



AUDIENCE MEASUREMENT AND INDUSTRY TRENDS REPORT

(October-December 2024)



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1. INTRODUCTION

Kenya's media landscape is renowned for its diversity and progress, boasting a vibrant radio sector with over 250 stations broadcasting in various local and vernacular languages. The 2015 transition to digital terrestrial broadcasting further expanded the television sector, while widespread mobile phone usage has driven one of Africa's highest internet penetration rates, providing Kenyans with access to an array of digital platforms. Despite these advancements, the highly competitive and ever-changing environment poses challenges for media outlets in capturing and maintaining a diverse audience amid shifting consumer preferences.

In this dynamic context, research plays a pivotal role in empowering media organizations, policymakers, and stakeholders to better understand audience behaviour, identify emerging trends, and evaluate the performance of different platforms. By uncovering market gaps and revealing new opportunities, research informs strategic content development to enhance audience engagement.

As digital transformation continues to redefine content consumption, research becomes critical in helping media organizations adapt to new technologies and distribution channels, ensuring they remain relevant and competitive. Investing in research is therefore essential for fostering growth and resilience in Kenya's increasingly digitalized media industry.

2. MEDIA AUDIENCE MEASUREMENT

2.1. Ways in Which Media is Consumed

Throughout the four quarters, consumption patterns remained consistent. Mobile phones make up about one-third of radio listenership, though traditional radio sets are still the primary means of listening. Television is predominantly watched on TV sets. Social media is mainly accessed via mobile phones and remains a key component of media consumption. Overall, these findings emphasize the diverse and interconnected ways people engage with different media channels today.

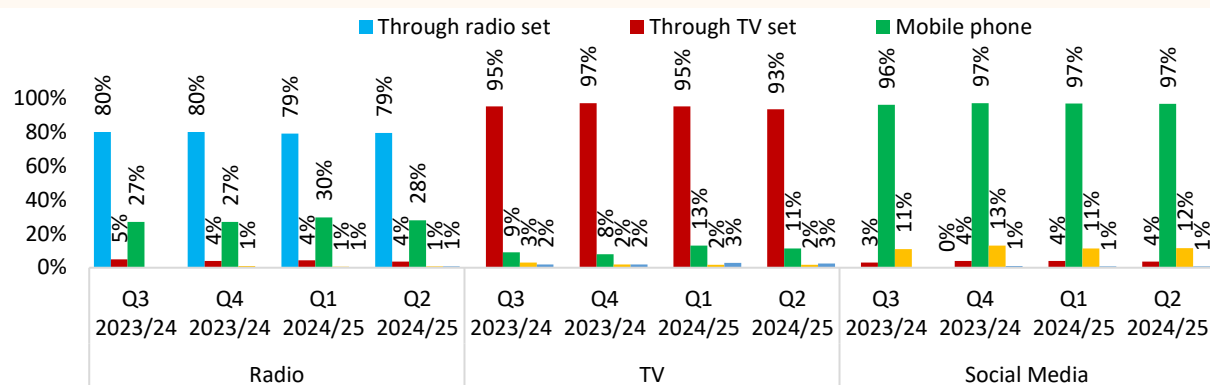


Figure 1: Ways in which media is consumed by total

2.2. Place of Media Consumption

From Q1 2024/25 to Q2 2024/25, there has been no significant change in where media is consumed. The home remains the primary setting for engaging with media, with radio slightly edging out television in this environment. Media consumption in the workplace favours television. In social settings such as bars, restaurants, and hotels, television content remains more popular.

Table 1: Place of media consumption by total

Place of Media Consumption	Total				Radio				TV			
	Q3 2023/24	Q4 2023/24	Q1 2024/25	Q2 2024/25	Q3 2023/24	Q4 2023/24	Q1 2024/25	Q2 2024/25	Q3 2023/24	Q4 2023/24	Q1 2024/25	Q2 2024/25
At own home	89%	89%	90%	89%	86%	85%	87%	87%	87%	87%	86%	86%
Place of work	3%	3%	3%	4%	4%	5%	4%	3%	5%	4%	4%	4%
Bar/Restaurant/Hotel	3%	2%	2%	2%	2%	2%	2%	2%	6%	6%	6%	7%
Someone else's household	3%	2%	2%	3%	1%	2%	2%	2%	2%	3%	3%	3%
Bus/Taxi/Matatu	1%	1%	1%	1%	2%	2%	2%	2%	0%	0%	0%	0%
In car - Private	1%	1%	1%	1%	4%	3%	2%	2%	0%	0%	0%	0%
On the move	0%	1%	1%	0%	1%	1%	1%	1%	0%	0%	0%	0%

2.3. Access and usage of traditional media & digital media

This shows that while digital media use, especially the internet, stayed the same, radio listening went down a bit. On the other hand, there was a small comeback for print media, with more people reading magazines and newspapers in the most recent quarter.

Access and Usage in the last 7 days

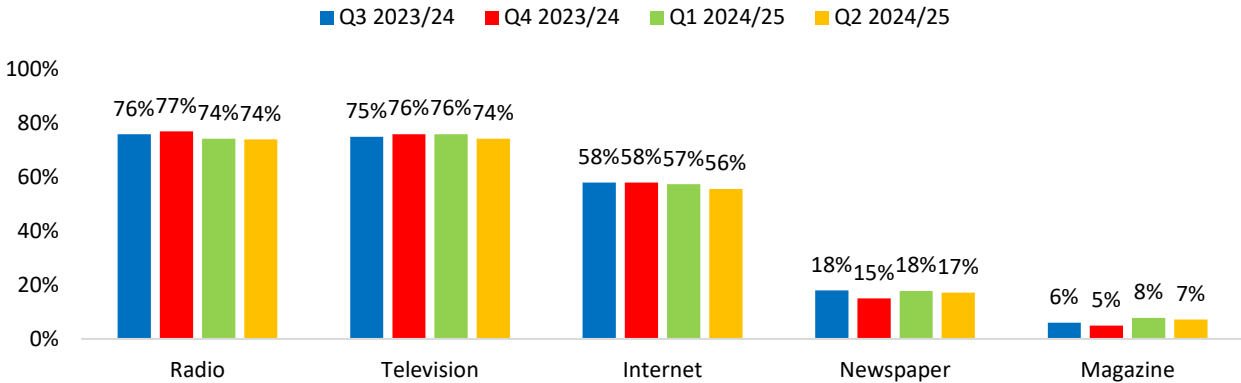


Figure 2: Access and Usage of media by total

The findings indicate a gender gap in media consumption, with male respondents consuming more TV, radio, online newspapers, and magazines than female respondents.

Activities Engaged in Last 7 Days

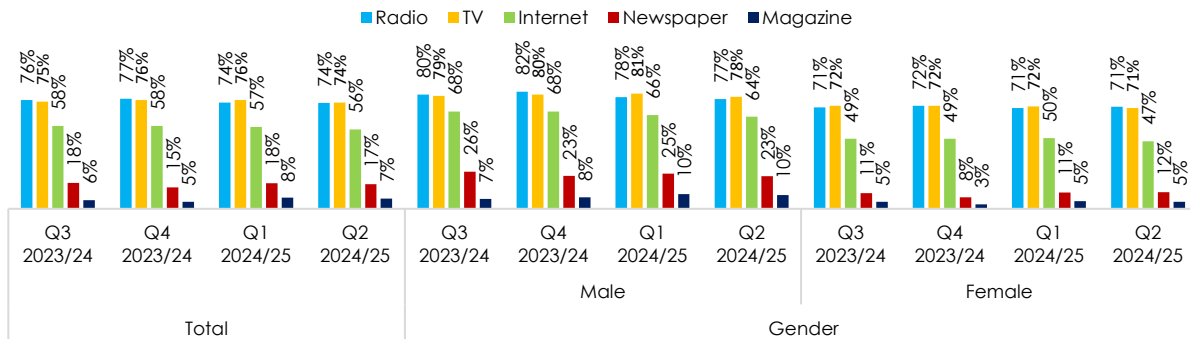


Figure 3: Activities Engaged in Last 7 Days - by total & gender

The age groups that showed the most engagement in radio were those aged 45+ years 83% and TV activities were those aged 18-24 years 78%.

Table 2: Activities Engaged in Last 7 Days - by total & LSM

		Quarter	Radio	TV	Internet	Newspaper	Magazine
Total		Q3 2023/24	76%	75%	58%	18%	6%
		Q4 2023/24	77%	76%	58%	15%	5%
		Q1 2024/25	74%	76%	57%	18%	8%
		Q2 2024/25	74%	74%	56%	17%	7%
LSM Group	LSM 1 to 4	Q3 2023/24	87%	35%	18%	3%	1%
		Q4 2023/24	88%	22%	14%	1%	0%
		Q1 2024/25	91%	26%	5%	2%	1%

		Q2 2024/25	90%	26%	8%	2%	1%
LSM 5 to 7		Q3 2023/24	76%	71%	36%	11%	2%
		Q4 2023/24	76%	77%	37%	4%	2%
		Q1 2024/25	74%	70%	28%	6%	1%
		Q2 2024/25	74%	69%	29%	7%	2%
LSM 8 to 11		Q3 2023/24	74%	89%	80%	25%	9%
		Q4 2023/24	77%	88%	77%	23%	6%
		Q1 2024/25	72%	86%	74%	21%	9%
		Q2 2024/25	71%	86%	74%	21%	8%
LSM 12+		Q3 2023/24	65%	94%	92%	33%	16%
		Q4 2023/24	72%	92%	95%	33%	14%
		Q1 2024/25	71%	94%	92%	39%	20%
		Q2 2024/25	70%	92%	92%	39%	20%

The regions with the largest radio listenership include the Lower Eastern (87%), Western (83%), South Nyanza (82%) and Lake (81%). While internet usage is most prevalent in North Eastern, with 83% of people using it, Central and Nairobi regions show noticeably high television consumption (83% and 82%). There are geographical differences in newspaper reading, with North Eastern regions showing notable increase of 5%.

