



AUDIENCE MEASUREMENT AND INDUSTRY TRENDS REPORT

(January-March 2025)

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1. INTRODUCTION

Kenya's media industry is recognized for its rich diversity and continuous growth. The country hosts a thriving radio sector, with 300 stations broadcasting in a range of local and vernacular languages. The shift to digital terrestrial broadcasting in 2015 significantly boosted the television landscape. At the same time, the widespread use of mobile phones has helped Kenya achieve one of the highest internet penetration rates in Africa, allowing citizens extensive access to digital platforms.

However, these technological strides exist alongside a complex and highly competitive environment. Media outlets face constant pressure to attract and retain diverse audiences whose content preferences are rapidly evolving. Against this backdrop, research becomes an indispensable tool. It enables media companies, regulators, and other stakeholders to gain deeper insights into audience habits, spot emerging trends, and assess how various platforms are performing. Research helps uncover unmet needs and fresh opportunities, which in turn drives the creation of more strategic, audience-focused content.

As digital transformation reshapes how content is consumed, research supports broadcasters in adapting to new technologies and delivery methods helping them stay relevant and competitive. Ultimately, sustained investment in research is key to building a resilient and forward-looking media industry in Kenya's fast-changing digital era.

2. MEDIA AUDIENCE MEASUREMENT

2.1. Ways in Which Media is Consumed

Throughout the four quarters, consumption patterns remained consistent. These findings further underscore the strong role of mobile phones in digital media access, especially for social media, and the continued importance of traditional devices for legacy media like radio and TV. The consistency across quarters suggests entrenched consumption habits, with gradual shifts hinting at future trends in media convergence and mobile integration.

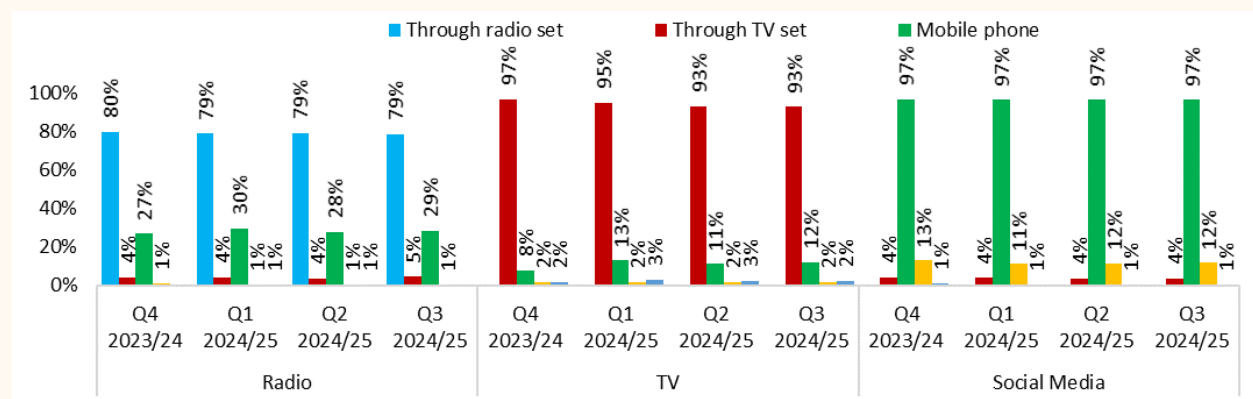


Figure 1: Ways in which media is consumed by total

2.2. Place of Media Consumption

From Q1 to Q3 of 2024/25, media consumption patterns by place have remained largely consistent. The home continues to be the primary location 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			
	Q4 2023/24	Q1 2024/25	Q2 2024/25	Q3 2024/25	Q4 2023/24	Q1 2024/25	Q2 2024/25	Q3 2024/25	Q4 2023/24	Q1 2024/25	Q2 2024/25	Q3 2024/25
At own home	89%	90%	89%	89%	85%	87%	87%	86%	87%	86%	86%	86%
Place of work	3%	3%	4%	4%	5%	4%	3%	3%	4%	4%	4%	4%
Bar/Restaurant/Hotel	2%	2%	2%	2%	2%	2%	2%	3%	6%	6%	7%	7%
Someone else's household	2%	2%	3%	2%	2%	2%	2%	2%	3%	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%	3%	2%	2%	2%	0%	0%	0%	0%
On the move	1%	1%	0%	1%	1%	1%	1%	1%	0%	0%	0%	0%

2.3. Access and usage of traditional media & digital media

Over the past four quarters, media access and usage patterns have remained relatively stable. Radio and television continue to be the most accessed media channels, showing little to no change over time. Internet usage experienced remained the same. Interestingly, newspaper saw a small increase in readership in the most recent quarter, reversing a previously declining trend.

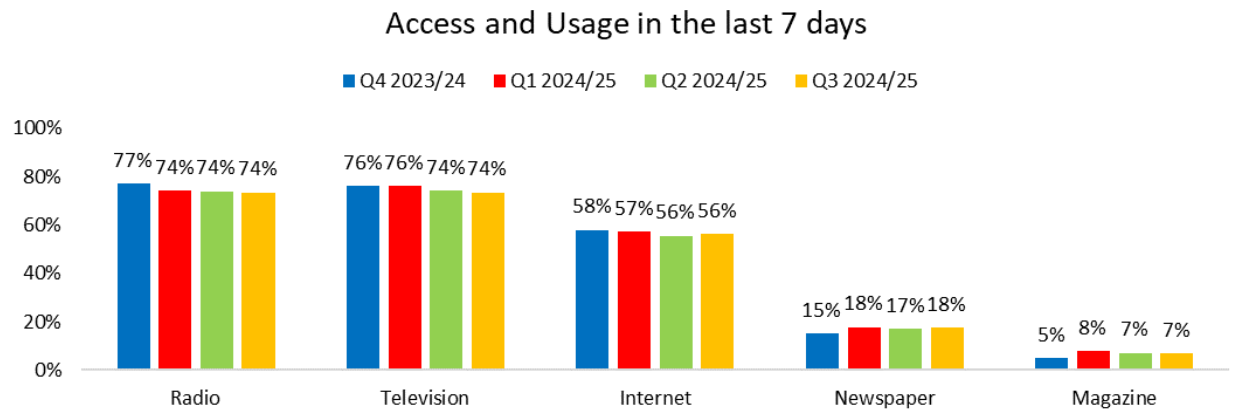


Figure 2: Access and Usage of media by total

The results highlight a clear gender gap in media consumption patterns. Across all quarters, male respondents consistently reported higher engagement with traditional and digital media compared to their female counterparts. Men are more likely to consume television and radio content, and they also demonstrate greater engagement with online platforms, including internet-based news sources. Additionally, print media such as newspapers and magazines are more frequently accessed by male audiences than by females.

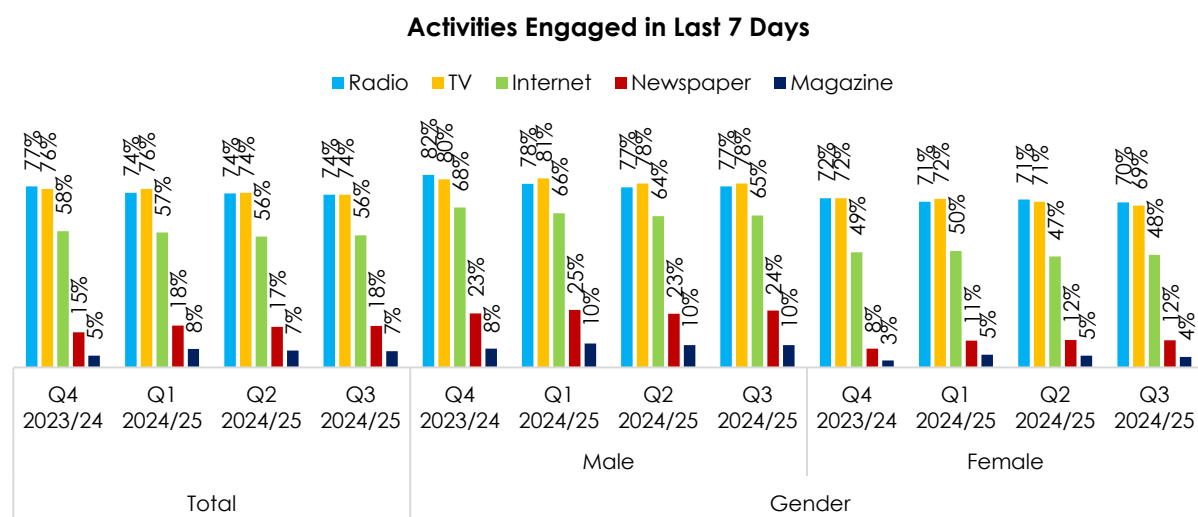


Figure 3: Activities Engaged in Last 7 Days - by total & gender

The age groups that showed the most engagement in radio were those aged 45+ years 80% in Q2 2024/25 and TV activities were those aged 18-24 years 76%.

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

		Quarter	Radio	TV	Internet	Newspaper	Magazine
Total		Q4 2023/24	77%	76%	58%	15%	5%
		Q1 2024/25	74%	76%	57%	18%	8%
		Q2 2024/25	74%	74%	56%	17%	7%
		Q3 2024/25	74%	74%	56%	18%	7%
LSM Group	LSM 1 to 4	Q4 2023/24	88%	22%	14%	1%	0%
		Q1 2024/25	91%	26%	5%	2%	1%
		Q2 2024/25	90%	26%	8%	2%	1%
		Q3 2024/25	90%	24%	8%	3%	1%
	LSM 5 to 7	Q4 2023/24	76%	77%	37%	4%	2%
		Q1 2024/25	74%	70%	28%	6%	1%
		Q2 2024/25	74%	69%	29%	7%	2%
		Q3 2024/25	74%	69%	28%	7%	2%
	LSM 8 to 11	Q4 2023/24	77%	88%	77%	23%	6%
		Q1 2024/25	72%	86%	74%	21%	9%
		Q2 2024/25	71%	86%	74%	21%	8%
		Q3 2024/25	71%	85%	75%	21%	8%
	LSM 12+	Q4 2023/24	72%	92%	95%	33%	14%
		Q1 2024/25	71%	94%	92%	39%	20%
		Q2 2024/25	70%	92%	92%	39%	20%
		Q3 2024/25	68%	92%	92%	39%	17%

In Q3 2024/25, radio remained the most widely accessed medium nationally, with particularly high listenership in Lower Eastern, Lake, Rift, Western, and South Nyanza. Television consumption was highest in Nairobi and Central, both exceeding 80%, reflecting better access to infrastructure and electricity in urban settings. North Eastern continues to lead in internet access, although it saw a slight decline from the previous quarter, remaining high at 80%. Nairobi (77%) also reported strong digital engagement. Newspaper readership showed its highest figures in Nairobi, Lake, and Rift regions, while magazine readership remained relatively low overall, with slight peaks in Lake, Rift, and Central.

