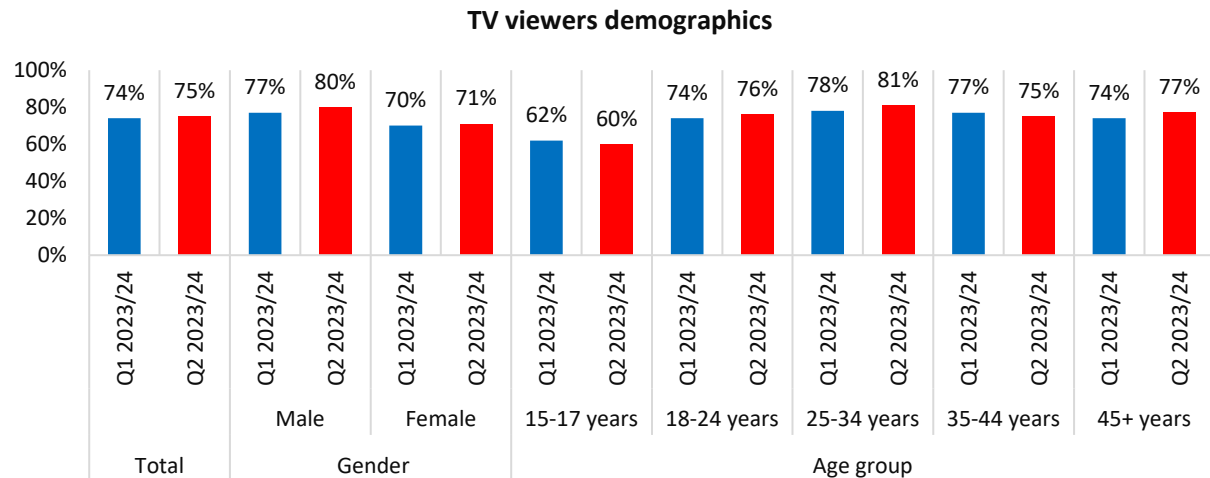
N=32.23M: All Respondents

Figure 1415: TV Viewership demographics – by total, gender and age group

The lower viewership in the lower LSM categories underscores the potential influence of socioeconomic factors, such as limited access to TV sets. These insights emphasize the need for tailored strategies to address diverse demographic and socioeconomic factors when considering TV audience engagement.

TV viewers demographics
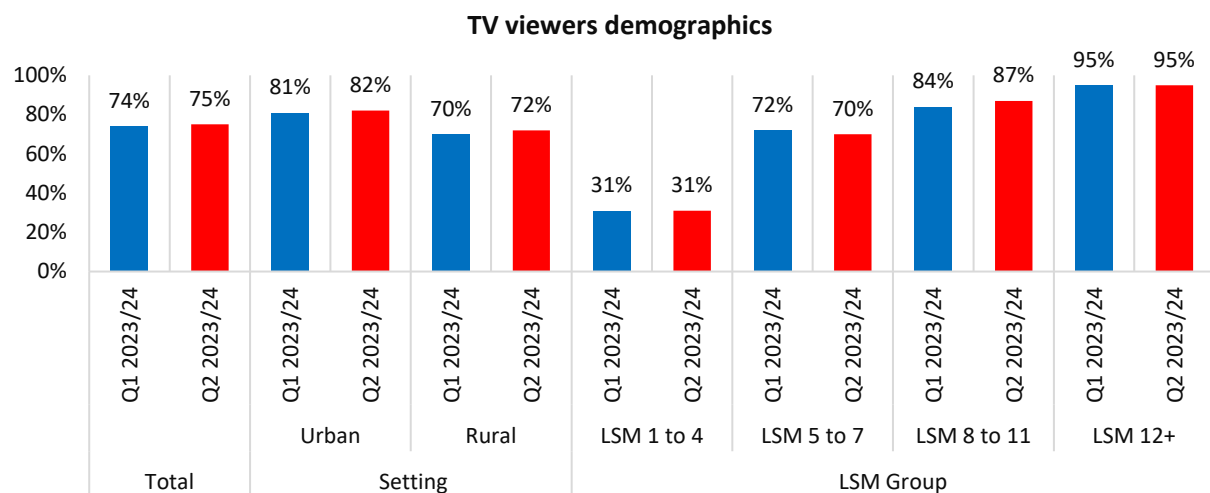
N=32.23M: All Respondents

Figure 15: TV Viewership demographics – by total, setting and LSM

TV viewership is more pronounced in urban areas, with Upper Eastern leading in viewership, followed by Central and Nairobi topography. Conversely, the lowest incidence of TV viewership is recorded in North Eastern regions. The disparities in TV viewership patterns across different geographic regions underscore the importance of tailoring media strategies to specific areas.