Table 3: Activities Engaged in Last 7 Days - by Topography

	Quarter	Radio	TV	Internet	Newspaper	Magazine
Total	Q3 2023/34	76%	75%	58%	18%	6%
	Q4 2023/24	77%	76%	58%	15%	5%
	Q1 2024/25	74%	76%	57%	18%	8%
	Q2 2024/25	74%	74%	56%	17%	7%
Central	Q3 2023/34	76%	82%	62%	16%	4%
	Q4 2023/24	76%	86%	61%	19%	7%
	Q1 2024/25	75%	85%	54%	18%	8%
	Q2 2024/25	73%	83%	52%	18%	7%
Coast	Q3 2023/34	62%	72%	52%	13%	5%
	Q4 2023/24	68%	67%	64%	11%	3%
	Q1 2024/25	66%	72%	56%	18%	9%
	Q2 2024/25	67%	69%	54%	16%	8%
Lake	Q3 2023/34	83%	75%	49%	27%	7%
	Q4 2023/24	85%	82%	51%	14%	3%
	Q1 2024/25	76%	75%	58%	22%	10%
	Q2 2024/25	81%	75%	51%	20%	9%
Lower Eastern	Q3 2023/34	83%	73%	45%	16%	6%
	Q4 2023/24	80%	65%	44%	12%	6%

	Q1 2024/25	85%	70%	51%	13%	8%
	Q2 2024/25	87%	68%	50%	14%	8%
Nairobi	Q3 2023/34	65%	81%	81%	22%	8%
	Q4 2023/24	64%	84%	80%	16%	7%
	Q1 2024/25	65%	85%	79%	20%	6%
	Q2 2024/25	62%	82%	79%	19%	7%
North Eastern	Q3 2023/34	56%	51%	65%	13%	4%
	Q4 2023/24	58%	52%	74%	12%	7%
	Q1 2024/25	46%	67%	81%	14%	9%
	Q2 2024/25	43%	66%	83%	19%	13%
North Western	Q3 2023/34	74%	69%	57%	11%	1%
	Q4 2023/24	72%	73%	65%	11%	1%
	Q1 2024/25	54%	75%	57%	14%	3%
	Q2 2024/25	55%	72%	55%	13%	3%
Rift	Q3 2023/34	82%	80%	63%	22%	10%
	Q4 2023/24	84%	71%	53%	16%	4%
	Q1 2024/25	79%	80%	57%	22%	10%
	Q2 2024/25	80%	75%	53%	19%	8%
South Nyanza	Q3 2023/34	76%	70%	43%	15%	8%
	Q4 2023/24	86%	72%	54%	21%	10%
	Q1 2024/25	88%	60%	50%	14%	8%
	Q2 2024/25	82%	62%	49%	15%	6%
Upper Eastern	Q3 2023/34	79%	79%	54%	18%	7%
	Q4 2023/24	86%	83%	43%	18%	7%
	Q1 2024/25	80%	77%	55%	14%	8%
	Q2 2024/25	78%	79%	56%	13%	6%
Western	Q3 2023/34	82%	71%	52%	17%	7%
	Q4 2023/24	85%	74%	53%	15%	2%
	Q1 2024/25	83%	67%	48%	18%	5%
	Q2 2024/25	83%	67%	48%	18%	6%

2.4. Number of Media Consumed

There was a slight increase in the consumption of only one media platform, rising from 25.2% in Q1 2024/25 to 27.0% in Q2 2024/25. This suggests that more people may be opting for focused media engagement rather than spreading their attention across multiple platforms. Meanwhile, the use of two media platforms remained relatively stable, with a marginal shift from 35.2% in Q1 2024/25 to 35.1% in Q2 2024/25, maintaining a steady trend observed in previous quarters.

Conversely, the consumption of multiple media sources has continued to decline, dropping from 39.6% in Q1 2024/25 to 38.0% in Q2 2024/25. The overall trend highlights a gradual movement towards more selective media use, potentially driven by content saturation, time constraints, or a preference for deeper engagement with fewer media platforms.

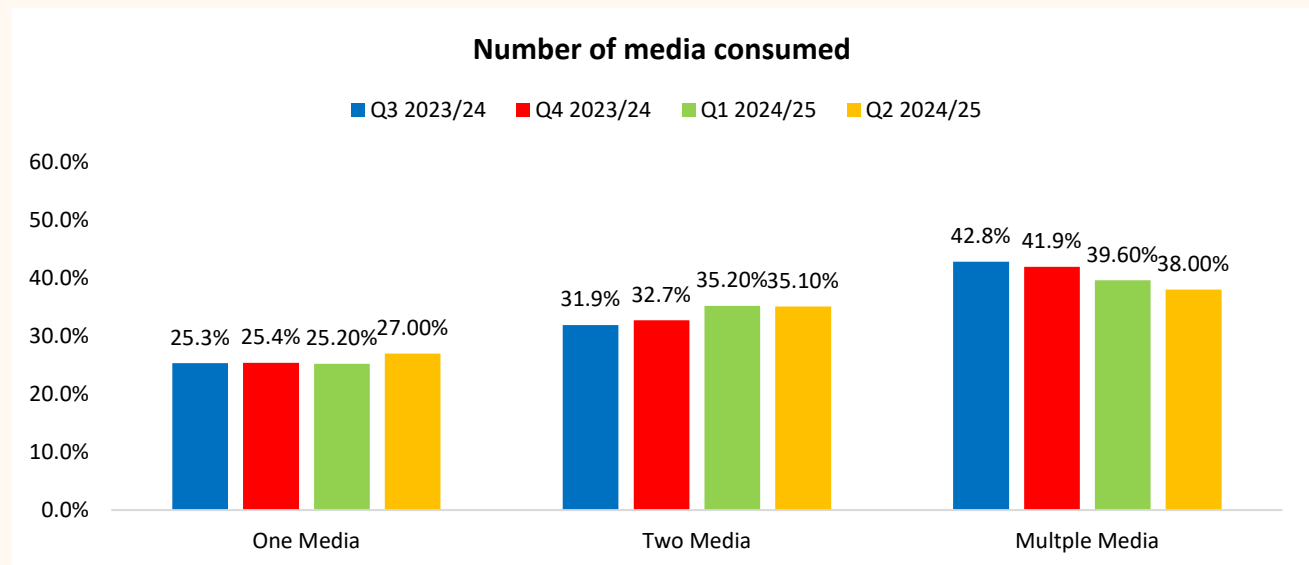


Figure 4: Number of media consumed by total

2.5. Type of Media Consumed

Across the four quarters, the prevailing trend in media consumption has been identified as the blending of multiple platforms, including Radio, Television, and Online mediums. This integrated consumption pattern accounted for 20% of total media consumption during the second quarter of the fiscal year 2024/25. This observation suggests that a significant segment of the population is concurrently engaging with various forms of media, encompassing radio broadcasts, television programming, and the numerous content available online.

Table 4: Type of media Consumed by total

Type of Media Consumed	Q3 2023/24	Q4 2023/24	Q1 2024/25	Q2 2024/25
Radio+TV+Online	24.0%	26.0%	21.2%	20.7%
Radio+TV	16.0%	17.0%	17.7%	17.5%
Radio Only	15.0%	14.0%	14.2%	15.4%

All Media	12.0%	12.0%	13.7%	12.4%
TV+Online	11.0%	10.0%	12.2%	11.7%
TV Only	6.0%	7.0%	6.8%	7.3%
Online Only	4.0%	4.0%	4.1%	4.2%
Radio+Online	4.0%	5.0%	3.5%	4.0%
Radio+TV+Print	4.0%	3.0%	2.8%	3.1%
TV+Print+Online	2.0%	1.0%	1.4%	1.4%
Print+Online	0.0%	0.0%	0.8%	0.9%
Radio+Print	1.0%	0.0%	0.6%	0.6%
Radio+Print+Online	1.0%	0.0%	0.6%	0.5%
TV+Print	0.0%	0.0%	0.4%	0.4%
Print Only	0.0%	0.0%	0.1%	0.1%

2.6. Frequency of Media Consumption

The media consumption patterns observed in Q1 2024/25 show daily engagement for TV at 52%, with a decrease to 49% for TV in Q2 2024/25. From Q1 2024/25 to Q2 2024/25, there was a decrease in radio consumption from 49% to 48%, and in daily participation on social media, from 42% to 41%.

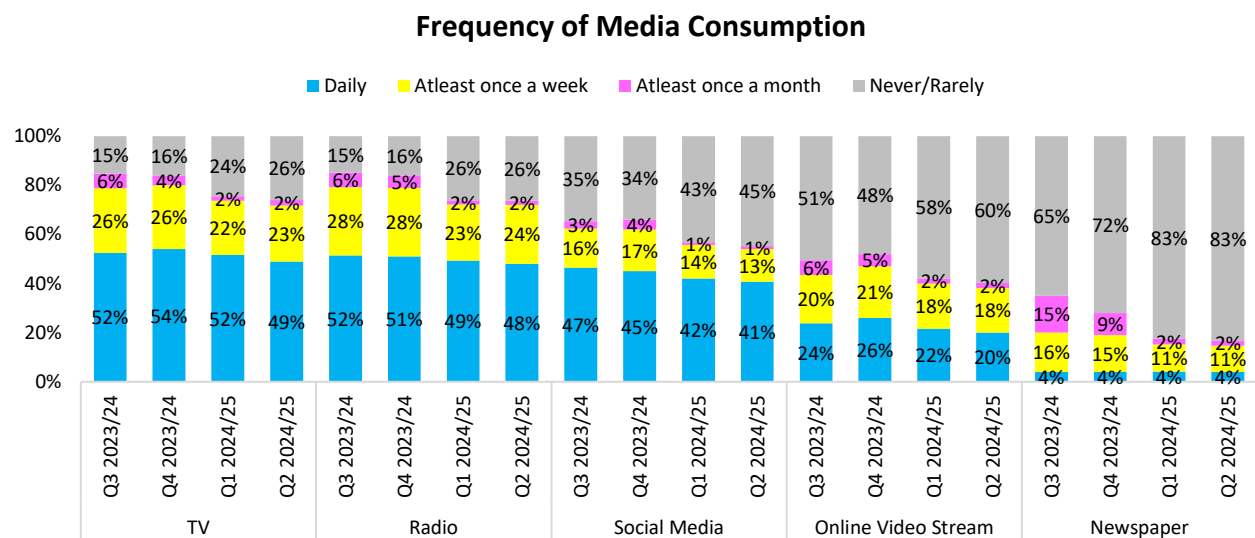


Figure 5: Frequency of consuming Tv, radio, social media, online streams and newspapers

2.7. Demographics of Media Consumers

Using population census projections, the media consumer population is indicated in the table. In addition, the demographics profiles of media audiences are illustrated below.

Table 5: Demographics of media consumers in Kenya – LSM, age, setting and gender

Demographics		Financial Year	Radio Listeners, n=24.2M	TV Viewers, n=24.3M	Newspaper Readership, n=5.6M	Online Usage, n=18.2M
Gender	Male	Q3 2023/24	52%	52%	70%	57%

		Q4 2023/24	52%	52%	74%	58%
		Q1 2024/25	52%	52%	68%	56%
		Q2 2024/25	51%	52%	66%	57%
	Female	Q3 2023/24	48%	48%	30%	43%
		Q4 2023/24	48%	48%	26%	42%
		Q1 2024/25	48%	48%	33%	44%
		Q2 2024/25	49%	48%	35%	43%
Age group	15-17 years	Q3 2023/24	12%	12%	12%	13%
		Q4 2023/24	12%	10%	12%	13%
		Q1 2024/25	11%	11%	12%	14%
		Q2 2024/25	11%	11%	12%	15%
	18-24 years	Q3 2023/24	21%	24%	23%	31%
		Q4 2023/24	20%	23%	21%	29%
		Q1 2024/25	20%	24%	19%	27%
		Q2 2024/25	20%	23%	21%	27%
	25-34 years	Q3 2023/24	26%	27%	28%	30%
		Q4 2023/24	24%	25%	26%	28%
		Q1 2024/25	23%	26%	30%	31%
		Q2 2024/25	23%	25%	29%	31%
	35-44 years	Q3 2023/24	20%	19%	19%	15%
		Q4 2023/24	17%	18%	16%	15%
		Q1 2024/25	19%	17%	19%	16%
		Q2 2024/25	19%	18%	19%	16%
45+ years	Q3 2023/24	20%	18%	18%	10%	
	Q4 2023/24	27%	24%	24%	14%	
	Q1 2024/25	28%	23%	20%	12%	
	Q2 2024/25	28%	23%	20%	12%	
Setting	Urban	Q3 2023/24	29%	36%	38%	43%
		Q4 2023/24	28%	34%	37%	44%
		Q1 2024/25	28%	35%	40%	41%
		Q2 2024/25	28%	35%	42%	43%
	Rural	Q3 2023/24	71%	64%	62%	57%
		Q4 2023/24	72%	66%	63%	56%
		Q1 2024/25	72%	65%	60%	59%
		Q2 2024/25	72%	65%	58%	57%
LSM Group	LSM 1 to 4	Q3 2023/24	19%	8%	3%	5%
		Q4 2023/24	15%	4%	1%	3%
		Q1 2024/25	15%	4%	2%	1%