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

Quarter		Radio	TV	Internet	Newspaper	Magazine
Total	Q4 2023/24	77%	76%	58%	15%	5%
	Q1 2024/25	74%	76%	57%	18%	8%
	Q2 2024/25	74%	74%	56%	17%	7%
	Q3 2024/25	74%	74%	56%	18%	7%
Central	Q4 2023/24	76%	86%	61%	19%	7%
	Q1 2024/25	75%	85%	54%	18%	8%
	Q2 2024/25	73%	83%	52%	18%	7%
	Q3 2024/25	74%	81%	55%	18%	6%
Coast	Q4 2023/24	68%	67%	64%	11%	3%

	Q1 2024/25	66%	72%	56%	18%	9%
	Q2 2024/25	67%	69%	54%	16%	8%
	Q3 2024/25	67%	67%	54%	14%	7%
Lake	Q4 2023/24	85%	82%	51%	14%	3%
	Q1 2024/25	76%	75%	58%	22%	10%
	Q2 2024/25	81%	75%	51%	20%	9%
	Q3 2024/25	81%	74%	52%	21%	9%
Lower Eastern	Q4 2023/24	80%	65%	44%	12%	6%
	Q1 2024/25	85%	70%	51%	13%	8%
	Q2 2024/25	87%	68%	50%	14%	8%
	Q3 2024/25	82%	71%	50%	16%	8%
Nairobi	Q4 2023/24	64%	84%	80%	16%	7%
	Q1 2024/25	65%	85%	79%	20%	6%
	Q2 2024/25	62%	82%	79%	19%	7%
	Q3 2024/25	62%	83%	77%	21%	6%
North Eastern	Q4 2023/24	58%	52%	74%	12%	7%
	Q1 2024/25	46%	67%	81%	14%	9%
	Q2 2024/25	43%	66%	83%	19%	13%
	Q3 2024/25	39%	66%	80%	13%	8%
North Western	Q4 2023/24	72%	73%	65%	11%	1%
	Q1 2024/25	54%	75%	57%	14%	3%
	Q2 2024/25	55%	72%	55%	13%	3%
	Q3 2024/25	57%	70%	58%	16%	6%
Rift	Q4 2023/24	84%	71%	53%	16%	4%
	Q1 2024/25	79%	80%	57%	22%	10%
	Q2 2024/25	80%	75%	53%	19%	8%
	Q3 2024/25	81%	71%	53%	20%	9%
South Nyanza	Q4 2023/24	86%	72%	54%	21%	10%
	Q1 2024/25	88%	60%	50%	14%	8%
	Q2 2024/25	82%	62%	49%	15%	6%
	Q3 2024/25	80%	64%	46%	17%	6%
Upper Eastern	Q4 2023/24	86%	83%	43%	18%	7%
	Q1 2024/25	80%	77%	55%	14%	8%
	Q2 2024/25	78%	79%	56%	13%	6%
	Q3 2024/25	78%	77%	57%	14%	6%
Western	Q4 2023/24	85%	74%	53%	15%	2%
	Q1 2024/25	83%	67%	48%	18%	5%
	Q2 2024/25	83%	67%	48%	18%	6%
	Q3 2024/25	82%	67%	48%	18%	6%

2.4. Number of Media Consumed

Based on the latest data from Q3 2024/25, the trend toward selective media consumption continues to be evident. The proportion of individuals consuming only one media platform increased again, reaching 28.0%, up from 27.0% in Q2 and 25.2% in Q1 2024/25. This steady rise suggests a growing preference for focused, single-platform engagement—perhaps influenced by time limitations or the desire for more in-depth content experiences.

Meanwhile, the share of those consuming two media platforms rose slightly to 36.9%, continuing a stable upward trend observed over the last three quarters. This indicates that moderate cross-platform engagement remains common. In contrast, multiple media consumption (three or more platforms) declined for the third consecutive quarter, falling to 34.3% from 38.0% in Q2 2024/25 and 39.6% in Q1 2024/25.

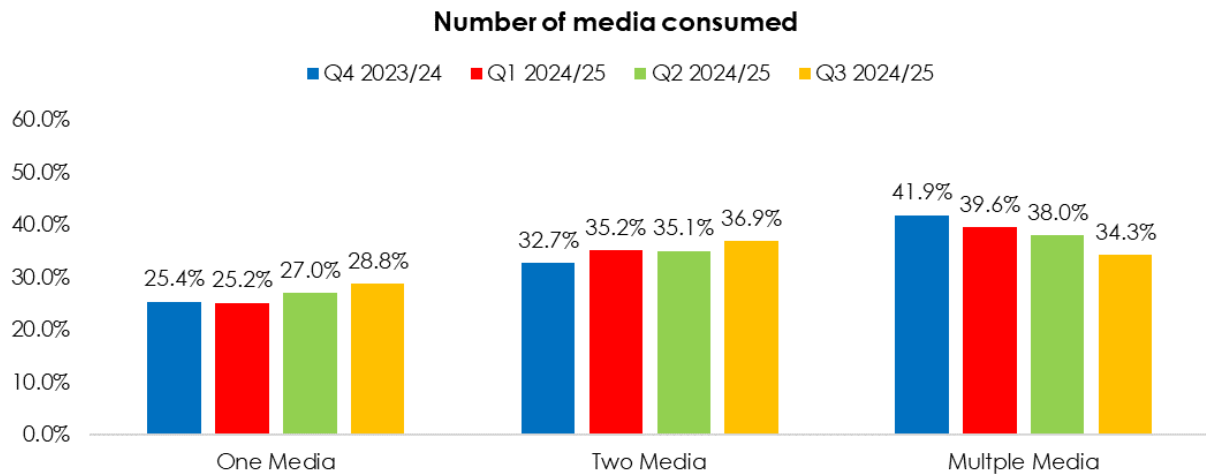


Figure 4: Number of media consumed by total

2.5. Type of Media Consumed

Across the four quarters, a clear trend in media consumption has emerged, marked by a preference for multi-platform engagement. The combination of Radio, Television, and Online platforms consistently remains the most dominant form of media use, reaching a peak in Q3 2024/25 where it accounted for 28.1% of total consumption. This reflects a growing inclination among audiences to diversify their media intake across traditional and digital formats, likely seeking broader access to news, entertainment, and information.

Table 4: Type of media Consumed by total

Type of Media Consumed	Q4 2023/24	Q1 2024/25	Q2 2024/25	Q3 2024/25
Radio+TV+Online	26.00%	21.20%	20.70%	28.10%
Radio+TV	17.00%	17.70%	17.50%	18.90%
Radio Only	14.00%	14.20%	15.40%	16.00%
TV+Online	10.00%	12.20%	11.70%	12.90%
TV Only	7.00%	6.80%	7.30%	7.60%
Online Only	4.00%	4.10%	4.20%	5.00%
All Media	12.00%	13.70%	12.40%	4.70%

Radio+Online	5.00%	3.50%	4.00%	4.60%
Radio+TV+Print	3.00%	2.80%	3.10%	0.90%
TV+Print+Online	1.00%	1.40%	1.40%	0.50%
Print+Online	0.00%	0.80%	0.90%	0.30%
Radio+Print	0.00%	0.60%	0.60%	0.20%
Radio+Print+Online	0.00%	0.60%	0.50%	0.20%
TV+Print	0.00%	0.40%	0.40%	0.10%
Print Only	0.00%	0.10%	0.10%	0.00%

2.6. Frequency of Media Consumption

Between Q2 and Q3 2024/25, daily media consumption remained the same across several platforms.

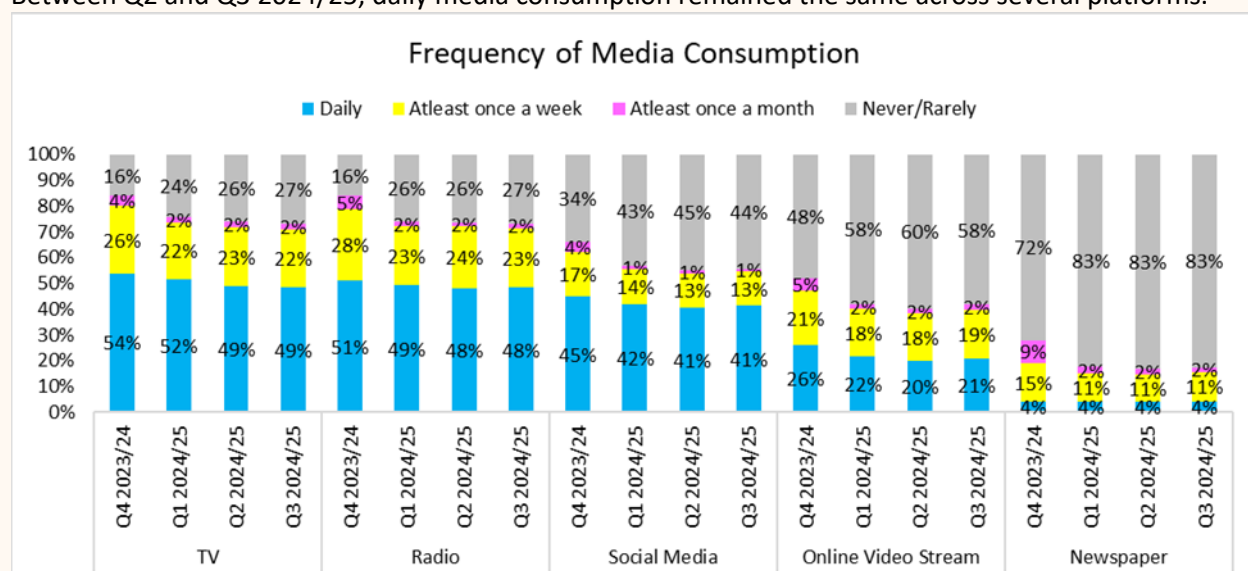


Figure 5: Frequency of consuming Tv, radio, social media, online streams and newspapers

2.7. Demographics of Media Consumers Profiles

Gender distribution is relatively balanced across platforms, though male users slightly outnumber females, particularly in online and print media. Youth (15–34 years) form the core of online and radio audiences, whereas TV and print tend to attract a broader age range, including more mature audiences. Geographically, rural residents dominate radio listenership, owing to the medium’s accessibility, while urban users make up a larger proportion of online and print media consumers.