TV viewers demographics
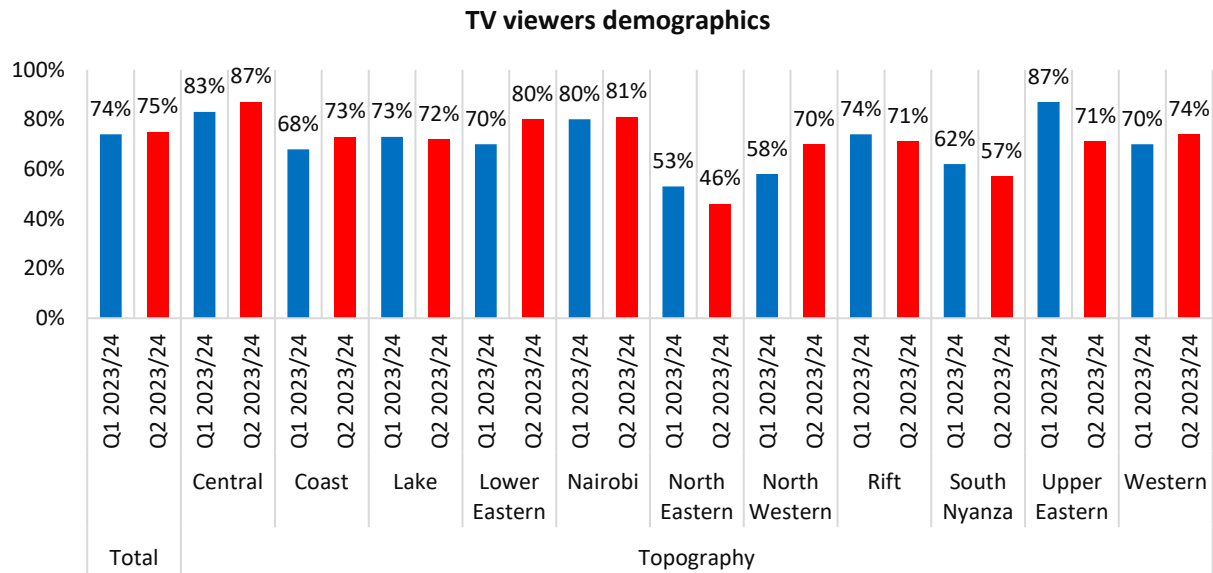
N=32.23M: All Respondents

Figure 16: TV Viewership demographics – by total, topography and setting

4.2. TV Reach – Pay TV vs Free to Air (FTA)

In Kenya, Free to Air (FTA) TV enjoys a notably broader viewership compared to pay TV. For both Pay TV and FTA TV, reach does not vary by gender. However, the reach of pay TV is slightly higher among individuals aged 18 to 24 years.
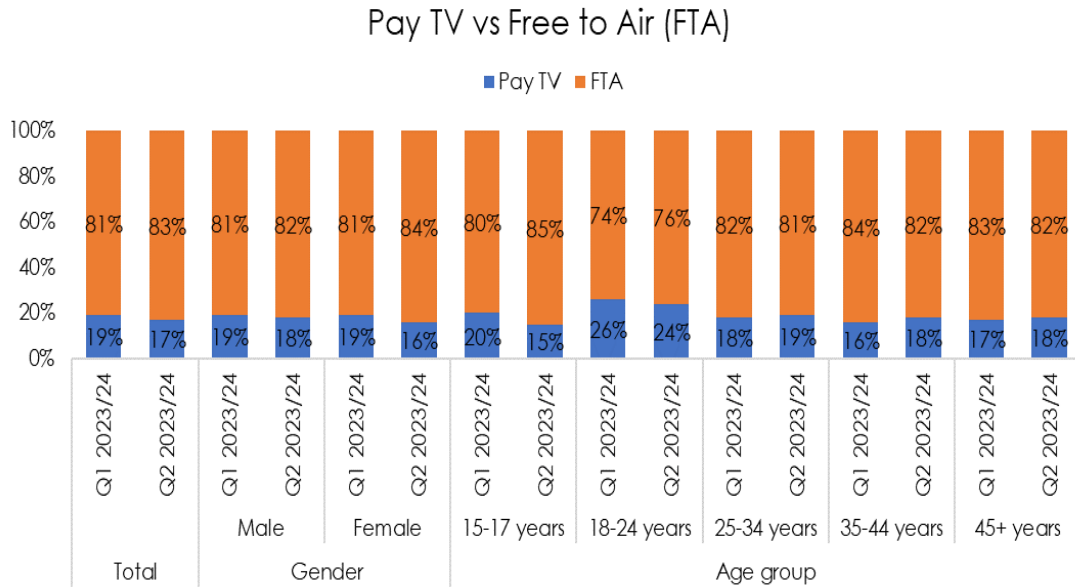
Figure 17: Pay TV vs Free to Air TV Reach – total, age and LSM

In urban areas, pay TV access is higher than rural areas.
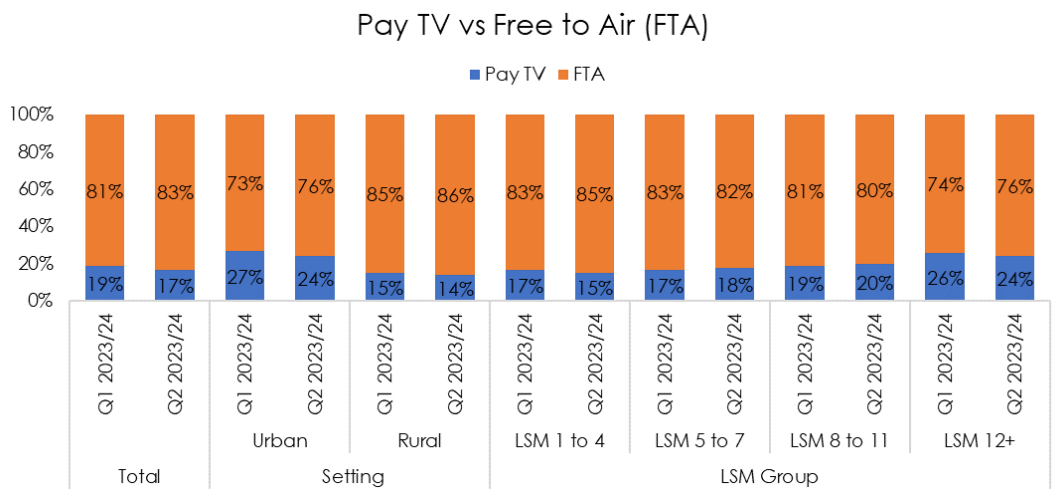
Figure 1816: Pay TV vs Free to Air TV Reach - total and gender