		Q2 2024/25	17%	5%	2%	2%
LSM 5 to 7		Q3 2023/24	30%	28%	19%	19%
		Q4 2023/24	31%	32%	9%	20%
		Q1 2024/25	25%	23%	8%	12%
		Q2 2024/25	26%	25%	10%	14%
LSM 8 to 11		Q3 2023/24	41%	50%	57%	58%
		Q4 2023/24	40%	46%	59%	52%
		Q1 2024/25	45%	53%	54%	60%
		Q2 2024/25	43%	52%	53%	59%
LSM 12+		Q3 2023/24	10%	15%	21%	18%
		Q4 2023/24	14%	18%	31%	24%
		Q1 2024/25	16%	21%	37%	27%
		Q2 2024/25	15%	19%	35%	26%

3. Radio Listenership Section

3.1. Radio Listeners' Key Demographics

Among demographic groups, males generally show a stronger preference for radio consumption compared to females, with this trend being especially pronounced among older individuals. Additionally, radio listenership consistently increases with age.

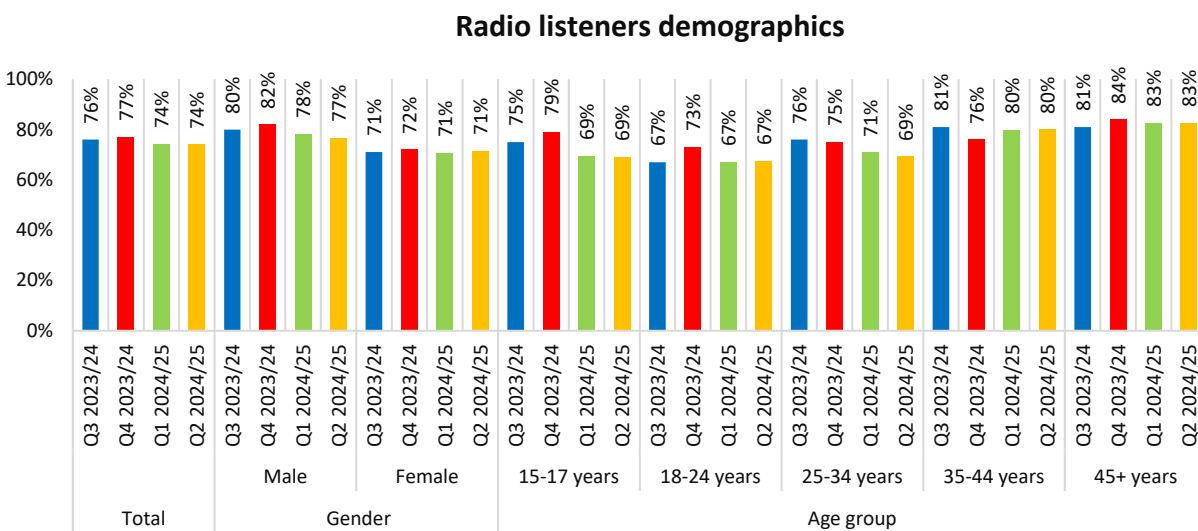


Figure 6: Demographics of radio consumers– by total, gender

The rural areas experience a greater listenership than urban areas whilst the lower LSMs exhibit the highest radio consumption as compared to the higher ones.

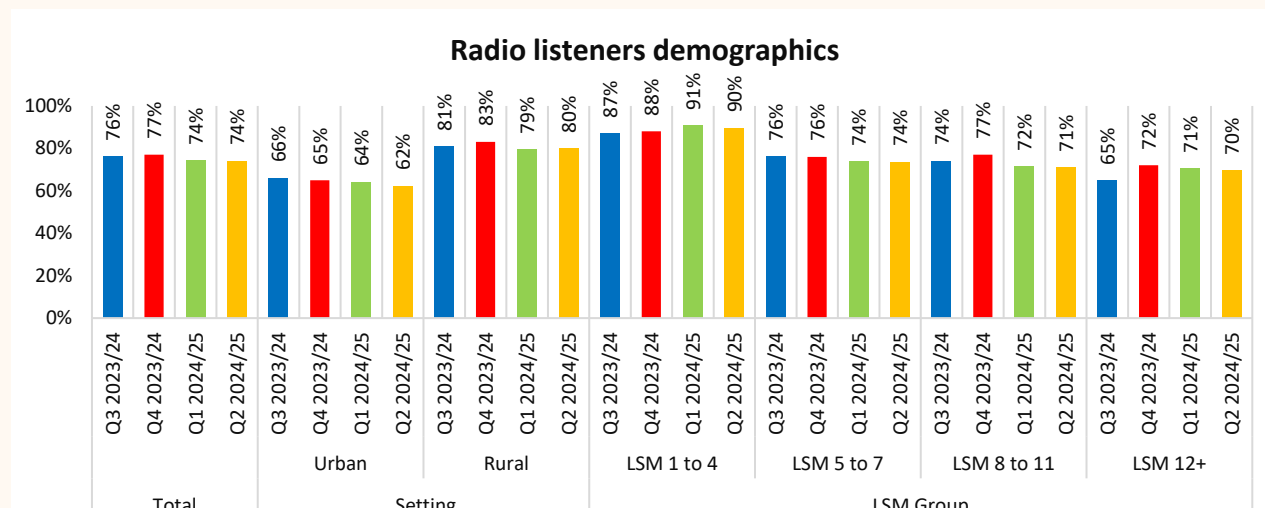


Figure 7: Demographics of radio consumers– by total, setting and LSM

Radio consumption is most prevalent in Lower Eastern and Western regions, while North Eastern shows the lowest rates of usage.

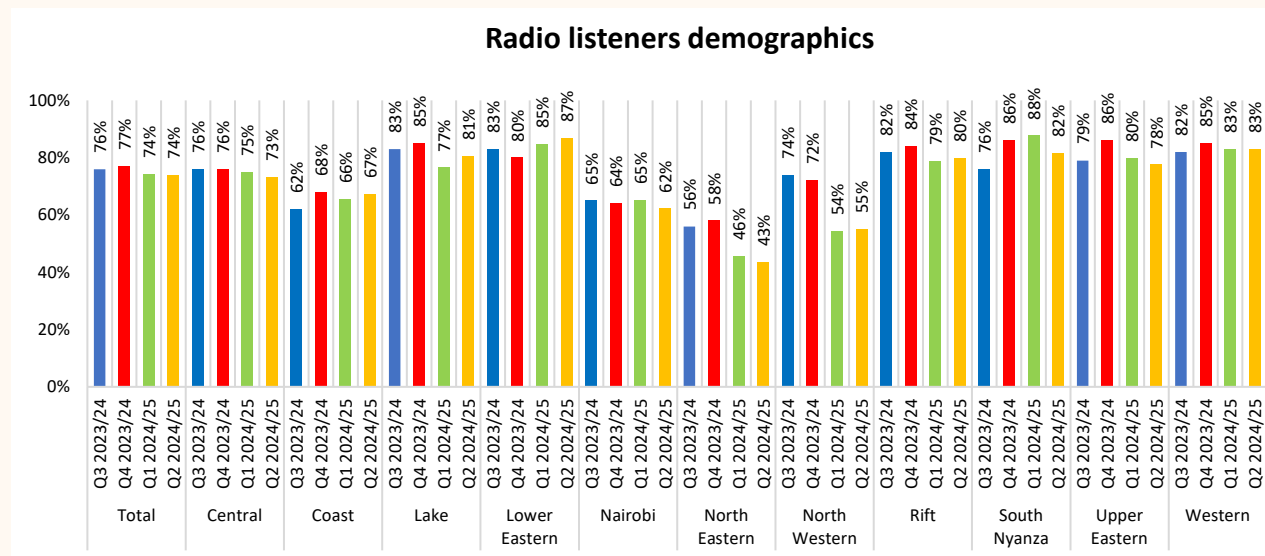


Figure 8: Demographics of radio consumers– by total, Topography

3.2. Radio Listenership Language

Swahili is the language most of the stations tuned into followed by vernacular. This observed across male and female listeners in all quarters.

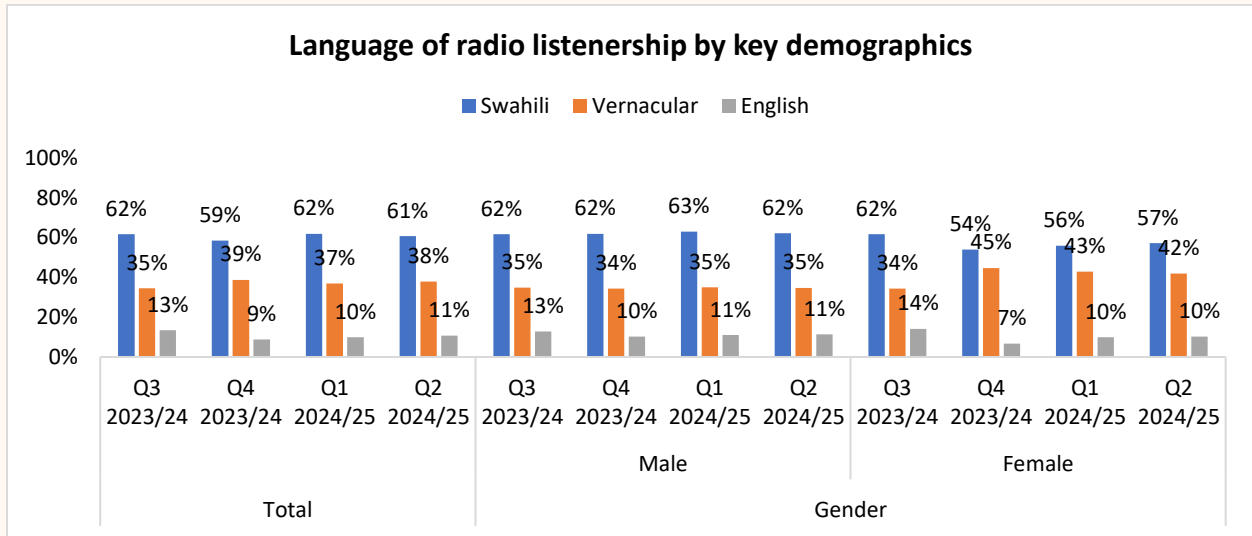


Figure 9: Radio listenership language by total and gender

Similar to the trend for age group, Swahili is also the language most of the stations tuned into across all age groups.