In terms of socioeconomic status (LSM), radio consumption is skewed toward lower LSM groups, while TV and online platforms are more popular among middle to higher LSMs. Print readership is highest among upper LSMs, reflecting both affordability and access to printed materials.

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

Demographics		Financial Year	Radio Listeners, n=24.1M	TV Viewers, n=24.1M	Newspaper Readership, n=5.8M	Online Usage, n=18.4M
Gender	Male	Q4 2023/24	52%	52%	74%	58%
		Q1 2024/25	52%	52%	68%	56%

		Q2 2024/25	51%	52%	66%	57%
		Q3 2024/25	52%	52%	67%	57%
	Female	Q4 2023/24	48%	48%	26%	42%
		Q1 2024/25	48%	48%	33%	44%
		Q2 2024/25	49%	48%	35%	43%
		Q3 2024/25	48%	48%	33%	43%
Age group	15-17 years	Q4 2023/24	12%	10%	12%	13%
		Q1 2024/25	11%	11%	12%	14%
		Q2 2024/25	11%	11%	12%	15%
		Q3 2024/25	11%	11%	10%	14%
	18-24 years	Q4 2023/24	20%	23%	21%	29%
		Q1 2024/25	20%	24%	19%	27%
		Q2 2024/25	20%	23%	21%	27%
		Q3 2024/25	20%	22%	22%	27%
	25-34 years	Q4 2023/24	24%	25%	26%	28%
		Q1 2024/25	23%	26%	30%	31%
		Q2 2024/25	23%	25%	29%	31%
		Q3 2024/25	23%	26%	28%	30%
	35-44 years	Q4 2023/24	17%	18%	16%	15%
		Q1 2024/25	19%	17%	19%	16%
		Q2 2024/25	19%	18%	19%	16%
		Q3 2024/25	19%	18%	18%	16%
	45+ years	Q4 2023/24	27%	24%	24%	14%
		Q1 2024/25	28%	23%	20%	12%
		Q2 2024/25	28%	23%	20%	12%
		Q3 2024/25	27%	23%	21%	13%
Setting	Urban	Q4 2023/24	28%	34%	37%	44%
		Q1 2024/25	28%	35%	40%	41%
		Q2 2024/25	28%	35%	42%	43%
		Q3 2024/25	28%	36%	41%	43%
	Rural	Q4 2023/24	72%	66%	63%	56%
		Q1 2024/25	72%	65%	60%	59%
		Q2 2024/25	72%	65%	58%	57%
		Q3 2024/25	72%	64%	59%	57%
LSM Group	LSM 1 to 4	Q4 2023/24	15%	4%	1%	3%
		Q1 2024/25	15%	4%	2%	1%
		Q2 2024/25	17%	5%	2%	2%
		Q3 2024/25	17%	4%	2%	2%

	LSM 5 to 7	Q4 2023/24	31%	32%	9%	20%
		Q1 2024/25	25%	23%	8%	12%
		Q2 2024/25	26%	25%	10%	14%
		Q3 2024/25	27%	25%	10%	13%
	LSM 8 to 11	Q4 2023/24	40%	46%	59%	52%
		Q1 2024/25	45%	53%	54%	60%
		Q2 2024/25	43%	52%	53%	59%
		Q3 2024/25	42%	51%	53%	59%
	LSM 12+	Q4 2023/24	14%	18%	31%	24%
		Q1 2024/25	16%	21%	37%	27%
		Q2 2024/25	15%	19%	35%	26%
		Q3 2024/25	14%	20%	35%	26%

3. Radio Listenership Section

3.1. Radio Listeners' Key Demographics

Among demographic groups, male audiences consistently exhibit higher radio listenership compared to females across all four quarters, with the gap most evident in Q3 2024/25 where male listenership stands at 77%, versus 70% for females. Additionally, radio listenership increases steadily with age.

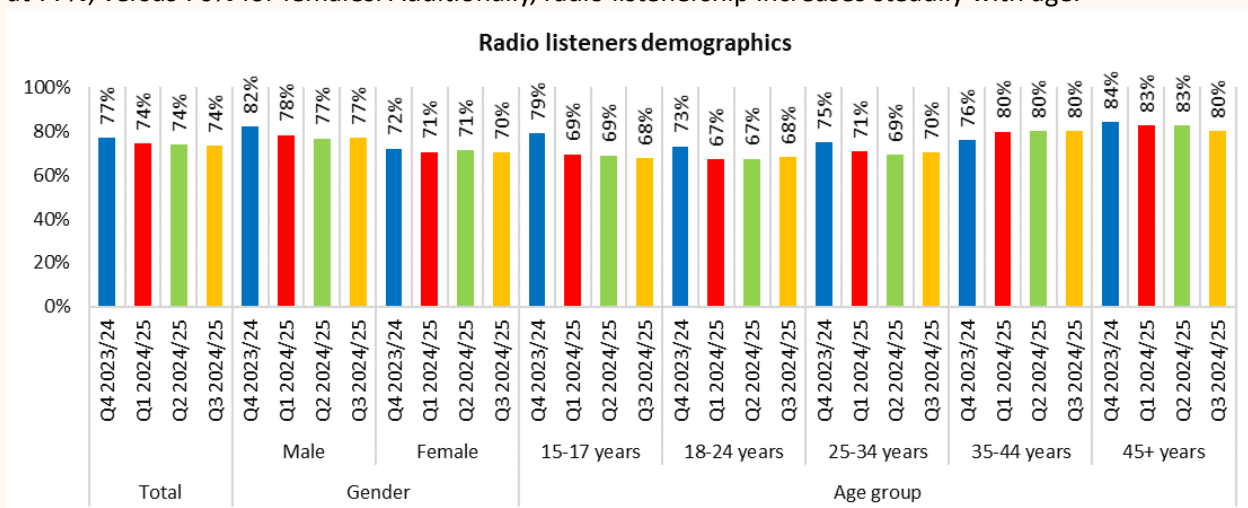


Figure 6: Demographics of radio consumers– by total, gender & age group

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.

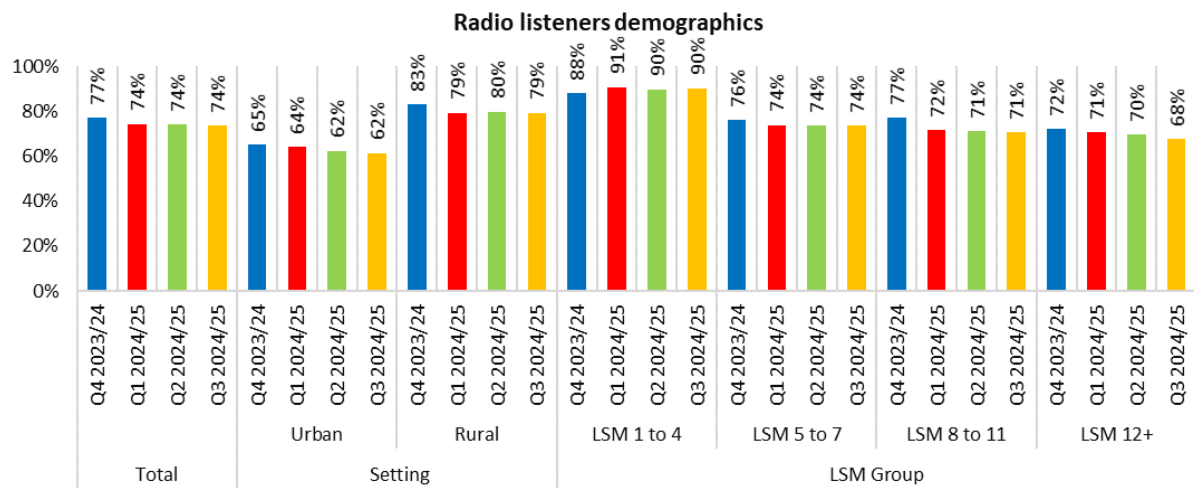


Figure 7: Demographics of radio consumers– by total, setting and LSM

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

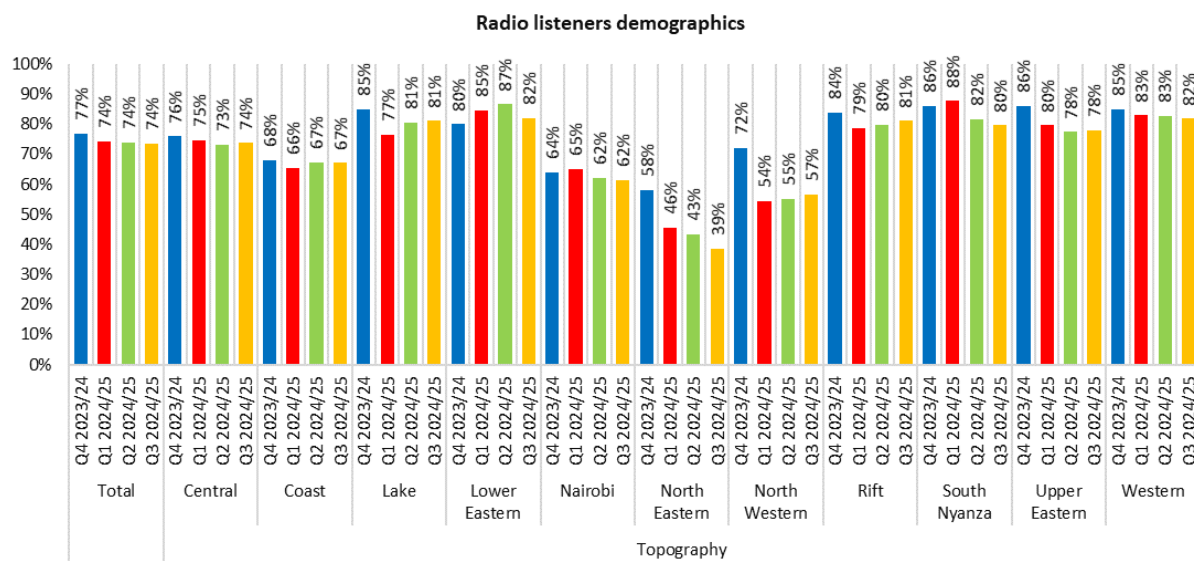


Figure 8: Demographics of radio consumers– by total, Topography

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.