4.3. Exposure to impact of advertising

Advertising during high audience time bands, such as prime time slots on television or peak hours on popular online platforms, ensures that promotional messages are exposed to a larger and more engaged audience. This strategic timing allows brands to capitalize on peak viewership or online activity, increasing the likelihood of reaching a significant number of individuals. As a result, the impact of the

advertising campaign is amplified, as it has the potential to resonate with a broader demographic and generate greater awareness or engagement for the promoted product or service.

Figure 17: TV exposure to and impact to advertising

5. Internet Usage

5.1. Internet Access by Demographics

More than half of the respondents are internet users. There are more male than female internet users. In addition, the incidence of internet usage is higher amongst the younger folk aged below 34 years.
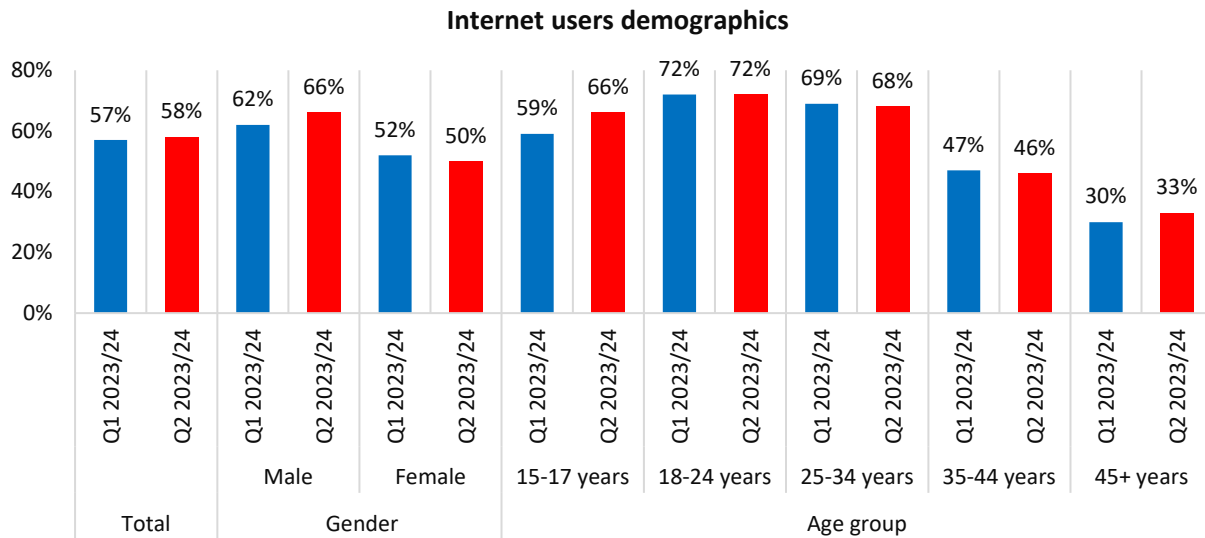
n=19.0M: Average Internet Users

Figure 1918: Internet users demographics – total, gender and age group

The increased prevalence of internet access in Kenyan urban areas can be attributed to well-established infrastructure, featuring a comprehensive network of high-speed broadband and cellular connectivity. Moreover, urban locales tend to possess greater economic resources, fostering increased penetration of

digital devices and technology adoption in comparison to rural regions. The higher the LSM, the higher the internet usage.

Figure 20: Internet users demographics – total, setting and LSM

Nairobi taking the lead in accessibility, followed by North Eastern, while South Nyanza records the lowest internet availability.

Figure 21: Internet users demographics – total and topography

5.2. Devices Used

The prevalent mode of internet access is primarily through smartphones, underscoring the pivotal role these devices play in facilitating connectivity and information access for a wide range of users. As mobile technology continues to advance, ensuring equitable access to smartphones becomes crucial for fostering digital inclusion and bridging gaps in connectivity across various demographics.