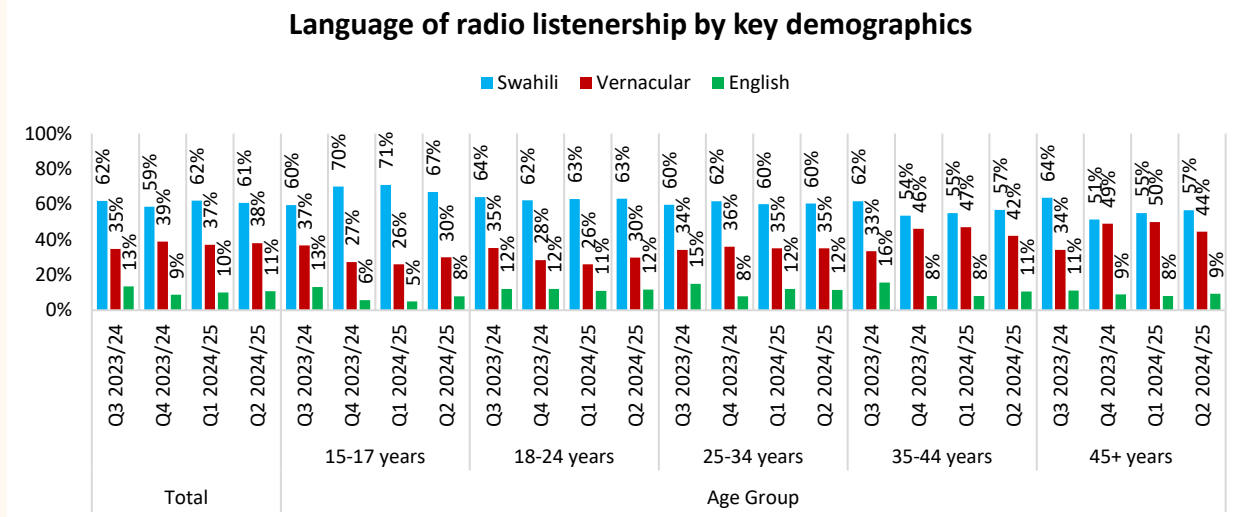


Figure 10: Radio listenership language by total & setting

Even though Swahili stations are the most tuned-in stations, there is higher usage of English stations in Urban areas compared to rural areas. This was observed only from Q4 2023/24 to Q2 2024/25.

Language of radio listenership by key demographics

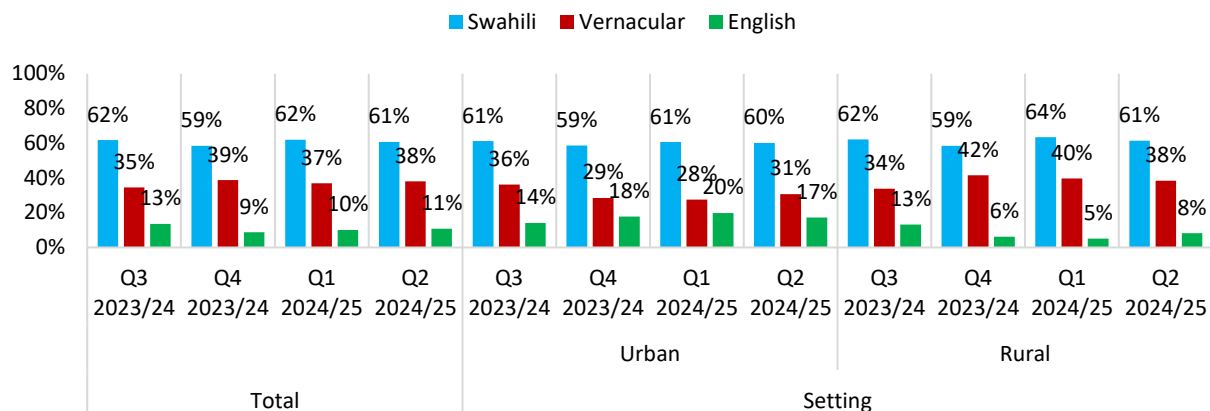


Figure 11: Radio listenership language by total & LSM

Kiswahili and vernacular are more commonly spoken by lower populations especially those in LSM 5 to 11. This might be due to its more frequent use in everyday conversations.

Table 6: Radio listenership language by total and topography

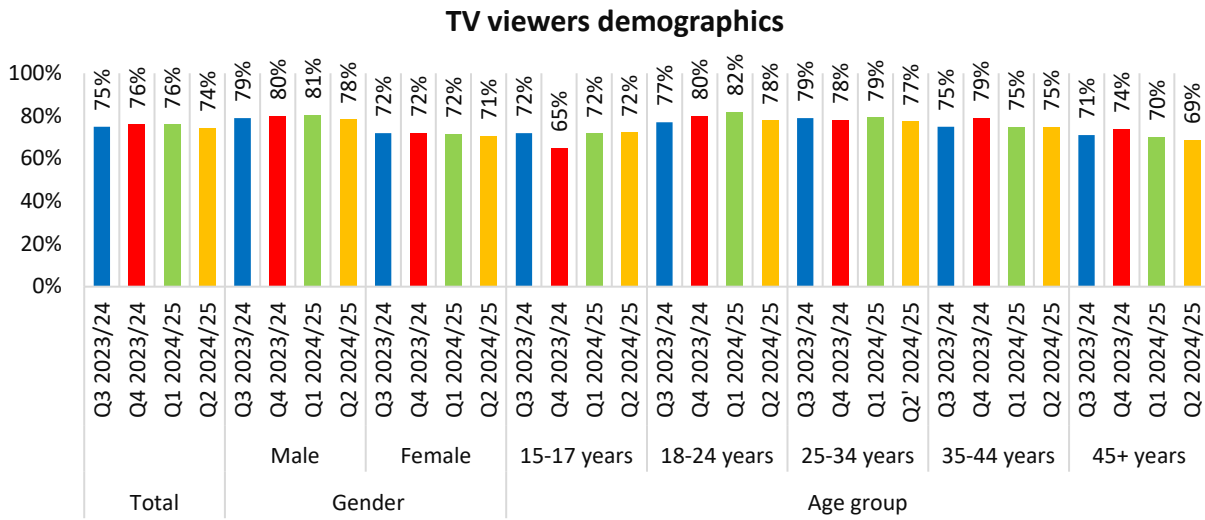
Total/ Topography		Financial Year	Radio listenership language		
			Swahili	Vernacular	English
Total		Q3 2023/24	62%	35%	13%
		Q4 2023/24	59%	39%	9%
		Q1 2024/25	59%	39%	9%
		Q2 2024/25	61%	38%	11%
Topography	Central	Q3 2023/24	62%	36%	12%
		Q4 2023/24	42%	54%	10%
		Q1 2024/25	43%	52%	11%
		Q2 2024/25	46%	51%	11%
	Coast	Q3 2023/24	62%	32%	16%
		Q4 2023/24	59%	32%	14%
		Q1 2024/25	61%	31%	15%
		Q2 2024/25	62%	32%	15%
	Lake	Q3 2023/24	60%	38%	13%
		Q4 2023/24	46%	60%	4%
		Q1 2024/25	47%	58%	4%
		Q2 2024/25	49%	55%	5%
Lower Eastern		Q3 2023/24	58%	35%	15%

		Q4 2023/24	33%	66%	6%
		Q1 2024/25	34%	64%	6%
		Q2 2024/25	40%	60%	9%
	Nairobi	Q3 2023/24	64%	34%	14%
		Q4 2023/24	66%	15%	24%
		Q1 2024/25	68%	15%	25%
		Q2 2024/25	67%	19%	21%
	North Eastern	Q3 2023/24	61%	33%	13%
		Q4 2023/24	51%	27%	27%
		Q1 2024/25	53%	26%	28%
		Q2 2024/25	54%	27%	23%
	North Western	Q3 2023/24	67%	25%	19%
		Q4 2023/24	66%	33%	10%
		Q1 2024/25	68%	32%	11%
		Q2 2024/25	67%	30%	13%
	Rift	Q3 2023/24	67%	30%	12%
		Q4 2023/24	68%	29%	8%
		Q1 2024/25	70%	28%	8%
		Q2 2024/25	68%	29%	9%
	South Nyanza	Q3 2023/24	59%	46%	15%
Q4 2023/24		79%	23%	5%	
Q1 2024/25		81%	22%	5%	
Q2 2024/25		75%	27%	8%	
Upper Eastern	Q3 2023/24	53%	39%	13%	
	Q4 2023/24	46%	51%	9%	
	Q1 2024/25	47%	49%	9%	
	Q2 2024/25	49%	46%	9%	
Western	Q3 2023/24	61%	35%	12%	
	Q4 2023/24	88%	15%	2%	
	Q1 2024/25	91%	15%	2%	
	Q2 2024/25	85%	17%	5%	

4. TV Viewership Section

4.1. TV Viewer's Key Demographics

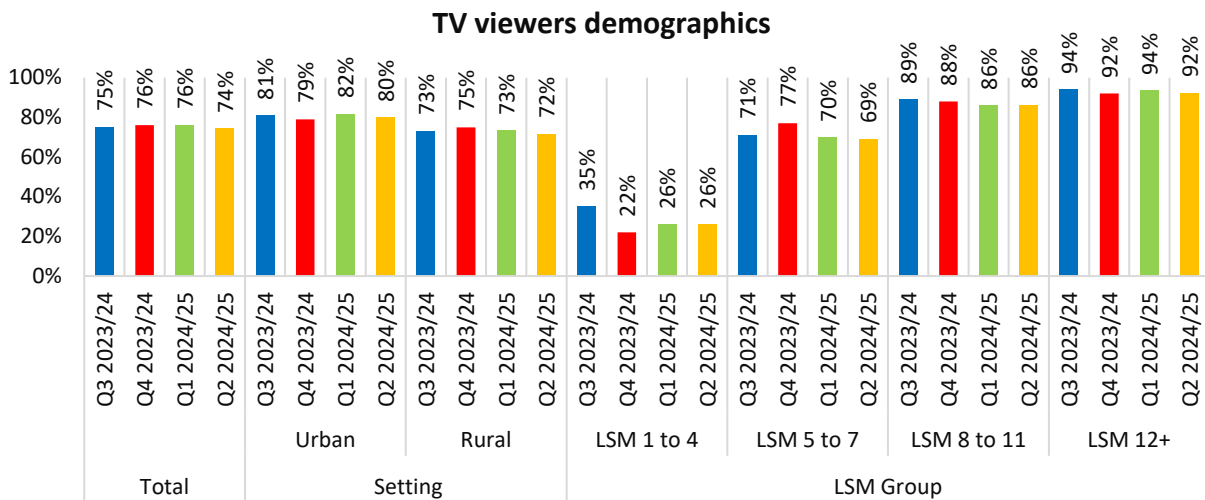
The data reveals gender gaps in TV watching, as males demonstrate greater interest across the four quarters. There is a decrease in viewership among 35 to 45+ year-olds, indicates TV networks and streaming services are producing less content targeted specifically at older people, ignoring their interests and concerns.