Language of radio listenership by key demographics

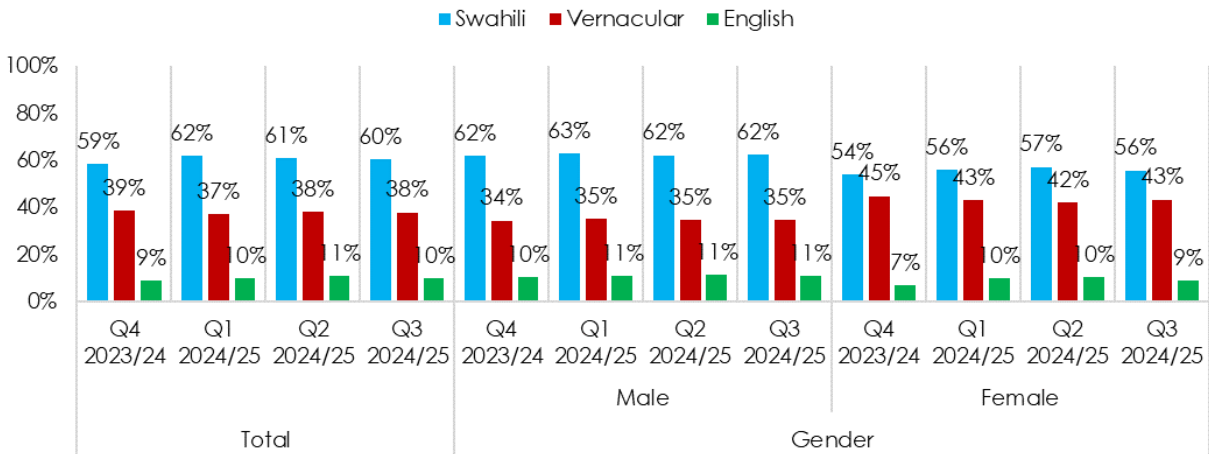


Figure 9: Radio listenership language by total and gender

Swahili-language radio stations remain the most widely tuned-in across both urban and rural settings. Urban audiences consistently show higher engagement with English radio compared to their rural counterparts, particularly during the period from Q4 2023/24 to Q3 2024/25.

Language of radio listenership by key demographics

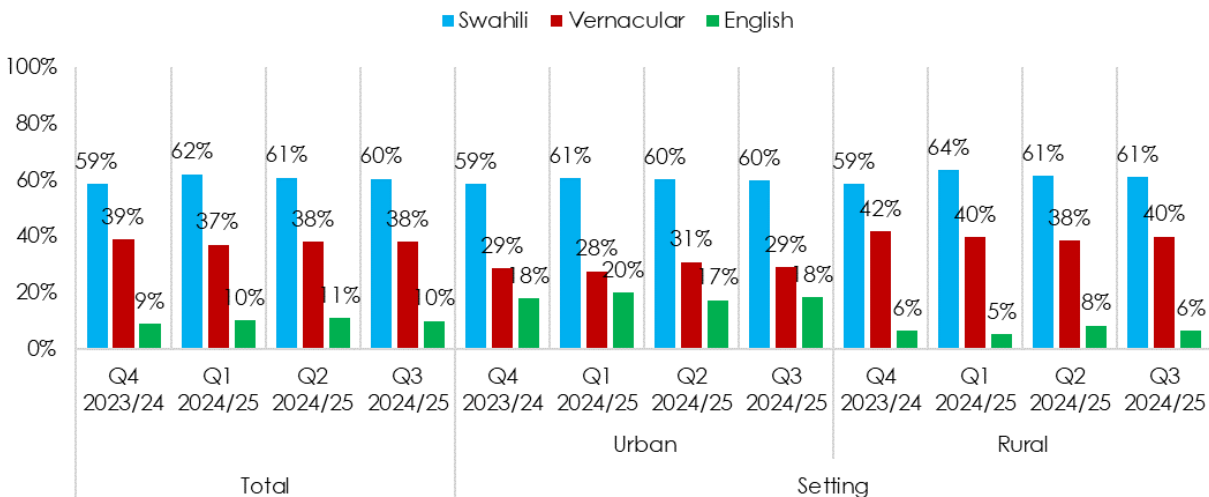


Figure 10: Radio listenership language by total & setting

Kiswahili and vernacular languages dominate radio listenership among populations in the lower to middle LSM brackets (LSM 5 to 11). These groups consistently report the highest listenership for stations broadcasting in Swahili (averaging 61–63%) and vernacular languages (around 35–42%). In contrast, higher LSM groups (LSM 12+) show a more balanced consumption pattern, with a noticeable rise in English listenership at 18% in Q3 2024/25, and a relative drop in vernacular usage.

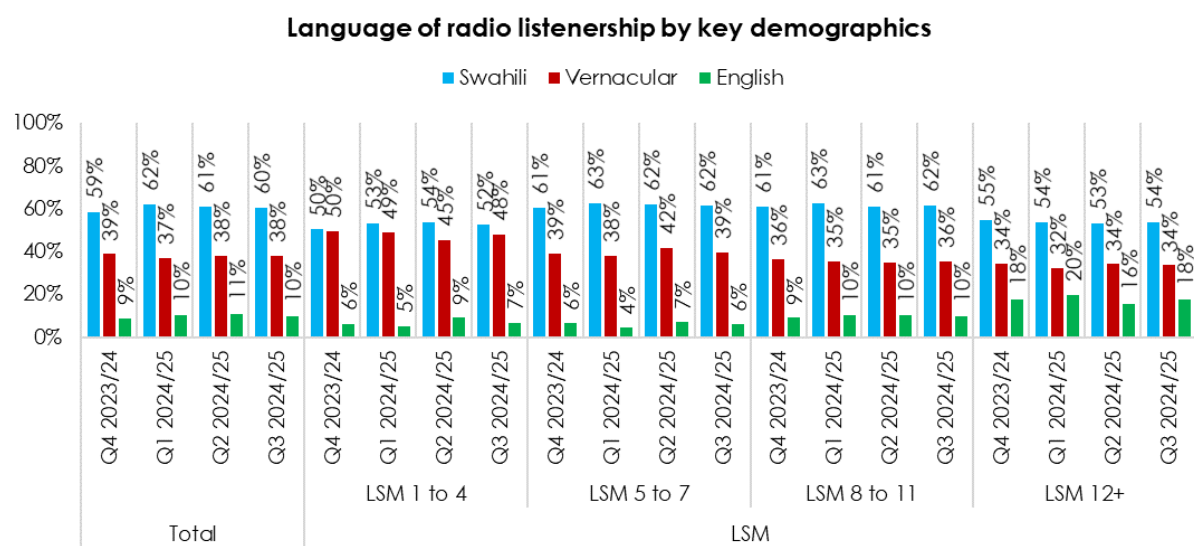


Figure 11: Radio listenership language by total & LSM

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

Table 6: Radio listenership language by total and topography

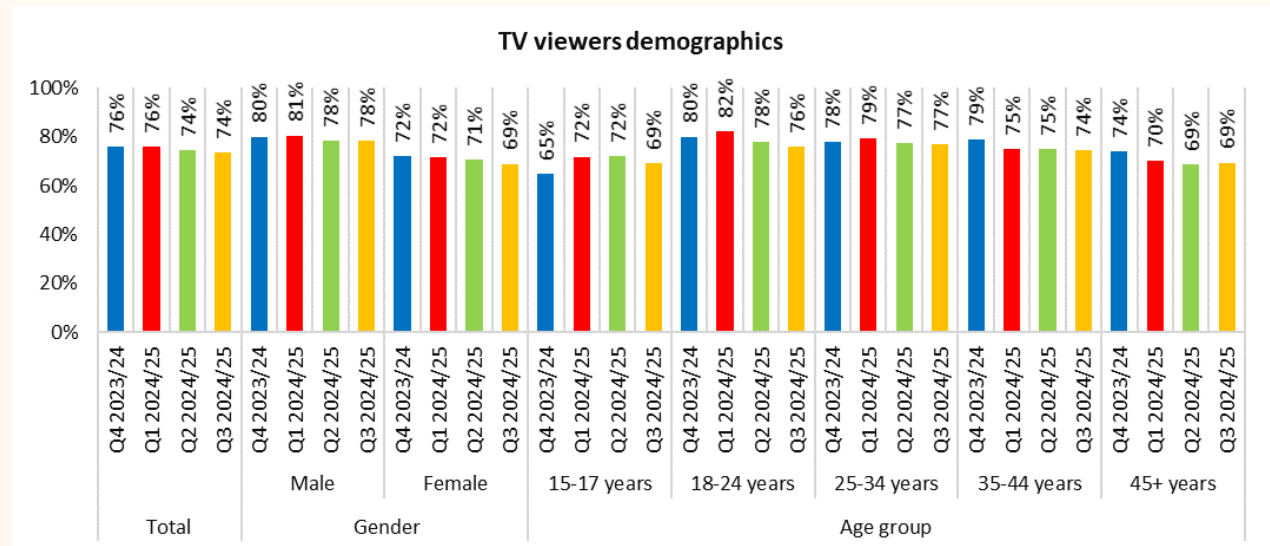
Total/ Topography		Financial Year	Radio listenership language		
			Swahili	Vernacular	English
Total		Q4 2023/24	59%	39%	9%
		Q1 2024/25	59%	39%	9%
		Q2 2024/25	61%	38%	11%
		Q3 2024/25	60%	39%	10%
Topography	Central	Q4 2023/24	42%	54%	10%
		Q1 2024/25	43%	52%	11%
		Q2 2024/25	46%	51%	11%
		Q3 2024/25	44%	52%	10%
	Coast	Q4 2023/24	59%	32%	14%
		Q1 2024/25	61%	31%	15%
		Q2 2024/25	62%	32%	15%
		Q3 2024/25	61%	32%	15%
	Lake	Q4 2023/24	46%	60%	4%
		Q1 2024/25	47%	58%	4%
		Q2 2024/25	49%	55%	5%
		Q3 2024/25	47%	58%	4%
	Lower Eastern	Q4 2023/24	33%	66%	6%
		Q1 2024/25	34%	64%	6%
		Q2 2024/25	40%	60%	9%