Devices used to access internet

■ Q1 2023/24   ■ Q2 2023/24

Device	Q1 2023/24	Q2 2023/24
Mobile Smart Phone	73.3%	86.6%
Laptop	4.1%	5.4%
Smart TV	1.4%	1.9%
Tablet/iPad	0.6%	0.3%
Desktop	0.3%	0.3%
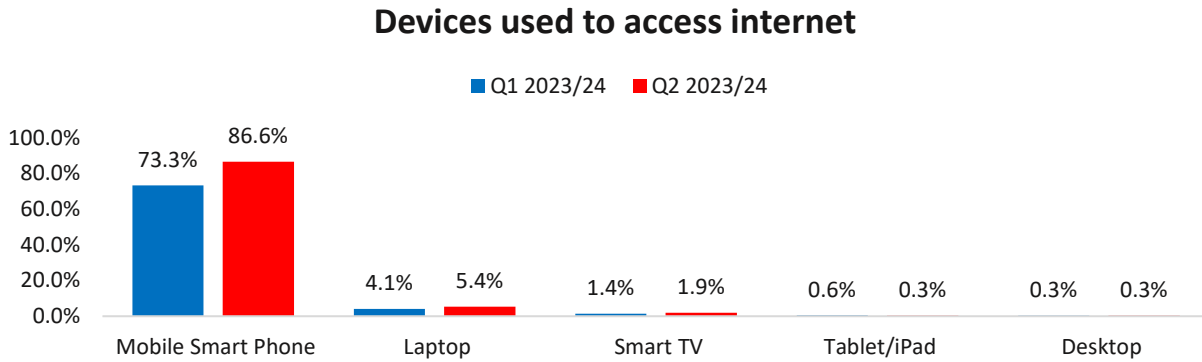
Figure 25: Devices used to access the internet

5.3. Social Media Platforms

Facebook and WhatsApp stand out as the top social media platforms in Kenya, with the highest mentions reaching 45%. Following closely in popularity, YouTube and TikTok secure the third and fourth positions. The prevalence of Facebook and WhatsApp in social media mentions highlights their extensive adoption and influential presence in the Kenyan digital landscape.

Social media platforms

Platform	Q1 2023/24	Q2 2023/24
Facebook	45.2%	47.5%
Whatsapp	45.9%	47.3%
YouTube	18.6%	21.0%
Tiktok	19.3%	17....
Instagram	8.9%	11.8%
Twitter	7.5%	7.9%
Google	8.2%	6.9%
Opera mini	2.2%	3.4%
Chrome	1.9%	2.8%
Telegram	2.0%	2.0%
Email	0.8%	0.8%
Snapchat	0.7%	0.7%
LinkedIn	0.5%	0.7%
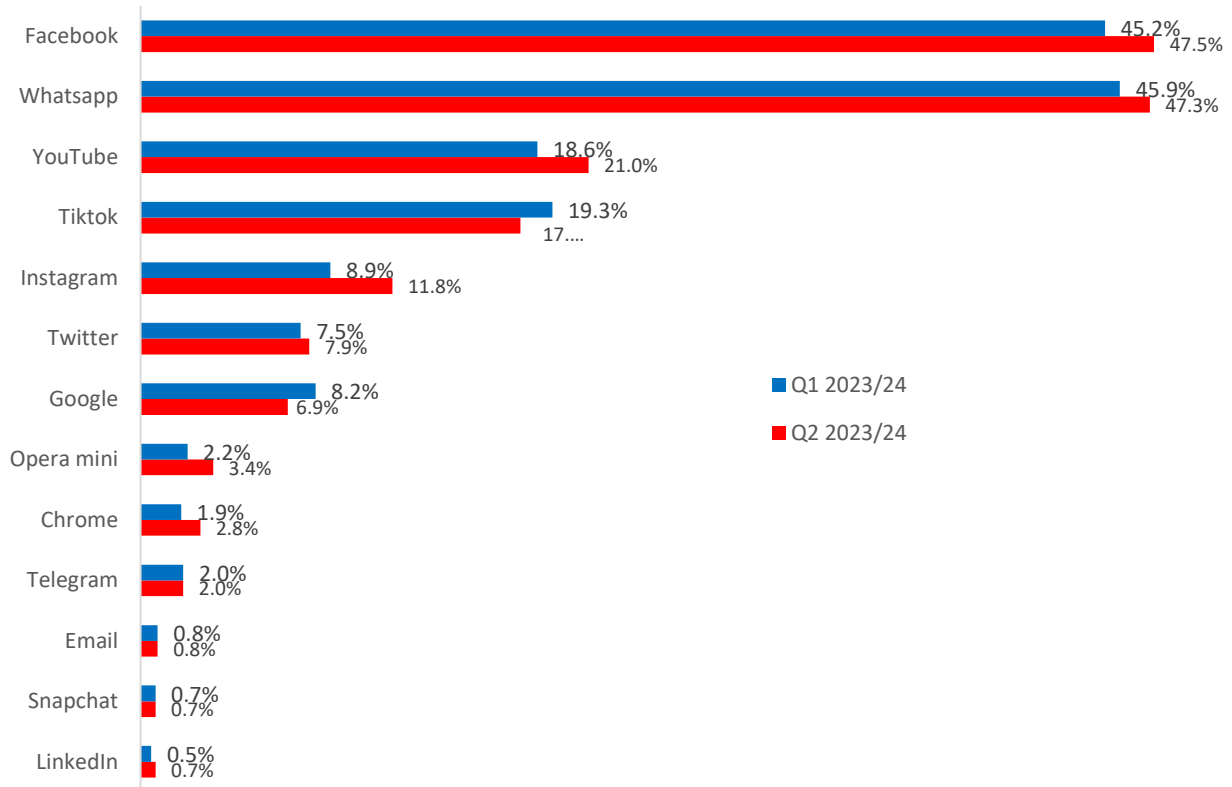
Figure 2619: Popular social media platforms