N=32.23M: All Respondents

Figure 12: TV Viewership demographics – by total, gender and age group

Viewership numbers decreased in the lower LSM 12+ segment, with a decrease of 2%. Conversely, viewership increases in the lower LSM 1 to 4 segment. These variations underscore the influence of socioeconomic factors, such as limited availability of television sets. This highlights the need for tailored strategies to address diverse demographic and socioeconomic factors in order to enhance TV viewership.



N=32.23M: All Respondents

Figure 13: TV Viewership demographics – by total, setting and LSM

Central and Nairobi regions have the highest TV viewership, with Rift region following closely behind. On the other hand, the lowest TV viewership is observed in the South Nyanza regions. These variations in TV viewership across different geographic areas highlight the significance of customizing media strategies to cater to specific regions.

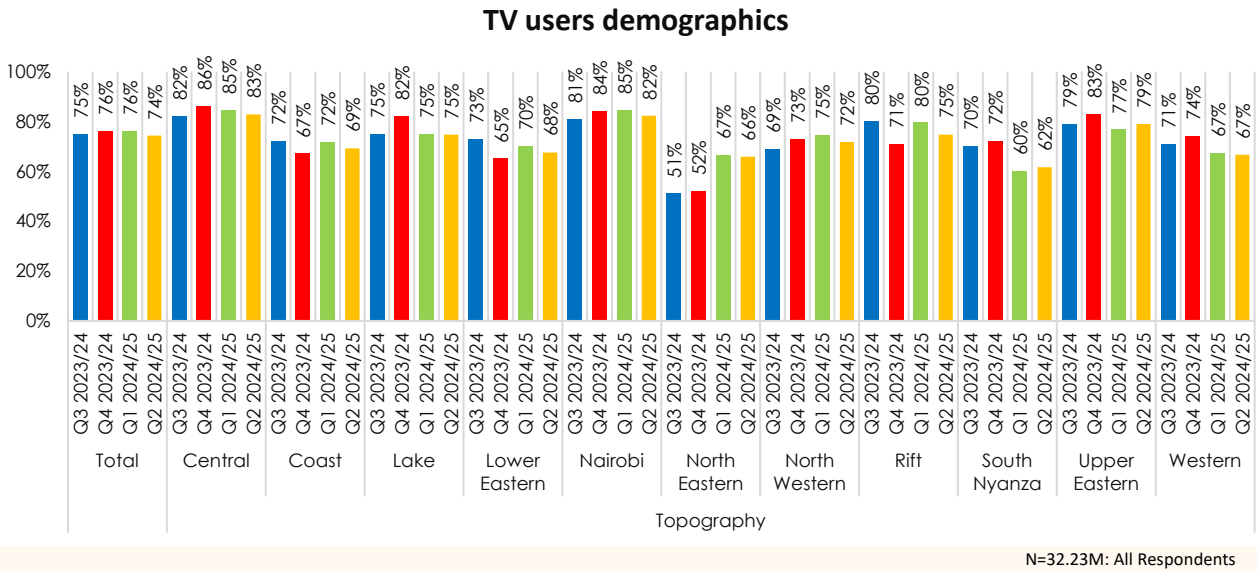


Figure 14: TV Viewership demographics – by total and topography

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, with it being higher for this age group than the older folk.

Pay TV vs Free to Air (FTA)

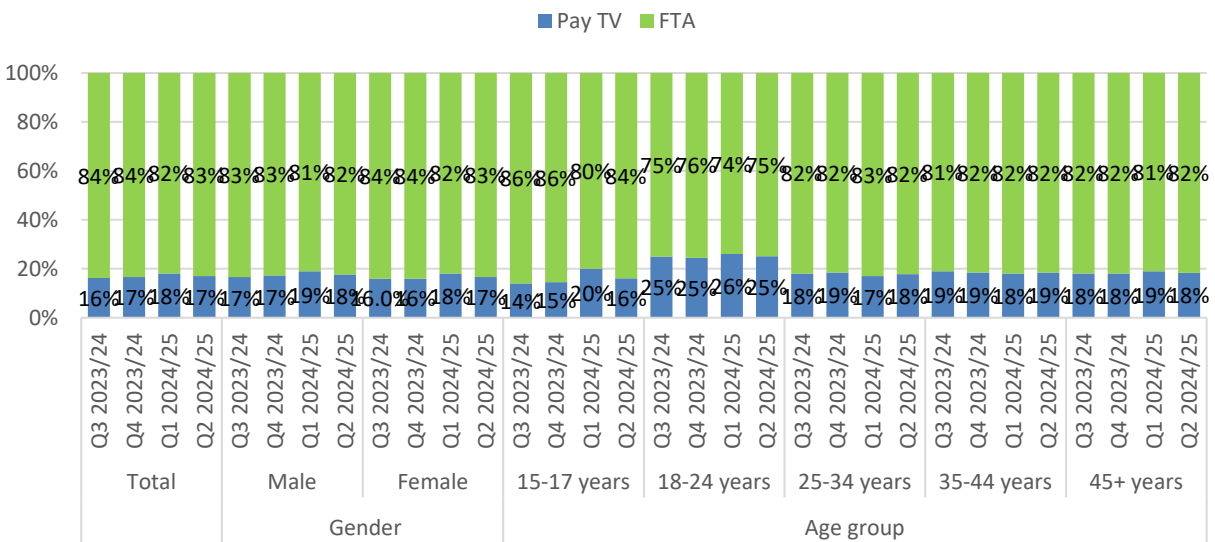
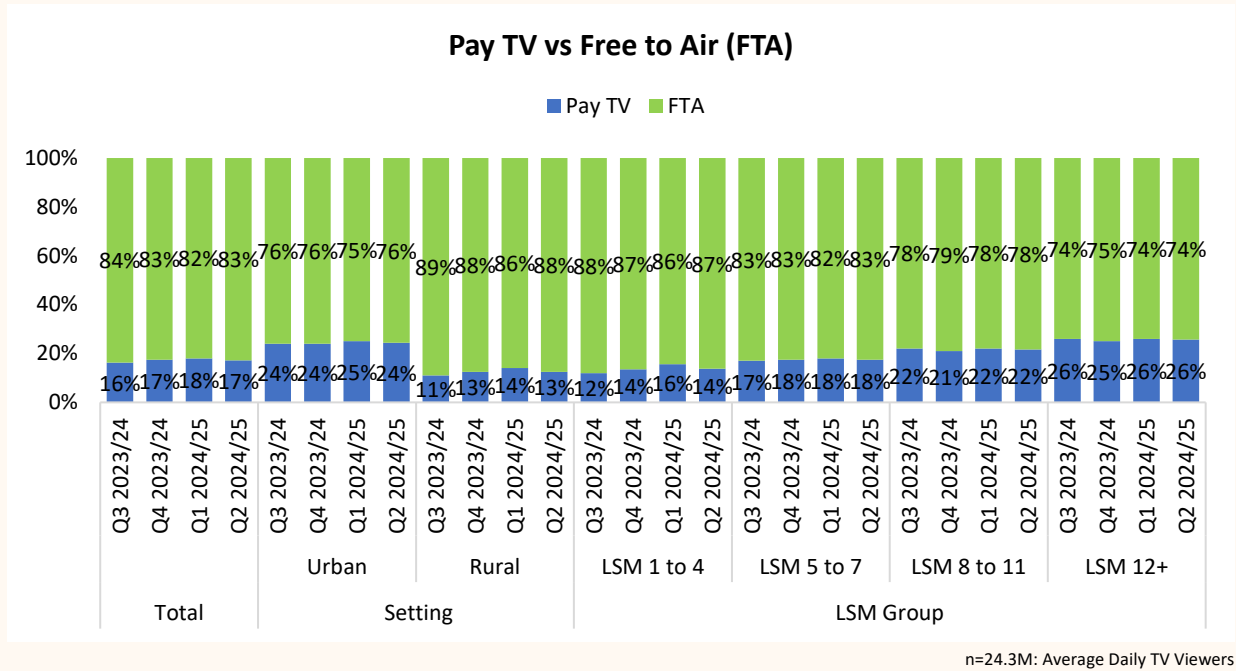


Figure 15: Pay TV vs Free to Air TV Reach – total, gender and age

In urban areas, pay TV access is higher than rural areas. It is also higher amongst those of LSM 12+.



4.3. Exposure to impact of advertising

The optimal time for advertising impact is between 20:00 and 22:00, where both audience size and the number of ad spots peak, maximizing exposure potential. Audience size begins to grow significantly after 18:00, aligning with an increase in ad placements, making the evening hours critical for effective campaigns. After 22:00, both metrics decline sharply, indicating reduced exposure during late-night hours. Early morning (00:00–06:00) shows minimal audience size despite consistent ad placements, suggesting limited effectiveness during this period. A moderate growth in audience size from 12:00 to 18:00, coupled with a gradual rise in ad spots, provides secondary opportunities before the evening peak.

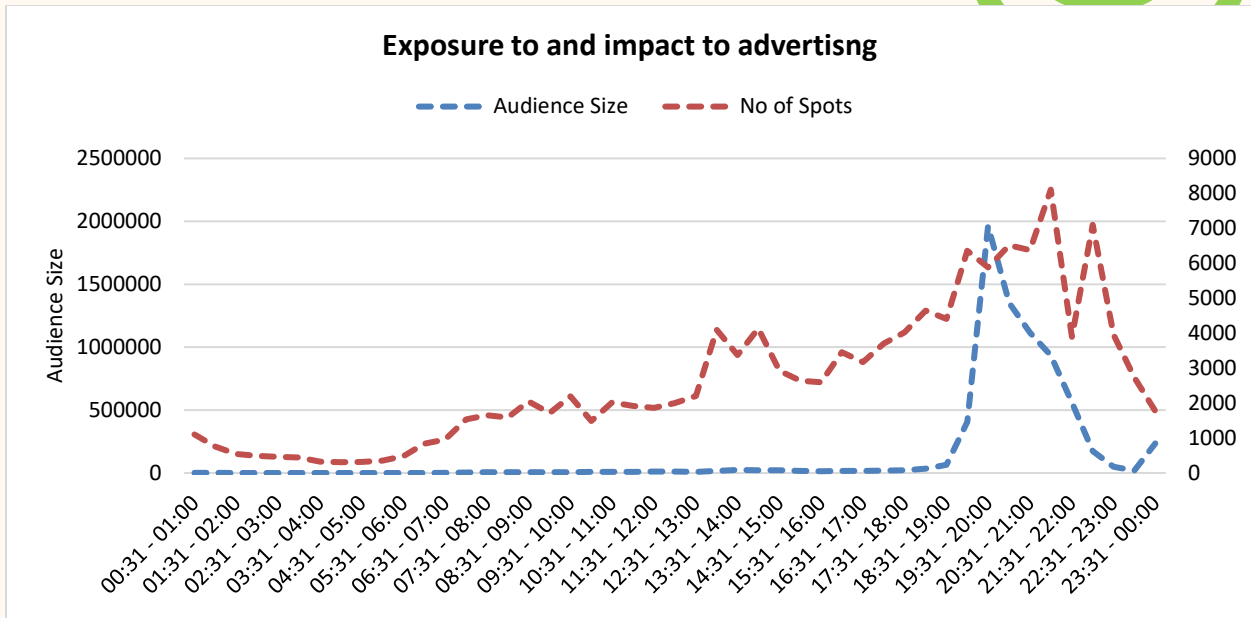
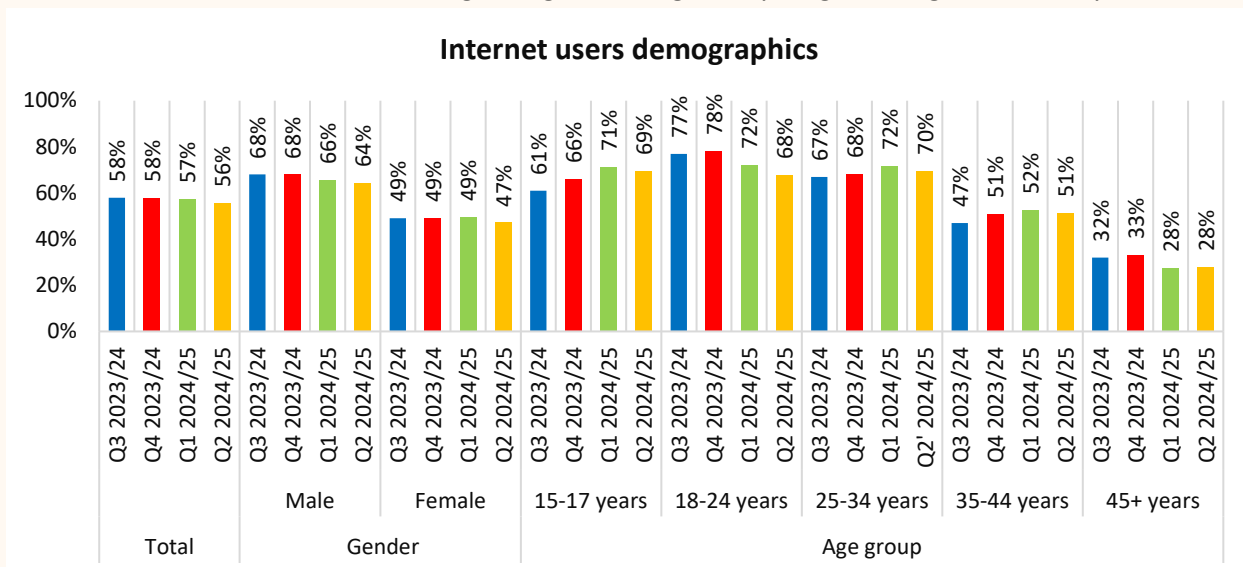