		Q3 2024/25	36%	63%	7%
	Nairobi	Q4 2023/24	66%	15%	24%
		Q1 2024/25	68%	15%	25%
		Q2 2024/25	67%	19%	21%
		Q3 2024/25	67%	16%	23%
	North Eastern	Q4 2023/24	51%	27%	27%
		Q1 2024/25	53%	26%	28%
		Q2 2024/25	54%	27%	23%
		Q3 2024/25	53%	27%	26%
	North Western	Q4 2023/24	66%	33%	10%
		Q1 2024/25	68%	32%	11%
		Q2 2024/25	67%	30%	13%
		Q3 2024/25	67%	32%	11%
	Rift	Q4 2023/24	68%	29%	8%
		Q1 2024/25	70%	28%	8%
		Q2 2024/25	68%	29%	9%
		Q3 2024/25	69%	29%	9%
	South Nyanza	Q4 2023/24	79%	23%	5%
		Q1 2024/25	81%	22%	5%
		Q2 2024/25	75%	27%	8%
		Q3 2024/25	78%	24%	6%
	Upper Eastern	Q4 2023/24	46%	51%	9%
		Q1 2024/25	47%	49%	9%
		Q2 2024/25	49%	46%	9%
		Q3 2024/25	47%	49%	9%
	Western	Q4 2023/24	88%	15%	2%
		Q1 2024/25	91%	15%	2%
		Q2 2024/25	85%	17%	5%
		Q3 2024/25	88%	16%	3%

4. TV Viewership Section

4.1. TV Viewer's Key Demographics

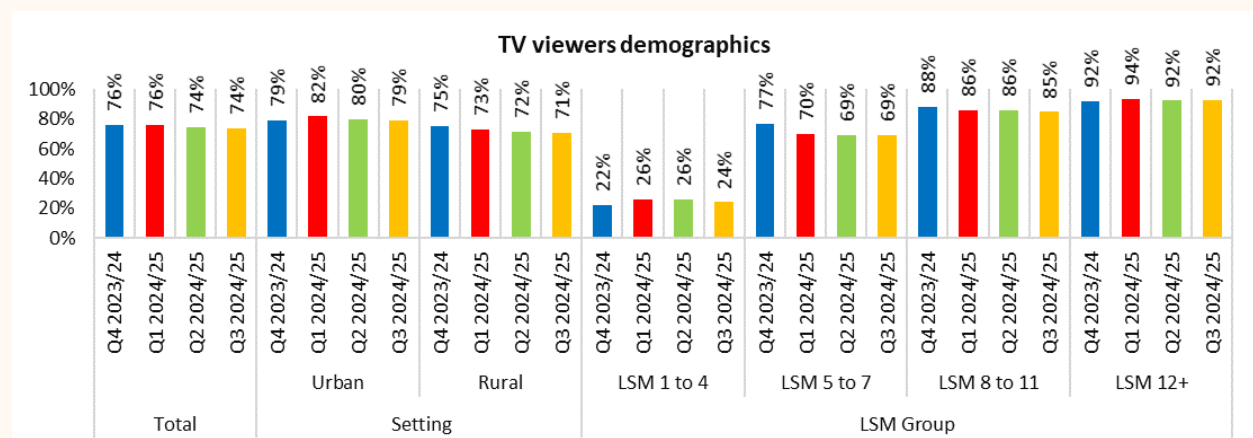
The data reveals gender gaps in TV watching, as males demonstrate greater interest across the four quarters. There is a decrease in viewership among 35 to 45+ year-olds, indicates TV networks and streaming services are producing less content targeted specifically at older people, ignoring their interests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



N=32.23M: All Respondents

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

Viewership decreased 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 Upper Eastern and 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.

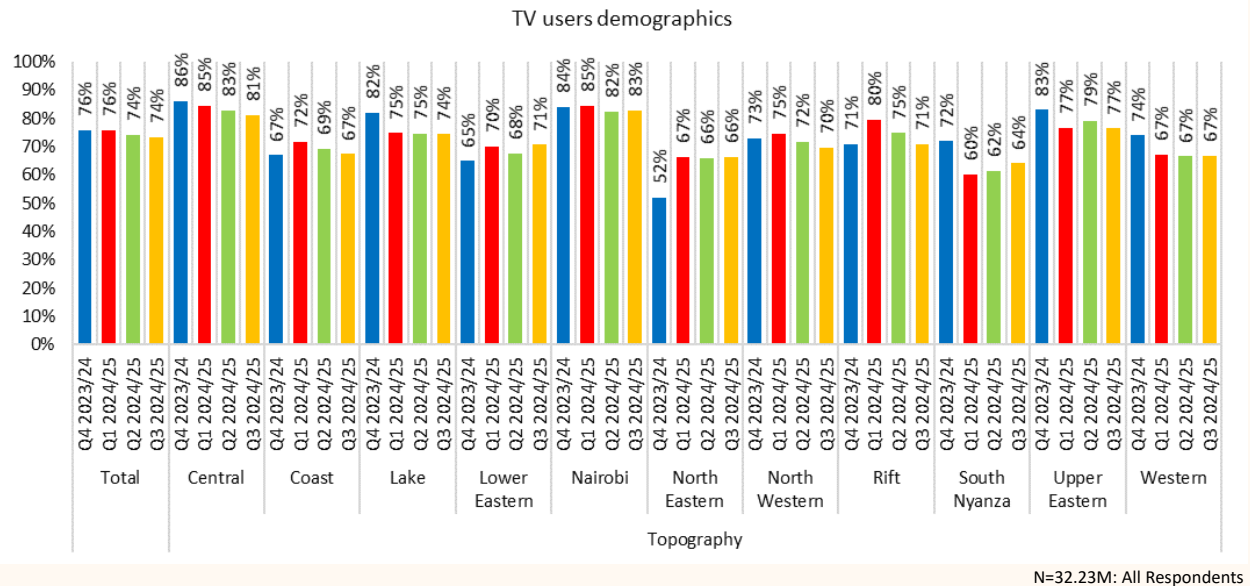
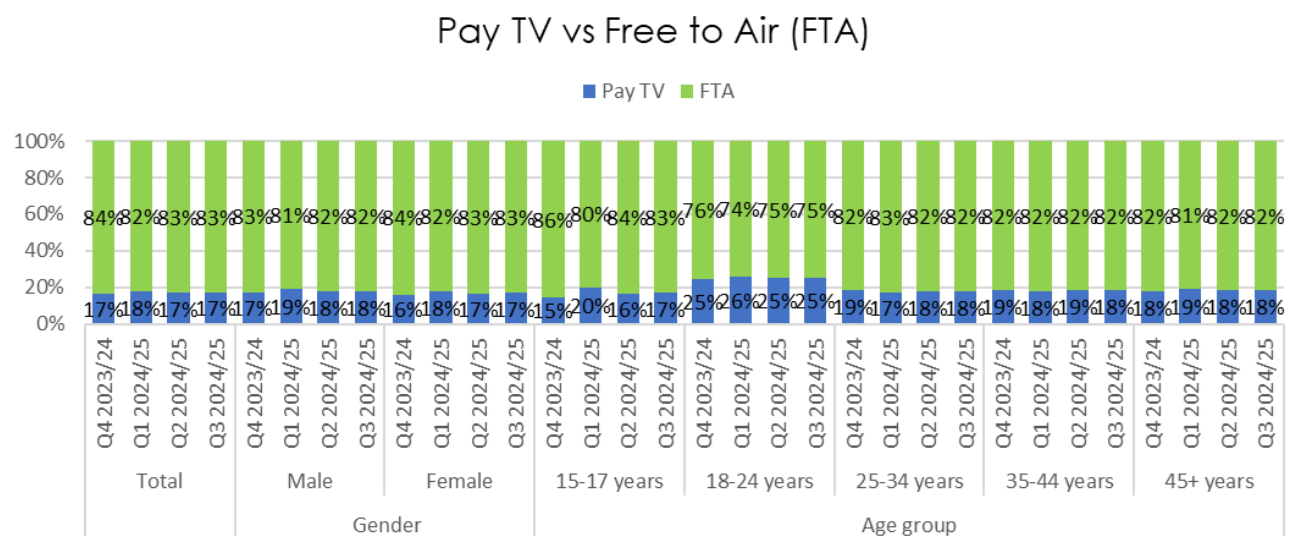


Figure 14: TV Viewership demographics – by total and topography

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

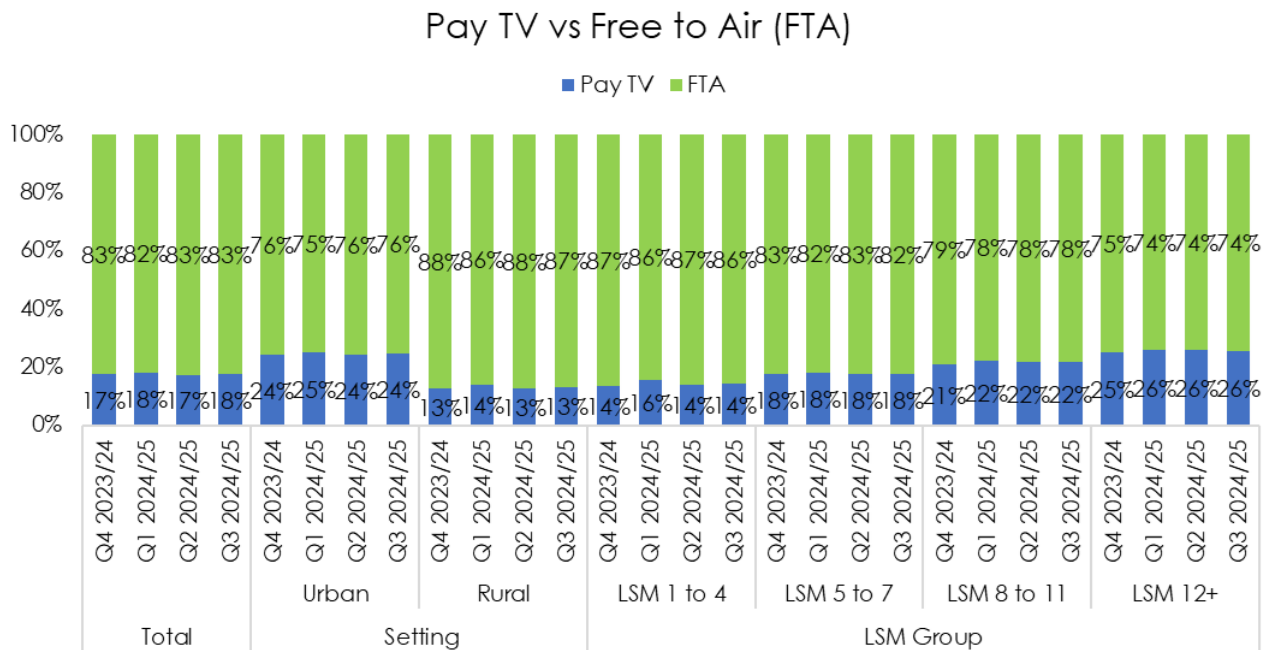
In Kenya, Free to Air (FTA) TV enjoys a notably broader viewership compared to pay TV. For both Pay TV and FTA TV, reach does not vary by gender. However, the reach of pay TV is slightly higher among individuals aged 18 to 24 years, with it being higher for this age group than the older folk.



n=24.3M: Average Daily TV Viewers

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+.



n=24.3M: Average Daily TV Viewers

Figure 16: Pay TV vs Free to Air TV Reach - total and LSM

4.3. Exposure to impact of advertising

The analysis of advertising exposure reveals that the optimal window for maximum advertising impact is between 19:00 and 22:00. During this period, both audience size and the number of ad spots reach their highest levels, indicating a strong alignment between reach and advertiser activity. Notably, audience size begins to climb significantly after 18:00, suggesting that evening hours are crucial for capturing a large and engaged audience.