6. Newspaper Readership

There are more males who read newspapers as compared to females. In terms of age, readership is fairly similar.
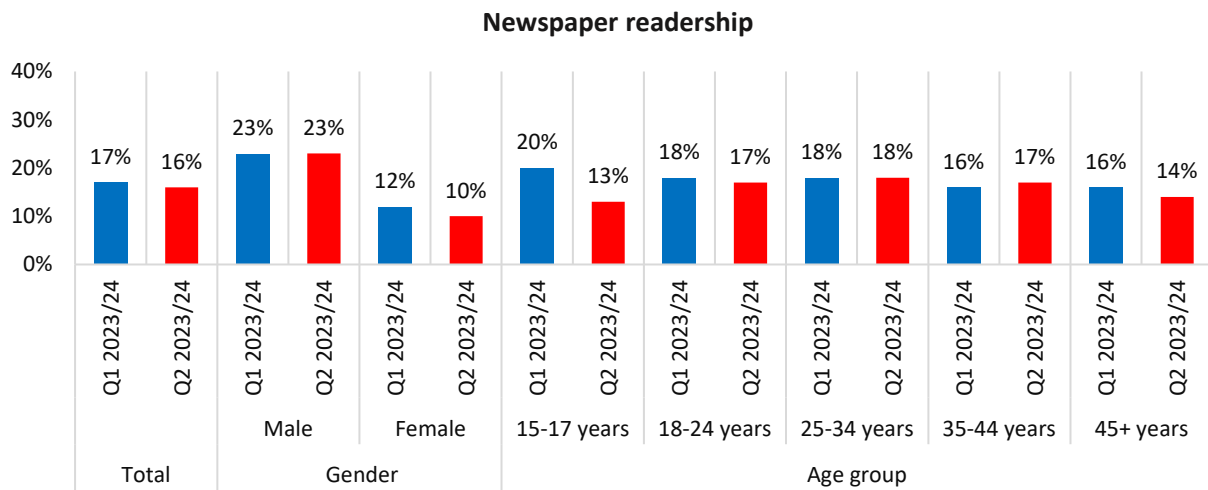
Newspaper readership

	Q1 2023/24	Q2 2023/24
Total	17%	16%
Male	23%	23%
Female	12%	10%
15-17 years	20%	13%
18-24 years	18%	17%
25-34 years	18%	18%
35-44 years	16%	17%
45+ years	16%	14%

n=32.2M: All Respondents

The higher LSMs have a higher incidence of readership and also in urban areas.

Newspaper readership
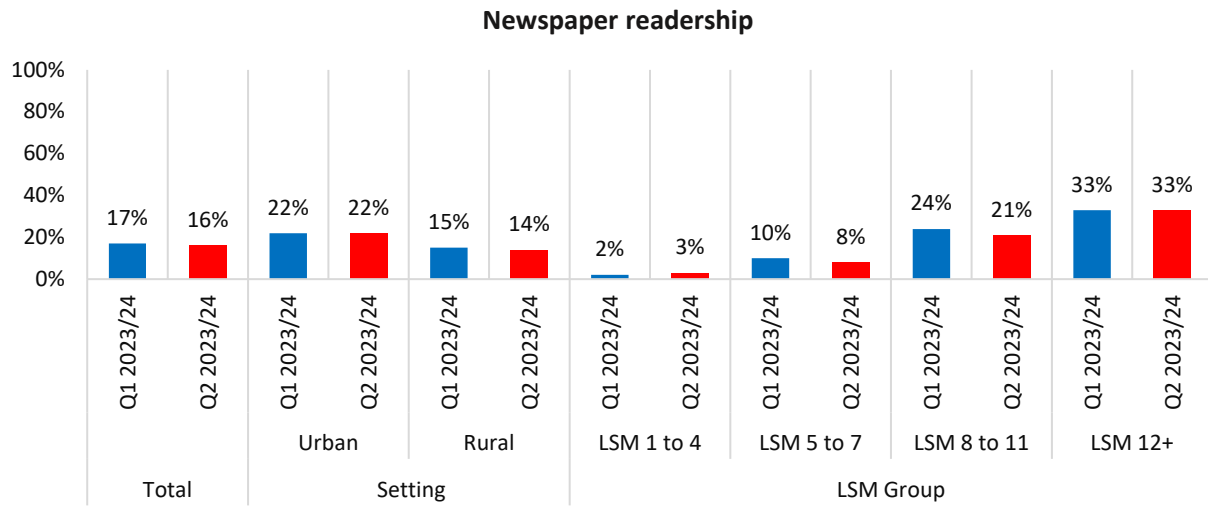
n=32.2M: All Respondents