Figure 16: TV exposure to and impact to advertising

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 under 34 years.



n=19.0M: Average Internet Users

Figure 17: 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. Additionally, urban areas have better socioeconomic resources, fostering greater penetration of digital devices and technology adoption compared to rural regions. Higher Living Standards Measure (LSM) scores are associated with increased internet usage.

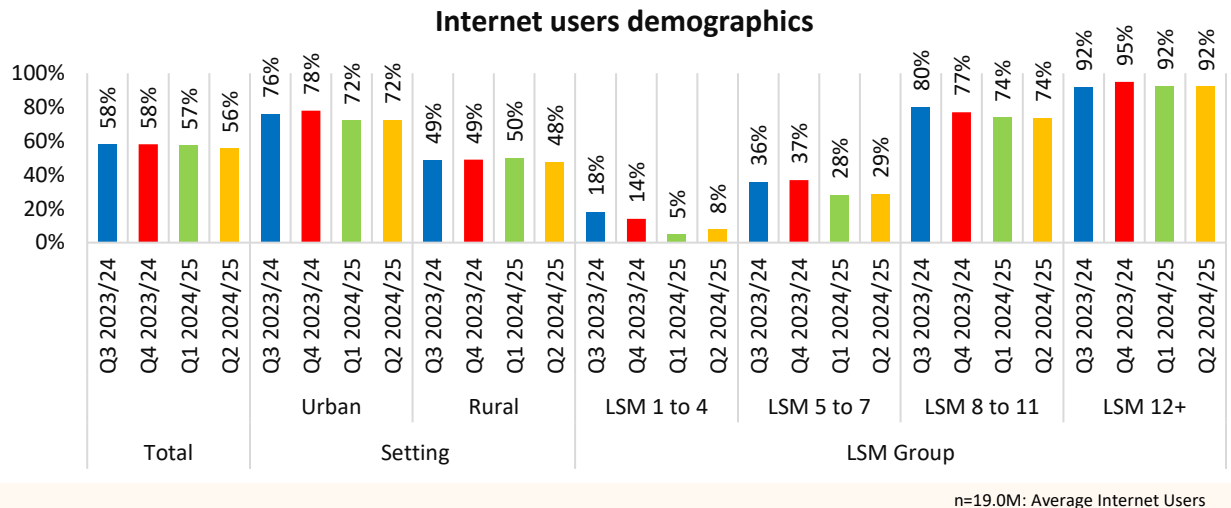


Figure 18: Internet users' demographics – total, setting and LSM

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

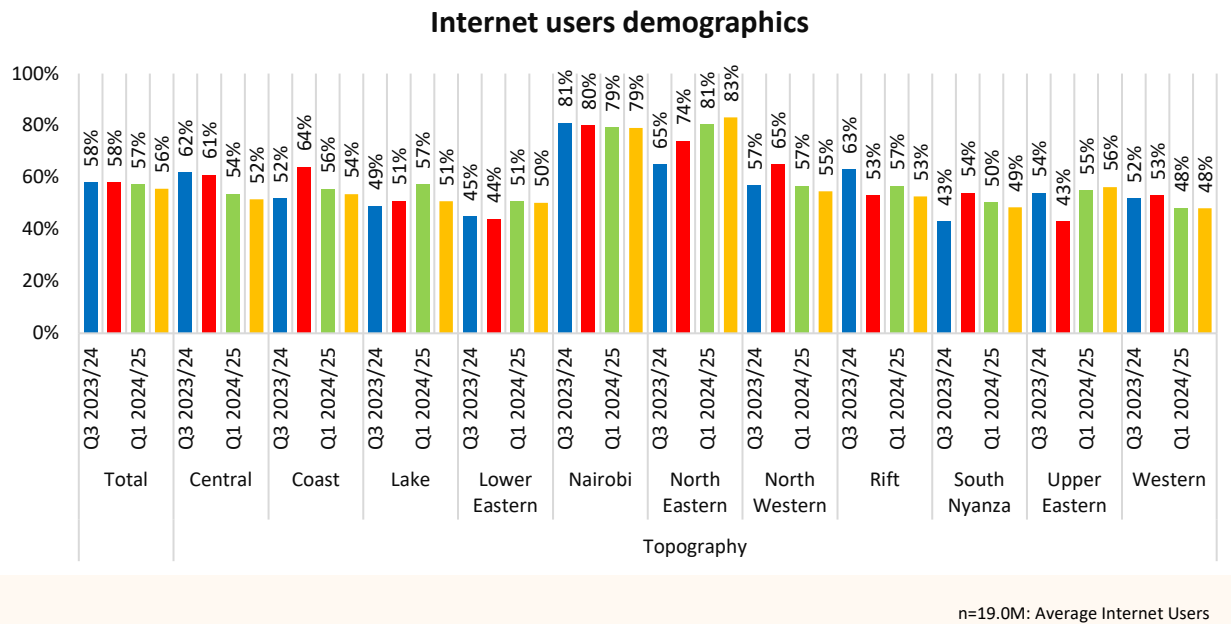


Figure 19: Internet users' demographics – total and topography

5.2. Devices Used

The Most people access the internet mainly through smartphones, highlighting how important these devices are for connecting people and providing information. As mobile technology improves, it's essential to make sure everyone has access to smartphones to promote digital inclusion and close the connectivity gaps among different groups.

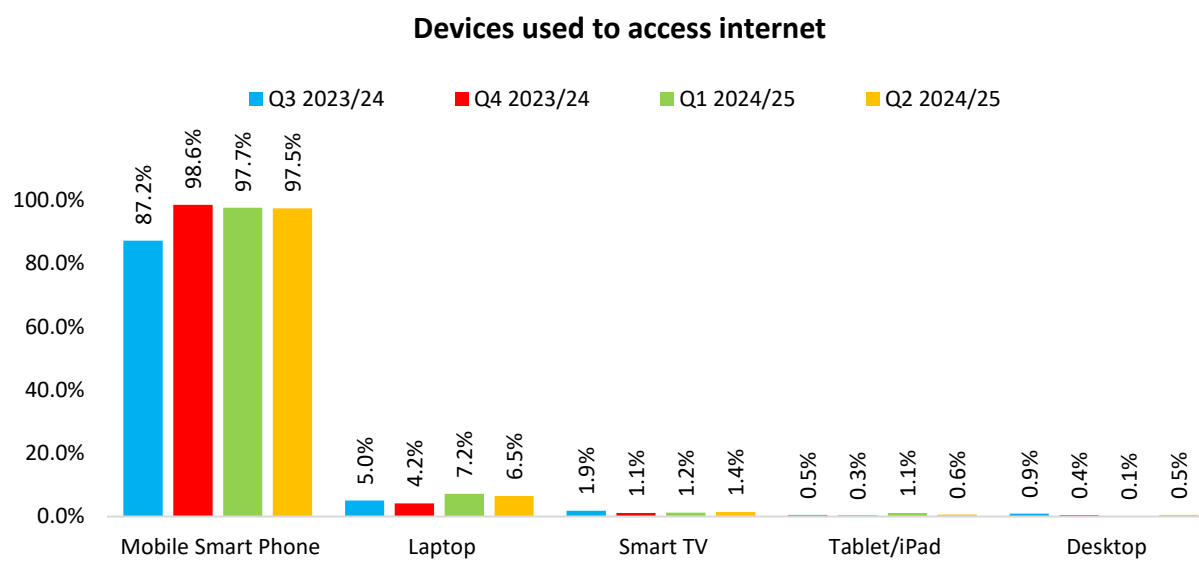


Figure 20: Devices used to access the internet

5.3. Social Media Platforms

Facebook and WhatsApp are the most popular social media platforms in Kenya, followed by TikTok and YouTube in third and fourth place. The frequent mention of Facebook and WhatsApp shows how widely they are used and how influential they are in Kenya's digital space.