In contrast, the post-22:00 period sees a steep decline in both audience size and ad placements, highlighting a reduced return on investment for late-night advertising. Additionally, despite a steady volume of ad spots in the early morning hours (00:00–06:00), the audience remains minimal, suggesting limited value in those time blocks.

A moderate rise in audience size from noon to 18:00, along with a gradual increase in ad placements, presents secondary opportunities for advertisers, particularly for campaigns targeting midday and afternoon listeners. Overall, strategic placement of ads in the early evening period maximizes visibility and potential engagement.

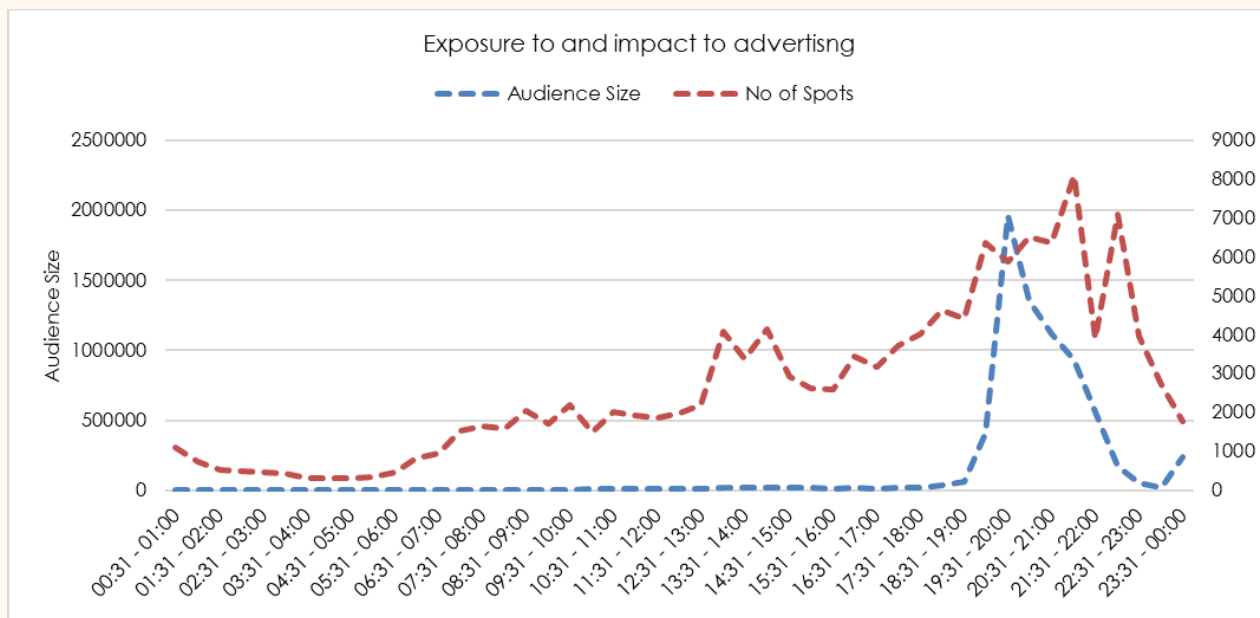


Figure 17: TV exposure to and impact to advertising

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 under 34 years.

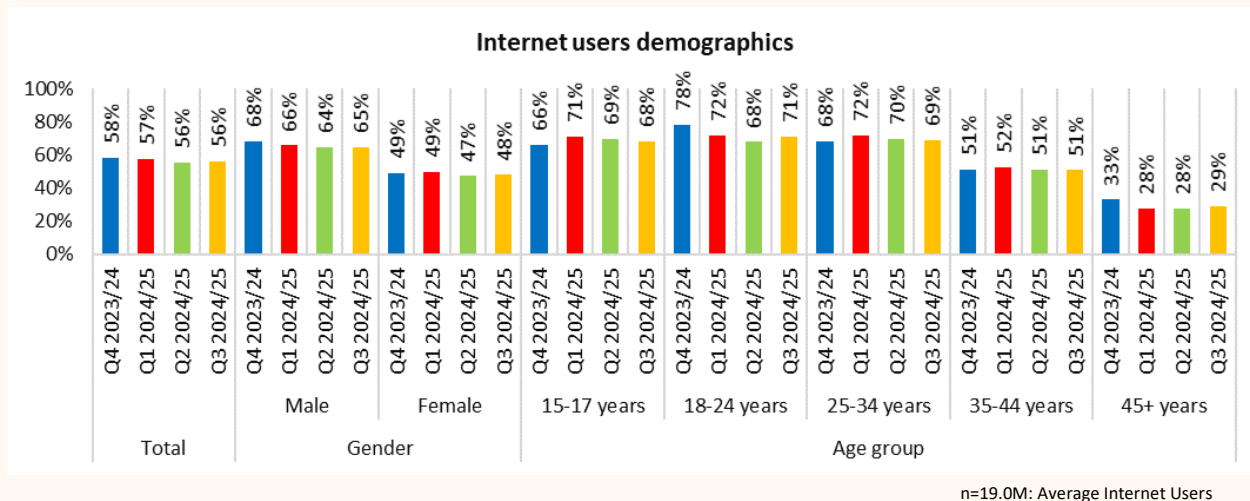


Figure 18: Internet users' demographics – total, gender and age group

The increased prevalence of internet access in Kenyan urban areas is largely driven by the presence of well-established digital infrastructure, including extensive broadband networks and reliable cellular coverage. Urban populations also benefit from greater socioeconomic resources, which enable broader ownership of digital devices and faster adoption of emerging technologies. This contrast with rural areas highlights the digital divide shaped by infrastructural and economic disparities. Furthermore, higher Living Standards Measure (LSM) scores are consistently correlated with elevated levels of internet usage, reinforcing the connection between income, education, and digital engagement in Kenya's evolving media landscape.

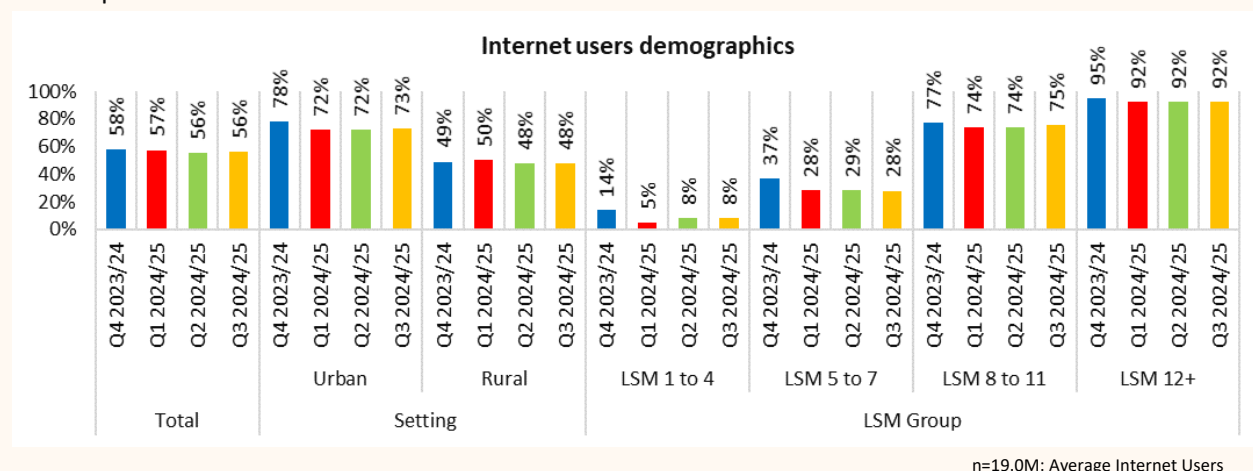


Figure 19: Internet users' demographics – total, setting and LSM

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

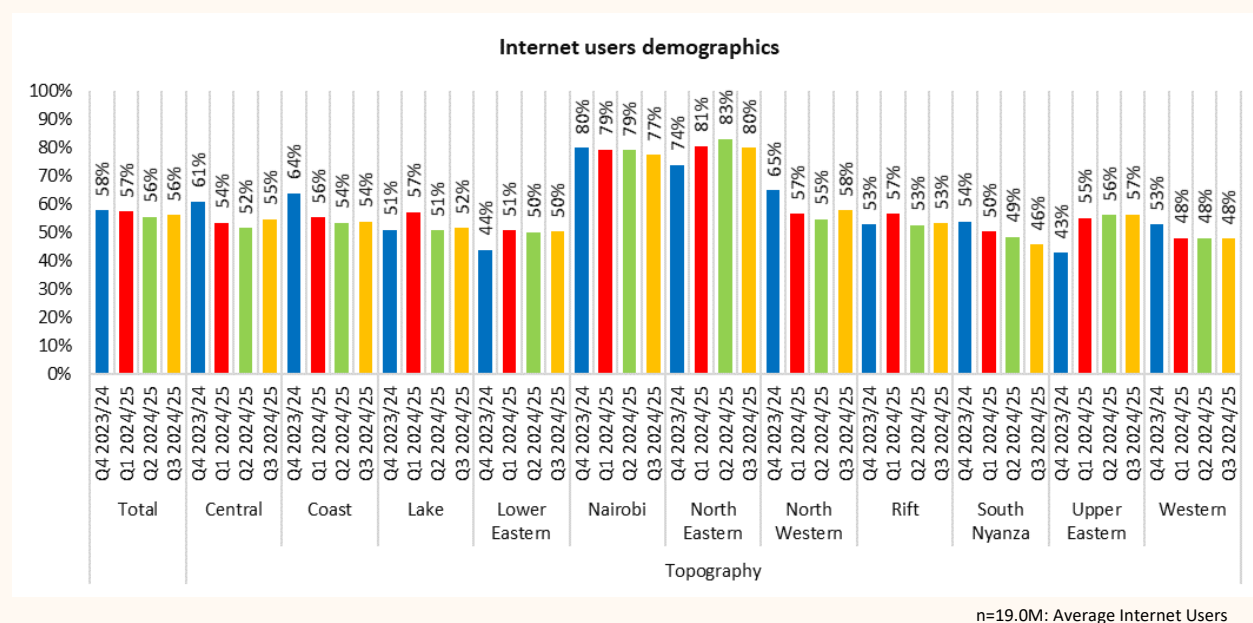


Figure 20: Internet users' demographics – total and topography

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.