Figure 2321: Newspaper readership demographics – by total, setting and LSM

Higher readership incidences are reported in Nairobi and Rift topographies

Newspaper readership
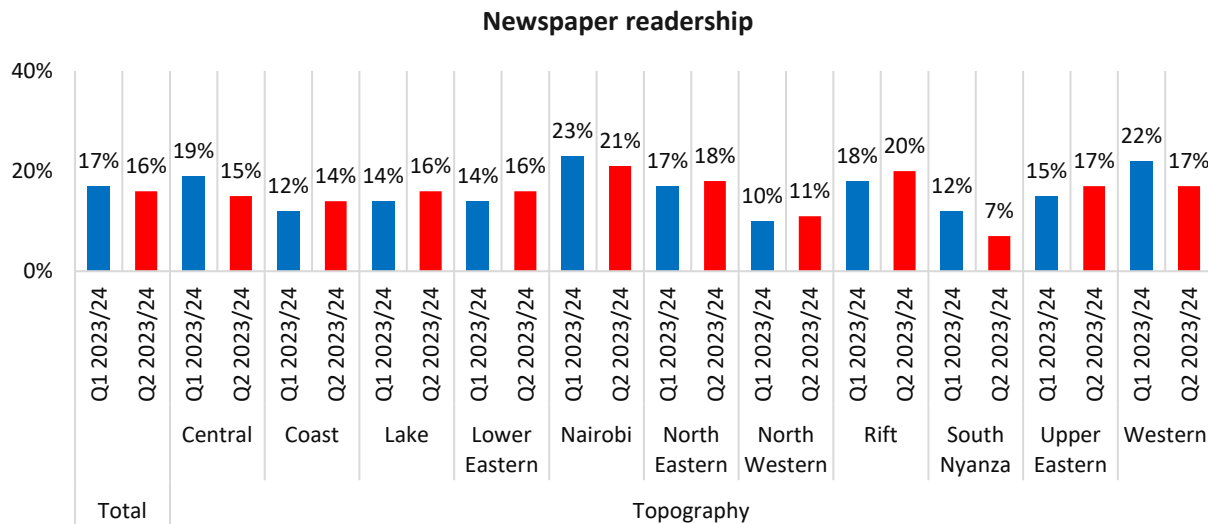
n=32.2M: All Respondents

Figure 24: Newspaper readership demographics – by total and topography

7. Advertising Expenditure

7.1. Advertising Expenditure Overview

The industry's total spending rose from Kes 16 billion to 17 billion between Q1 2023/24 and Q2 2023/24. Media has the highest sector expenditure, trailed by financial services.

Table 3: Advertising Expenditure

SECTORS	Q1 2023/24	Q2 2023/24	CHANGE
Media	2,678	3,331	24%
Financial Services	2,317	2,392	3%
Corporate & Multibrand	1,403	1,929	37%
Betting & Gaming	1,067	1,345	26%
Communications	1,345	1,006	-25%
Property & Building & Acc.	1,355	835	-38%
Personal Care	1,064	1,112	5%
Foods	894	911	2%
Household	788	851	8%
Transport	532	545	2%
Publishing & Education	540	419	-23%
Tourism & Entertainment	343	540	57%
Beverage	407	424	4%
Pharmaceuticals	373	426	14%
Office Equipment & Supplies	373	388	4%
Retail	324	391	21%
Veterinary & Agriculture	212	365	72%
Clothing, Fabrics & Footwear	42	31	-25%
Total	16,059	17,242	7%

Specifically, TV has the greatest spending, with radio coming in second.

Table 4: Advertising Expenditure for radio, TV & print

SECTORS	TELEVISION	RADIO	PRINT	Grand Total	SOS
Media	2,543	447	341	3,331	19%
Financial Services	1,337	939	117	2,392	14%
Corporate & Multibrand	825	419	685	1,929	11%
Betting & Gaming	892	410	43	1,345	8%
Personal Care	922	189	1	1,112	6%
Communications	640	349	16	1,006	6%
Foods	684	224	3	911	5%
Household	663	176	11	851	5%
Property & Building & Acc.	724	86	25	835	5%
Transport	234	277	34	545	3%
Tourism & Entertainment	347	39	153	540	3%
Pharmaceuticals	291	124	11	426	2%
Beverage	217	203	4	424	2%
Publishing & Education	269	63	87	419	2%
Retail	245	123	24	391	2%
Office Equipments & Supplies	309	78	2	388	2%
Veterinary & Agriculture	61	302	2	365	2%
Clothing, Fabrics & Footwear	18	5	9	31	0.2%
Grand Total	11,220	4,454	1,568	17,242	100%

7.2. Year to Date Advertising Trends

While electronic media showed positive trends, media purchasing witnessed an 8% decline in the second half, attributed to the economic downturn caused by high inflation.
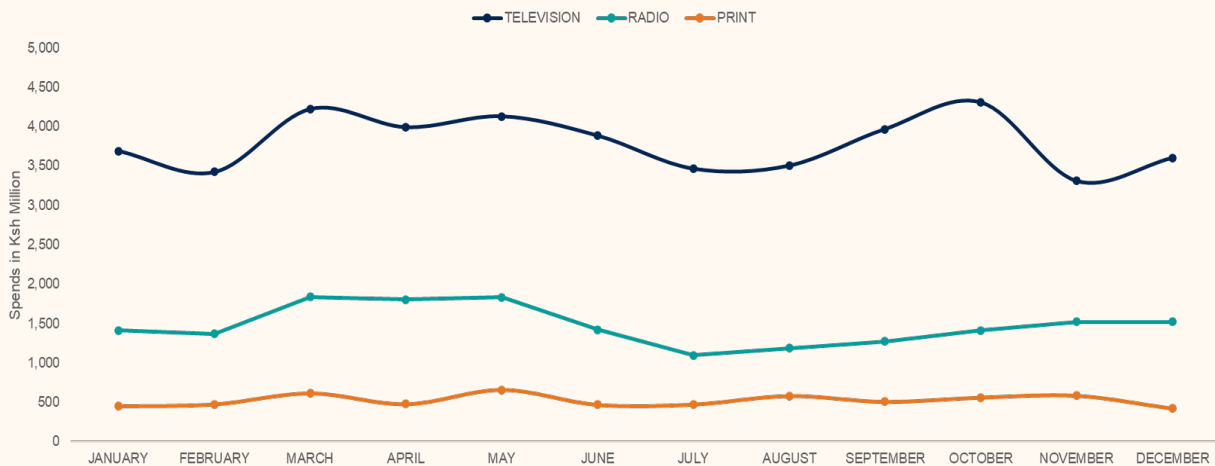