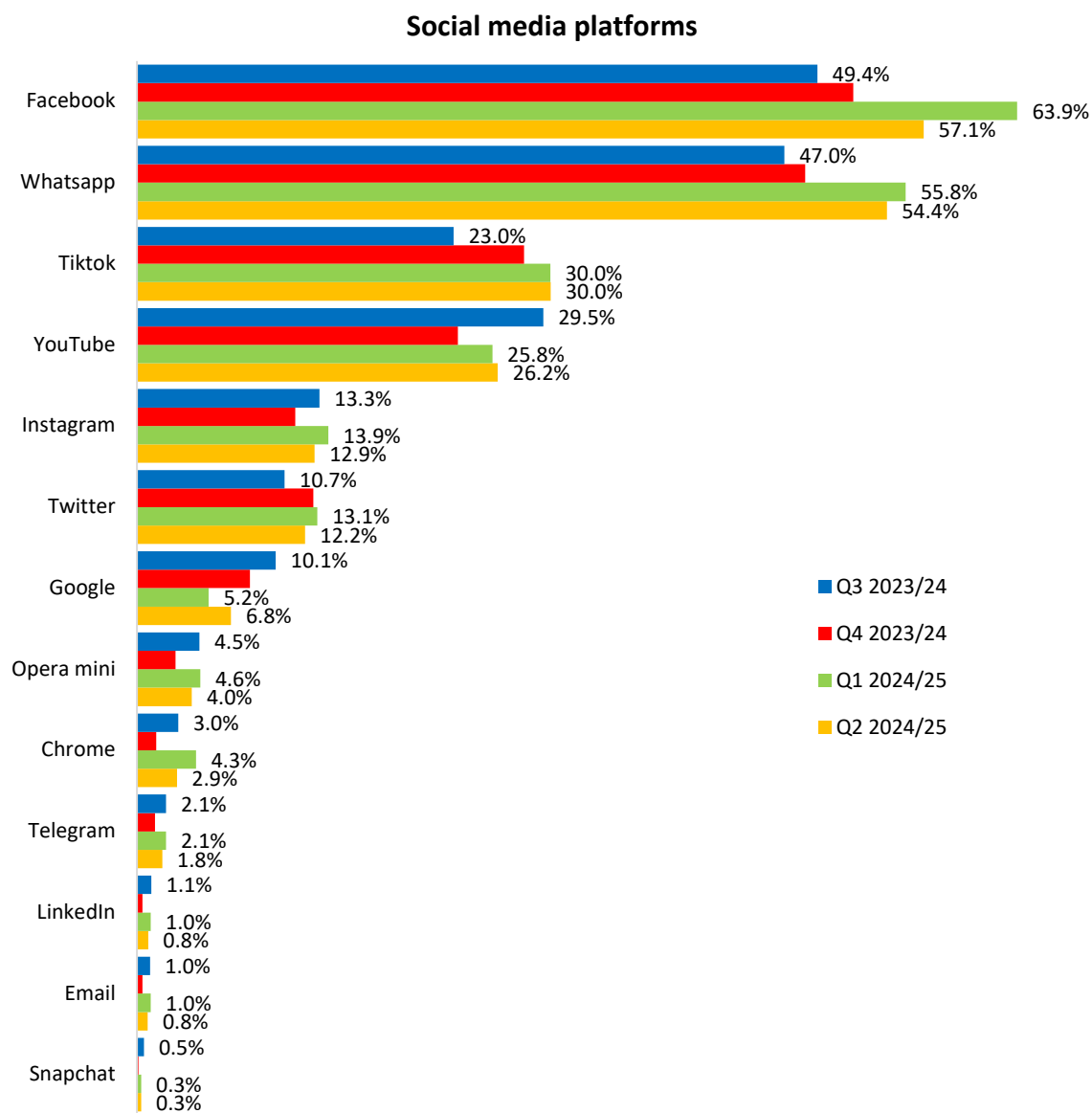
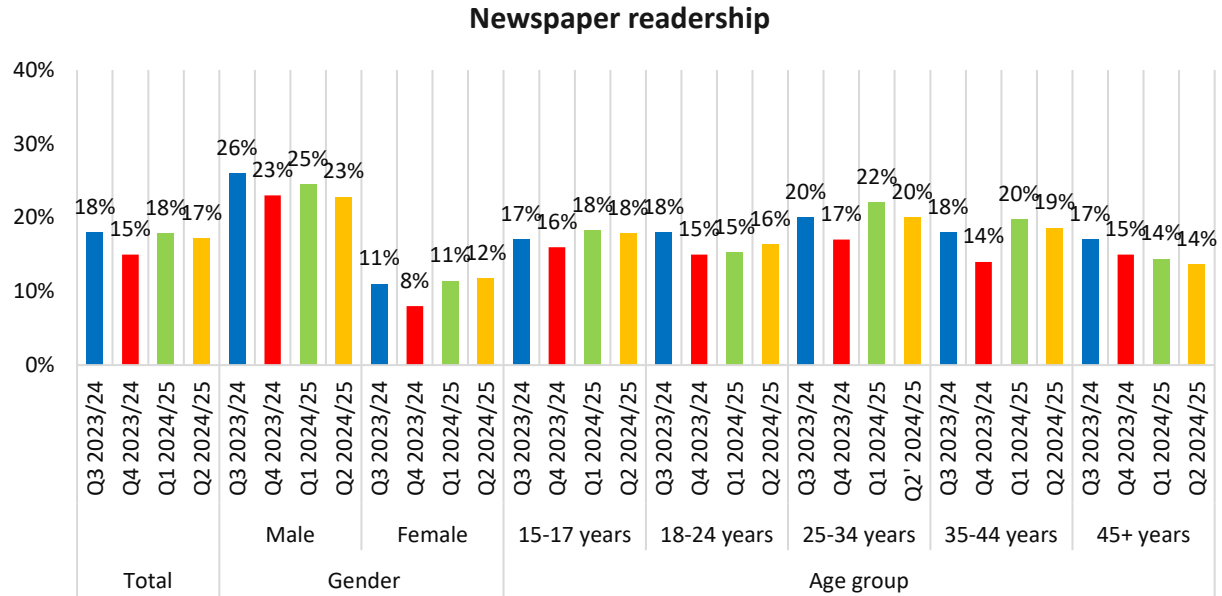


Figure 25: Popular social media platforms

6. Newspaper Readership

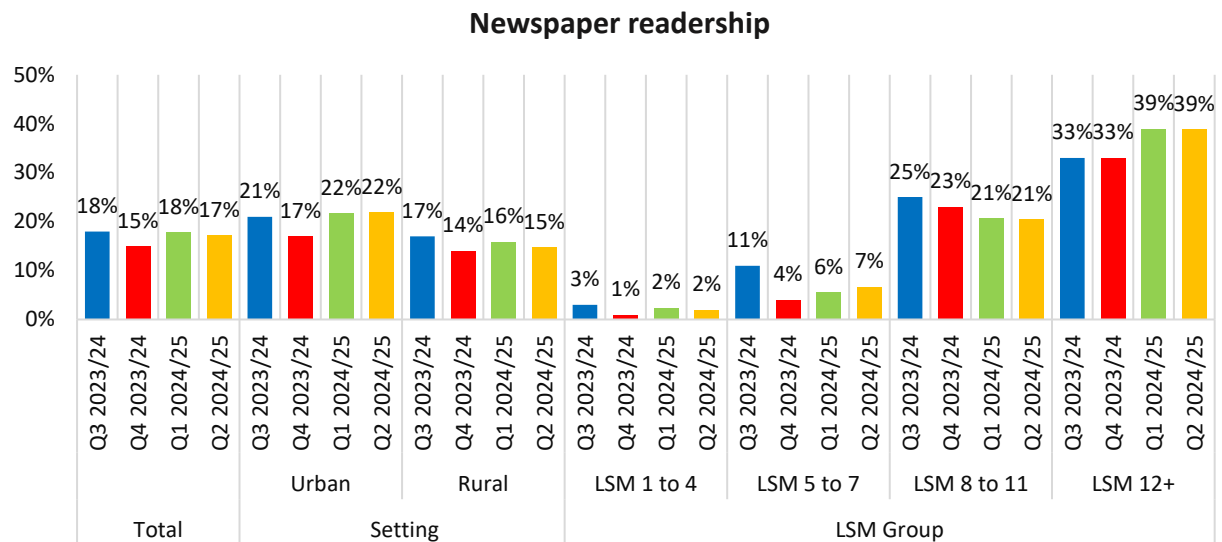
There are more males who read newspapers as compared to females. In terms of age, 25-34 years tend to read newspapers more than other age groups.



n=32.2M: All Respondents

Figure 21: Newspaper readership demographics – by total, gender and age

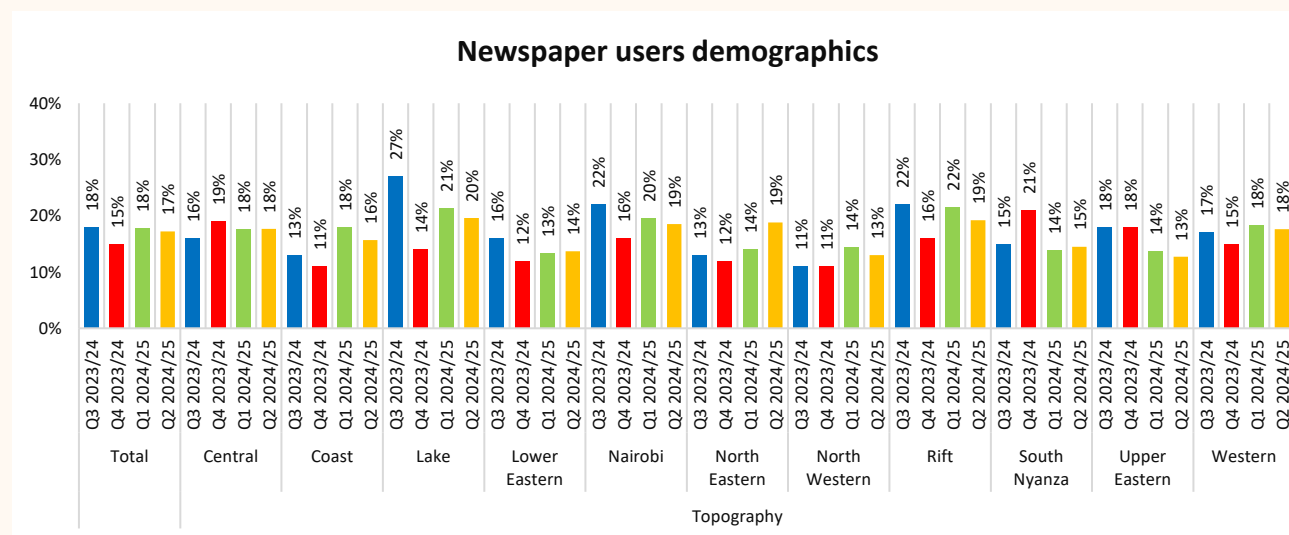
The urban areas and higher LSMs have a higher incidence of readership.



n=32.2M: All Respondents

Figure 22: Newspaper readership demographics – by total, setting and LSM

In Q2 2024/25, higher newspaper readership incidences are reported in the Lake, North Eastern, Rift and Nairobi topographies. There has been a slight decrease in readership in the Rift topographies from 22% to 19%.



n=32.2M: All Respondents

Figure 23: Newspaper readership demographics – by total and topography

7. Advertising Expenditure

7.1. Advertising Expenditure Overview

Overall industry spending grew by 11%. The industry's total spending increased from Kes 18 billion to 20 billion between Q1 2024/25 and Q2 2024/25.