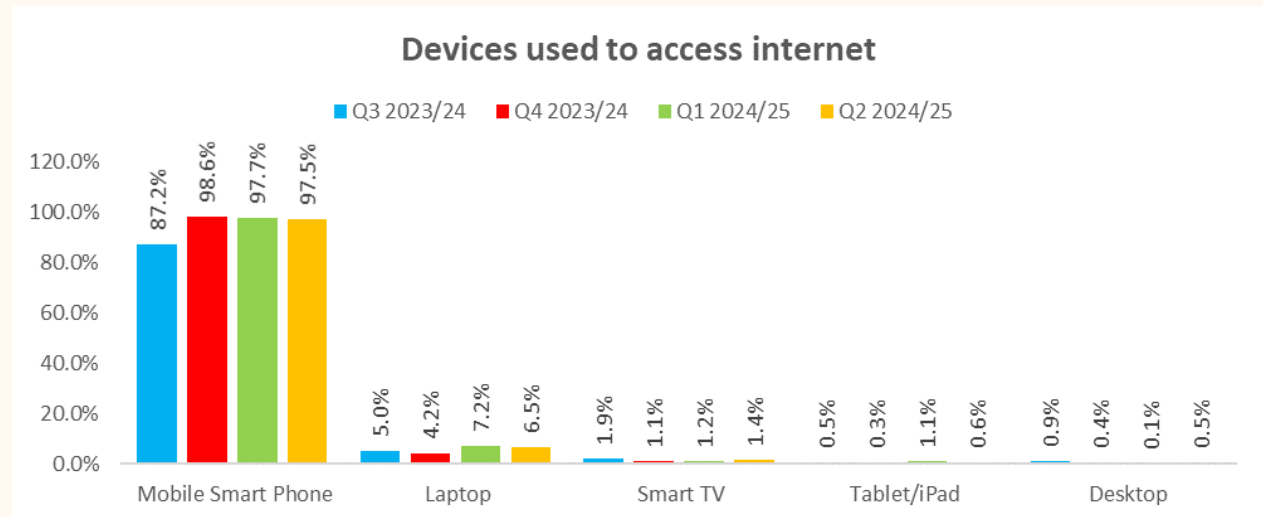


Figure 21: Devices used to access the internet

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.

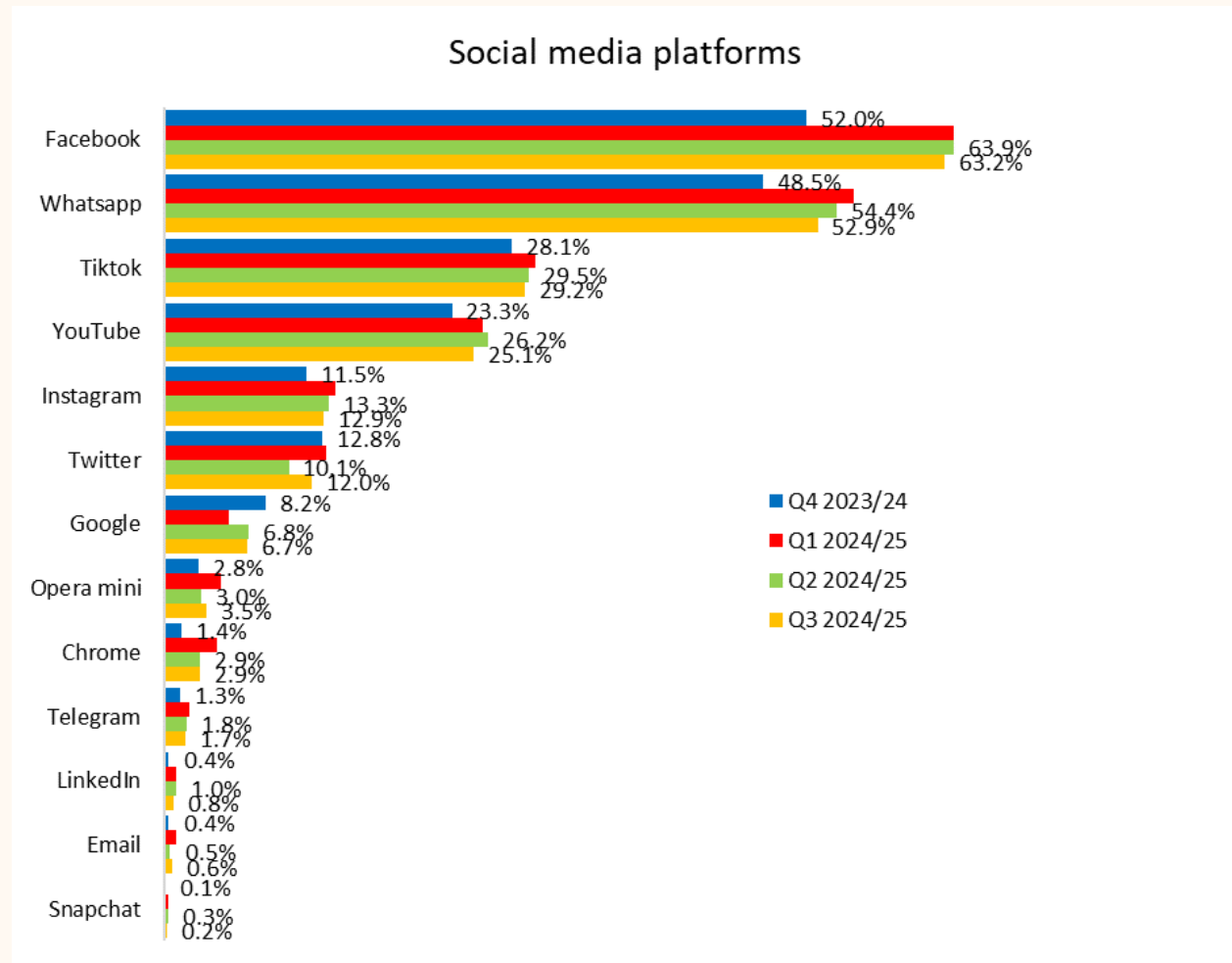
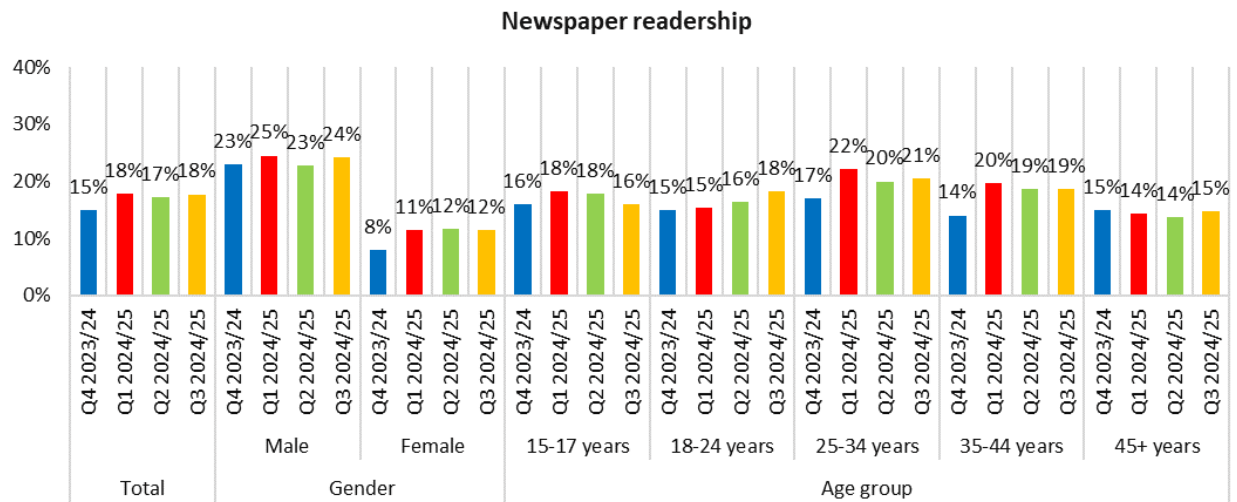


Figure 25: Popular social media platforms

6. Newspaper Readership

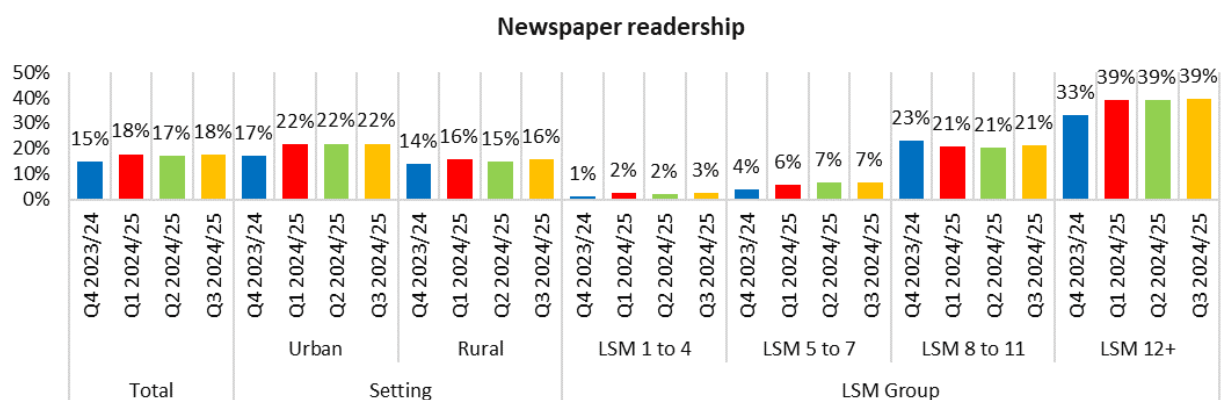
There are more males who read newspapers as compared to females. In terms of age, 25-34 years tend to read newspapers more than other age groups.



n=32.2M: All Respondents

Figure 22: 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 23: Newspaper readership demographics – by total, setting and LSM

In Q3 2024/25, higher newspaper readership incidences are reported in the Lake and Nairobi topographies. There has been a slight decrease in readership in the Rift topographies from 22% to 19%.