Figure 2722: Advertising spends Jan to December 2023

7.3. TV Advertising Expenditure – Pay TV and Free to Air

The predominant allocation of advertising spending is directed towards free to air TV, highlighting its central role in the advertising landscape. This emphasis on free to air TV underscores its effectiveness in reaching a wide and diverse audience.
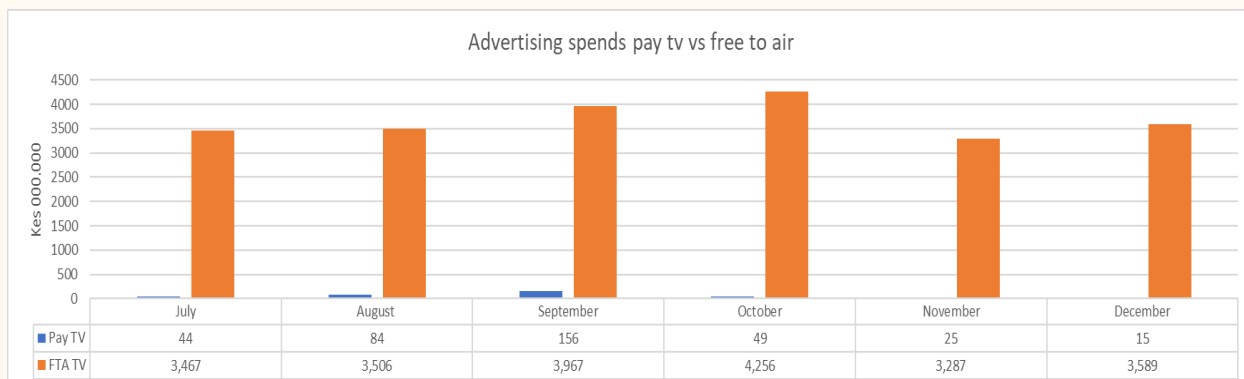

Figure 28: Advertising spends pay TV and free to air TV

7.4. TV Spends by Sector/Industry

The FMCG sectors struggles with the heavy load of economic inflation, which is impacting consumer purchasing power. Reduced media budget across sectors resulted in increased media house campaigns.

Table 5: TV spends by sector/industry

	Q1 2023/24	Q2 2023/24
Media	1,924	2,543
Financial Services	1,335	1,337
Personal Care	1,023	922
Betting & Gaming	689	892
Corporate & Multibrand	520	825
Property & Building & Acc.	1,161	724
Foods	727	684
Household	608	663
Communications	826	640
Tourism & Entertainment	340	347
Office Equipments & Supplies	303	309
Pharmaceuticals	267	291
Publishing & Education	394	269
Retail	277	245
Transport	278	234
Beverage	195	217
Veterinary & Agriculture	33	61
Clothing, Fabrics & Footwear	36	18

7.5. Radio Spends by Sector/Industry

Financial services have the highest advertising spend on radio.