Sectors	Q3 2023/24	Q4 2023/24	Q1 2024/25	Q2 2024/25	CHANGE (Q2-Q1)
Financial Services	2,285	2,876	2,262	2,136	-6%
Media	1,996	2,371	3,544	3,031	-14%
Corporate & Multi-brand	1,517	1,873	1,753	1,670	-5%
Betting & Gaming	1,403	1,063	2,507	1,738	-31%
Personal Care	1,304	1,479	1,572	1,160	-26%
Communications	1,166	1,749	1,134	1,343	18%
Beverage	925	1,309	594	822	38%
Property & Building & Acc.	831	1,335	1,126	864	-23%
Household	619	797	524	486	-7%
Foods	612	855	810	1,663	105%
Publishing & Education	520	473	505	496	-2%
Tourism & Entertainment	506	421	461	953	107%
Transport	506	426	252	360	43%

Veterinary & Agriculture	418	593	336	697	107%
Retail	307	235	533	2,232	319%
Pharmaceuticals	259	443	395	537	36%
Office Equipment & Supplies	173	338	16	27	68%
Clothing, Fabrics & Footwear	23	23	42	89	112%
Total	15,370	18,659	18,368	20,303	11%

Table 7: Advertising Expenditure

Key: Figures in KES Millions (000,000)

Specifically, TV has the greatest spending, with radio coming in second. Media have the highest spending in TV while Financial Services on radio. Corporate & Multi-brand have the highest spending in print.

Table 8: Advertising Expenditure for radio, TV & print

Sectors	TV	Radio	Print	Total	Share of Spending (SOS)
Media	1,687	946	399	3,031	15%
Retail	1,443	764	25	2,232	11%
Financial Services	992	975	169	2,136	11%
Betting & Gaming	1,150	584	4	1,738	9%
Corporate & Multibrand	727	339	604	1,670	8%
Foods	1,220	441	1	1,663	8%
Communications	770	566	7	1,343	7%
Personal Care	1,045	115	0	1,160	6%
Tourism & Entertainment	685	219	48	953	5%
Property & Building & Acc.	704	122	37	864	4%
Beverage	375	442	6	822	4%
Veterinary & Agriculture	237	459	2	697	3%
Pharmaceuticals	414	115	8	537	3%
Publishing & Education	336	110	51	496	2%
Household	284	192	10	486	2%
Transport	109	203	48	360	2%
Clothing, Fabrics & Footwear	60	24	5	89	0%
Office Equipment & Supplies	24	2	0	27	0%
Grand Total	12,262	6,617	1,425	20,303	100%

Key: Figures in KES Millions (000,000)

7.2. Year to Date Advertising Trends

While electronic media showed positive trends, media purchasing witnessed an -2% drop by the end of the October 2025 then a positive growth trend to 6% in November and drop of -2% at end of December 2025.

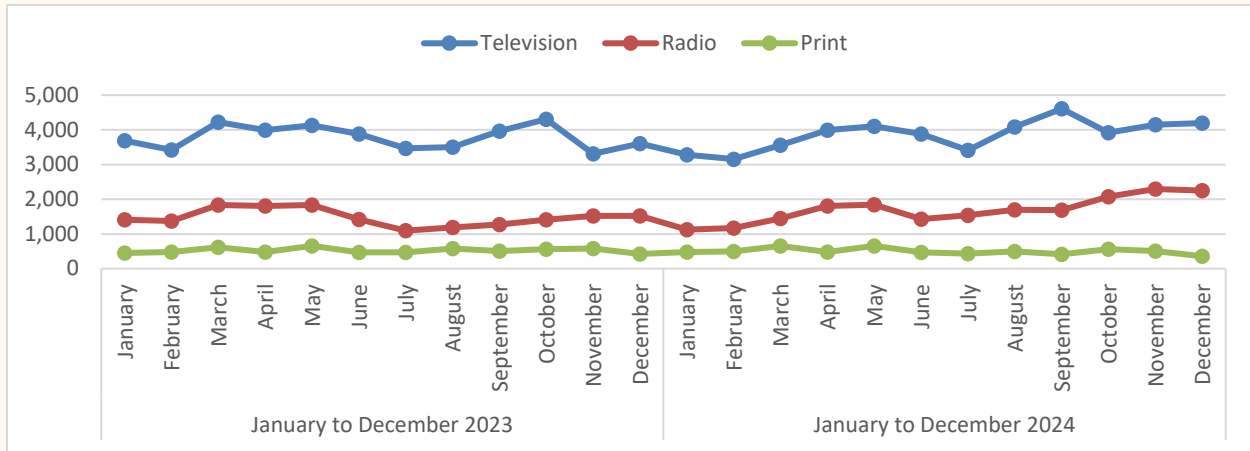


Figure 24: Advertising spends Jan 2023 to September 2024
Key: Figures in KES Millions (000,000)

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.

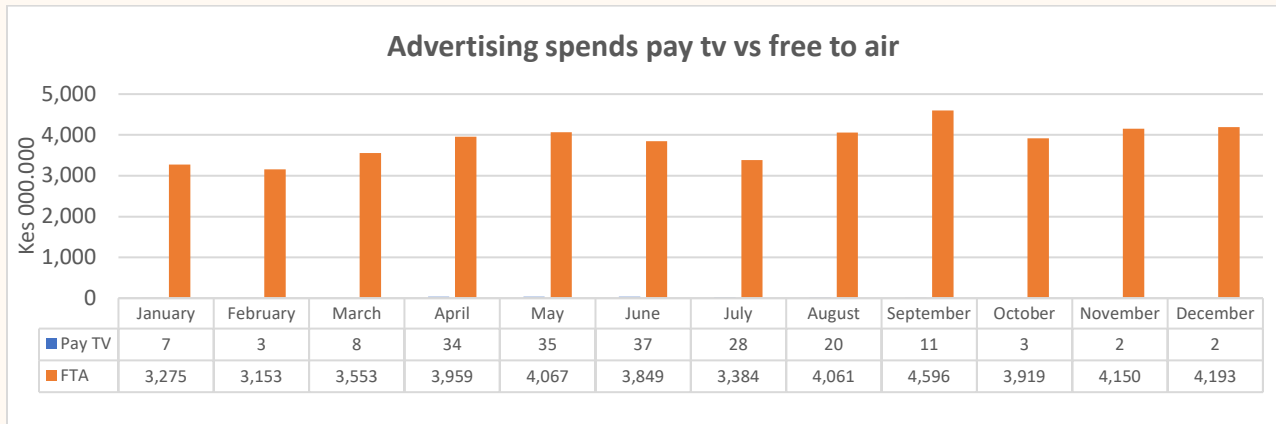


Figure 25: Advertising spends pay TV and free to air TV
Key: Figures in KES Millions (000,000)

7.4. TV Spends by Sector/Industry

Media space competition, thematic campaigns, and seasonality were crucial drivers of media buying within the TV medium. During this period, messaging prominently featured aspects such as offers, effectiveness, accessibility, quality, affordability, and distinctiveness.

Table 9: TV spends by sector/industry

Sector/ Industry	Q3 2023/24	Q4 2023/24	Q1 2024/25	Q2 2024/25
Media	1619	1619	2330	1687
Retail	164	164	383	1443
Foods	709	709	539	1220
Betting & Gaming	794	794	1871	1150
Personal Care	1277	1277	1435	1045
Financial Services	1541	1541	1156	992
Communications	1145	1145	823	770
Corporate & Multibrand	831	831	798	727
Property & Building & Acc.	1043	1043	1022	704
Tourism & Entertainment	208	208	378	685
Pharmaceuticals	331	331	287	414
Beverage	857	857	283	375
Publishing & Education	316	316	300	336
Household	566	566	304	284
Veterinary & Agriculture	80	80	63	237
Transport	207	207	79	109
Clothing, Fabrics & Footwear	19	19	37	60
Office Equipment & Supplies	273	273	12	24

Key: Figures in KES Millions (000,000)

7.5. Radio Spends by Sector/Industry

Retail and the highest advertising spend on radio followed by financial services.

Table 10: Radio spends by sector/industry

Sector	Q3 2023/24	Q4 2023/24	Q1 2024/25	Q2 2024/25
Retail	114	54	136	598
Financial Services	833	1114	950	378
Media	278	322	760	375
Communications	302	585	304	298
Betting & Gaming	600	229	629	259
Beverage	211	442	310	243
Veterinary & Agriculture	267	506	271	213
Foods	164	144	269	139
Personal Care	94	201	137	100
Corporate & Multibrand	281	356	405	89
Tourism & Entertainment	86	206	68	71
Household	89	221	210	71

Property & Building & Acc.	59	243	72	54
Transport	129	180	139	44
Pharmaceuticals	77	105	94	43
Publishing & Education	124	101	158	13
Clothing, Fabrics & Footwear	3	2	4	7
Office Equipment's & Supplies	32	64	2	1

Key: Figures in KES Millions (000,000)

7.6. Print Spends by Sector/Industry

The highest spends distribution is on corporate & multi-brand and media in Q2 to Q4. A notable decrease in Q2 2024/25.

Table 11: Print spends by sector/industry

SECTOR	Q3 2023/24	Q4 2023/24	Q1 2024/25	Q2 2024/25
Corporate & Multibrand	685	757	686	604
Media	341	492	430	399
Financial Services	117	153	221	169
Publishing & Education	87	79	56	51
Transport	34	20	40	48
Tourism & Entertainment	153	18	7	48
Property & Building & Acc.	25	26	48	37
Retail	24	7	17	25
Household	11	10	10	10
Pharmaceuticals	11	6	7	8
Communications	16	6	19	7
Beverage	4	1	10	6
Clothing, Fabrics & Footwear	9	4	3	5
Betting & Gaming	43	45	40	4
Veterinary & Agriculture	2	1	7	2
Foods	3	2	2	1
Office Equipment & Supplies	2	1	1	0

Key: Figures in KES Millions (000,000)

8. CHALLENGES AND OPPORTUNITIES FOR THE BROADCASTING INDUSTRY IN KENYA

Challenges in the Broadcasting Industry in Kenya

❖ Competition in a Saturated Market

- The market is crowded with numerous TV and radio stations, which makes it difficult for any single station to capture a large share of the audience. This intense competition affects advertising revenue, as advertisers have more options and can demand lower rates.

❖ Shifting Consumer Preferences

- A growing number of Kenyans, especially younger audiences, are turning to digital platforms and social media for news, entertainment, and information. This reduces the audience base for traditional media, impacting their reach and advertising potential.
- The decline in consumption of traditional print media further compounds the problem, as TV and radio struggle to adapt to changing habits.

❖ Technological Advancements and Costs

- The shift to digital broadcasting in 2015 has brought opportunities but also significant financial burdens for broadcasters, especially smaller players that struggle with the cost of upgrading equipment and maintaining quality broadcasts.

❖ Unbalanced Advertising Expenditure

- Advertisers focus their budgets on a few major broadcasters, leaving smaller stations with limited revenue. This uneven distribution makes it harder for smaller players to sustain operations.

Opportunities in the Broadcasting Industry in Kenya

❖ Digital Transformation and Online Platforms

- The increasing internet penetration (especially through mobile devices) provides broadcasters with an opportunity to distribute content online. Livestreaming, on-demand services, and integration with social media can attract new audiences, especially younger demographics.

❖ Localized and Vernacular Content

- The diversity of Kenya's population creates an opportunity for broadcasters to produce region-specific and vernacular content.
- Adapting content to specific regions or linguistic groups enhances audience loyalty and broadens reach in rural areas.

❖ Mobile Accessibility

- With mobile phones becoming the primary device for internet access in Kenya, broadcasters can use mobile-friendly formats such as apps, podcasts, and short-form videos to reach wider audiences.