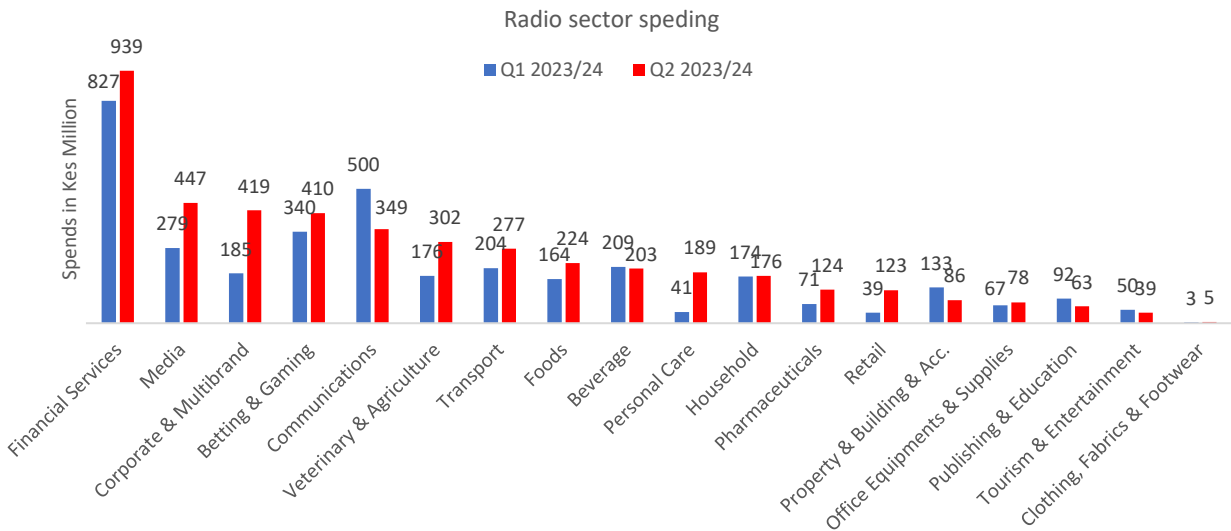**Radio sector speding**

■ Q1 2023/24 ■ Q2 2023/24

Figure 2923: Advertising spend by sector for radio

7.6. Print Spends by Sector/Industry

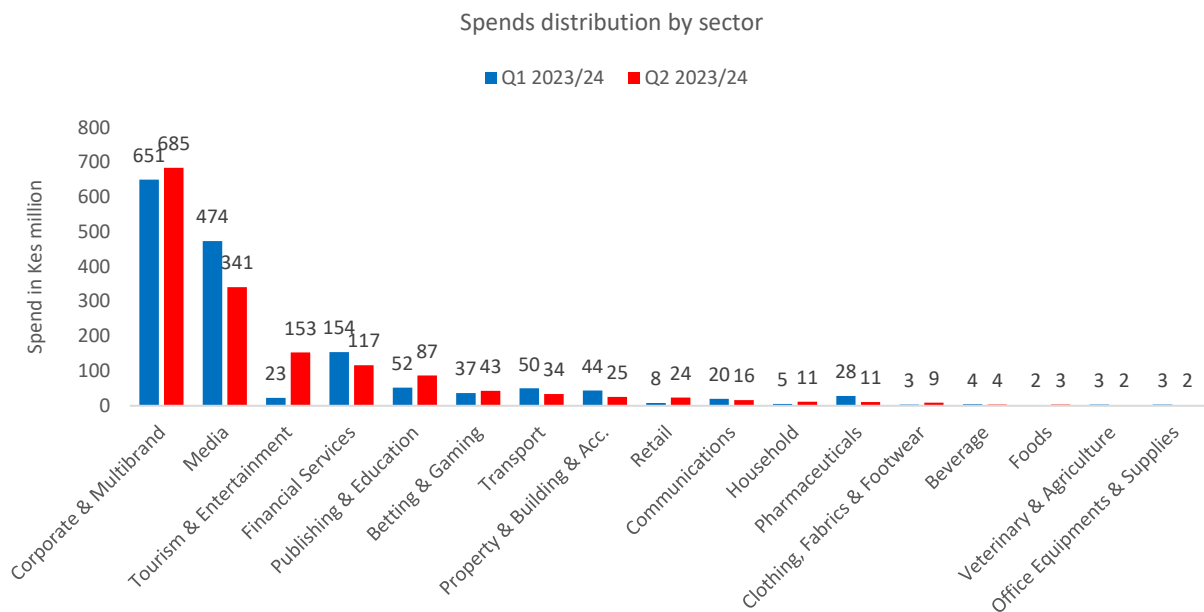The highest spends distribution is on corporate and multi-brand and media.

Spends distribution by sector

■ Q1 2023/24 ■ Q2 2023/24

Figure 3024: Spend distribution by sector on print

8. CHALLENGES AND OPPORTUNITIES FOR THE BROADCASTING INDUSTRY IN KENYA

Challenges in the Broadcasting Industry in Kenya

- ❖ **Competition:** The rise in the proportion of individuals engaging with multiple media platforms, from 32% to 42% during the second quarter of 2023/24, signifies a heightened level of competition within the media landscape. This increase suggests that consumers are diversifying their media consumption habits, potentially driven by the availability of a wide array of media options and the desire for varied content experiences. As a result, media companies may need to adapt their strategies to effectively compete for audience attention across various platforms.

- ❖ **Technological advancements:** The rapid evolution of technology, characterized by advanced transmission formats and novel content delivery methods, necessitates investment and adaptation. The combined utilization of radio, TV, and online platforms, accounting for 24.6% in Q2 2023/24, signifies a significant shift from traditional media practices. This trend underscores the advancement of technology within the media landscape, highlighting the need for continuous innovation and strategic adjustments to effectively navigate the evolving media ecosystem.

- ❖ **Audience All Over the Place**: In the past, our choices for TV and radio channels were limited. However, with the proliferation of digital platforms, audiences are now scattered across numerous channels and platforms. This presents a challenge for broadcasters as they must adapt to evolving viewer habits and devise strategies to engage with them across multiple platforms effectively. This shift is evident in the fact that 76% of respondents now consume content from more than one media source.

Opportunities in the Broadcasting Industry in Kenya

- ❖ **Reaching Everyone**: The language of broadcast has enabled more content to reach people all over the country. The majority of radio stations broadcast either in Kiswahili (55%) or vernacular (42%) languages, resulting in a high reach. It's an amazing opportunity for content creators to expand their audience and tap into new markets.
- ❖ **Let's Get Interactive**: Unlike old-school broadcasting, digital platforms engage with viewers in real-time. Social media platforms such as Facebook, WhatsApp, YouTube, and TikTok stand out as the top social media platforms in Kenya, due to their widespread adoption and influential presence in the Kenyan digital landscape.
- ❖ **Multiple Preferences Experiences**: Digital platforms allow users to access multiple content preferences and experiences. This has been observed where entertainment emerges as the preferred content across all platforms, while Google receives more mentions in the context of education. YouTube and TikTok lead in mentions related to entertainment topics, and WhatsApp stands out with higher mentions on social and family issues.