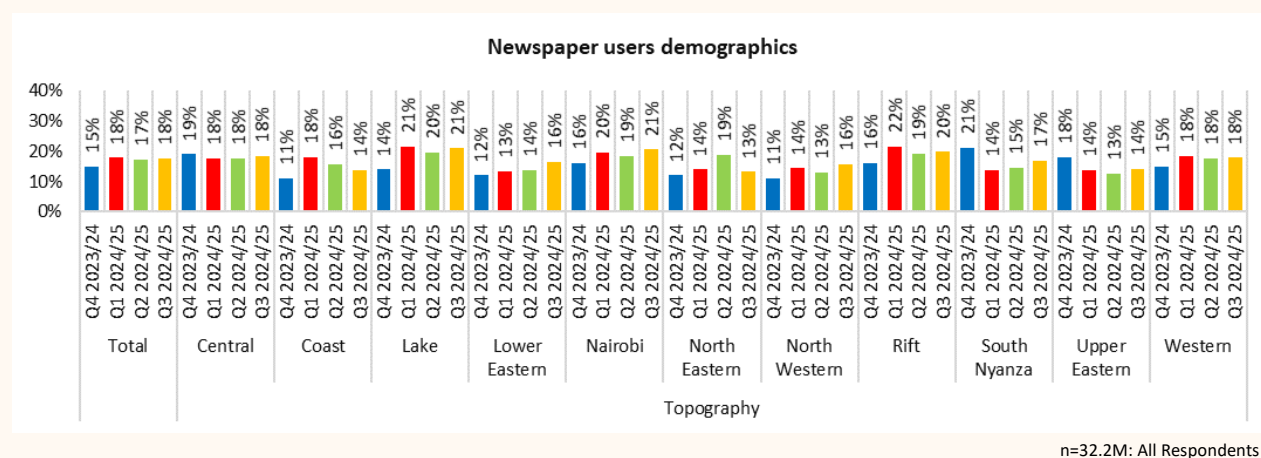


Figure 24: Newspaper readership demographics – by total and topography

7. Advertising Expenditure

7.1. Advertising Expenditure Overview

Overall industry spending dropped by -19% in Q3 2024/25. The industry's total spending decreased from 20 billion to Kes 16B between Q2 2024/25 and Q3 2024/25.

Table 7: Advertising Expenditure

Sectors	Q4 2023/24	Q1 2024/25	Q2 2024/25	Q3 2024/25	CHANGE (Q1-Q4)
Media	2,371	3,544	3,031	2,479	-18%
Betting & Gaming	1,063	2,507	1,738	2,191	26%
Financial Services	2,876	2,262	2,136	2,069	-3%
Corporate & Multi-brand	1,873	1,753	1,670	1,304	-22%
Tourism & Entertainment	421	461	953	1,276	34%
Communications	1,749	1,134	1,343	1,169	-13%
Retail	235	533	2,232	1,119	-50%
Property & Building & Acc.	1,335	1,126	864	850	-2%
Personal Care	1,479	1,572	1,160	793	-32%
Foods	855	810	1,663	789	-53%
Publishing & Education	473	505	496	718	45%
Beverage	1,309	594	822	382	-54%
Veterinary & Agriculture	593	336	697	355	-49%
Pharmaceuticals	443	395	537	339	-37%
Household	797	524	486	322	-34%
Transport	426	252	360	176	-51%
Clothing, Fabrics & Footwear	23	42	89	45	-50%
Office Equipment & Supplies	338	16	27	20	-27%
Total	18,659	18,368	20,303	16,396	-19%

Key: Figures in KES Millions (000,000)

TV has the greatest spending, with radio coming in second. Media have the highest spending in TV while Financial Services on radio. Betting & Gaming have the highest spending in print.

Table 8: Advertising Expenditure for radio, TV & print

Sectors	TV	Radio	Print	Total	Share of Spending (SOS)
Media	1,552	564	363	2,479	15.1%
Retail	1,302	887	1	2,191	13.4%
Financial Services	864	1,014	192	2,069	12.6%
Betting & Gaming	496	284	524	1,304	8.0%
Corporate & Multibrand	936	190	151	1,276	7.8%
Foods	820	348	1	1,169	7.1%
Communications	609	490	20	1,119	6.8%
Personal Care	702	122	26	850	5.2%

Tourism & Entertainment	718	73	1	793	4.8%
Property & Building & Acc.	580	208	1	789	4.8%
Beverage	490	177	51	718	4.4%
Veterinary & Agriculture	155	222	4	382	2.3%
Pharmaceuticals	48	303	5	355	2.2%
Publishing & Education	289	43	7	339	2.1%
Household	224	92	6	322	2.0%
Transport	74	75	27	176	1.1%
Clothing, Fabrics & Footwear	20	23	1	45	0.3%
Office Equipment & Supplies	4	8	7	20	0.1%
Grand Total	9,883	5,123	1,390	16,396	100.0%

Key: Figures in KES Millions (000,000)

7.2. Year to Date Advertising Trends

While electronic media showed positive trends, media purchasing witnessed an -25 drop by the beginning of January 2025 then a positive growth trend to 7% by end of March 2025.

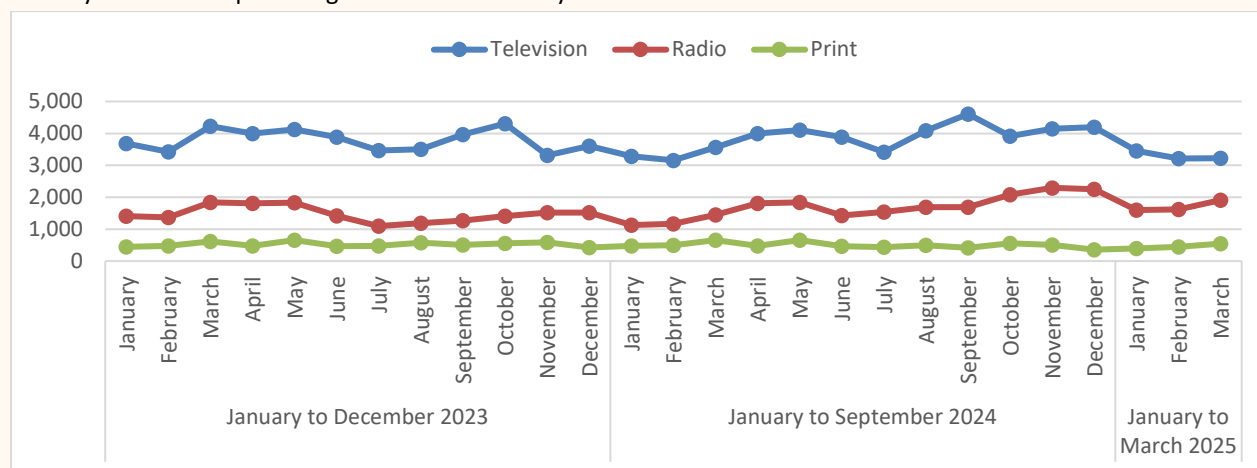


Figure 25: Advertising spends Jan 2023 to March 2025

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.

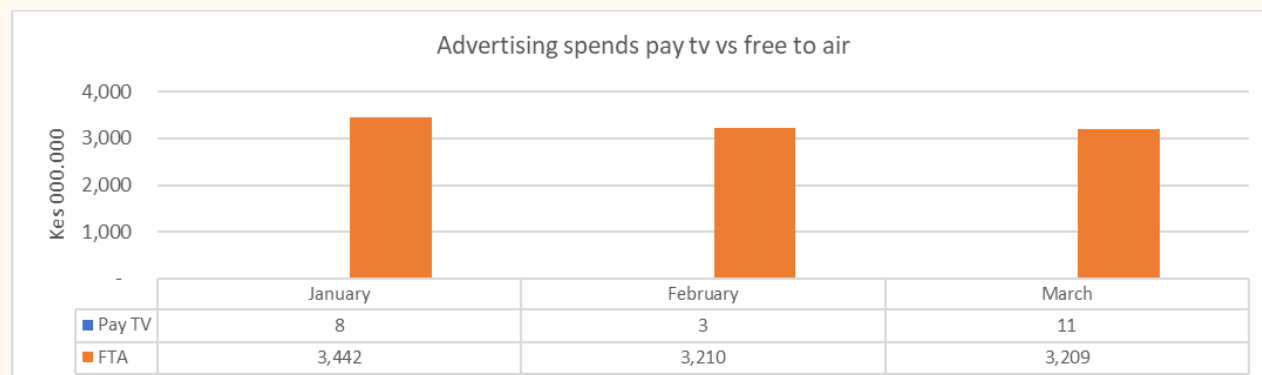


Figure 26: Advertising spends pay TV and free to air TV
Key: Figures in KES Millions (000,000)

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	Q4 2023/24	Q1 2024/25	Q2 2024/25	Q3 2024/25
Media	1619	2330	1687	1552
Betting & Gaming	794	1871	1150	1302
Tourism & Entertainment	208	378	685	936
Financial Services	1541	1156	992	864
Communications	1145	823	770	820
Personal Care	1277	1435	1045	718
Property & Building & Acc.	1043	1022	704	702
Retail	164	383	1443	609
Foods	709	539	1220	580
Corporate & Multibrand	831	798	727	496
Publishing & Education	316	300	336	490
Pharmaceuticals	331	287	414	289
Household	566	304	284	224
Beverage	857	283	375	155
Transport	207	79	109	74
Veterinary & Agriculture	80	63	237	48
Clothing, Fabrics & Footwear	19	37	60	20
Office Equipment & Supplies	273	12	24	4

Key: Figures in KES Millions (000,000)

7.5. Radio Spends by Sector/Industry

Financial Services has the highest advertising spend on radio followed by Betting & Gaming in Q3 2024/25.

Table 10: Radio spends by sector/industry

Sector	Q4 2023/24	Q1 2024/25	Q2 2024/25	Q3 2024/25
Financial Services	1114	950	378	1014
Betting & Gaming	229	629	259	887
Media	322	760	375	564
Retail	54	136	598	490
Communications	585	304	298	348
Veterinary & Agriculture	506	271	213	303

Corporate & Multibrand	356	405	89	284
Beverage	442	310	243	222
Foods	144	269	139	208
Tourism & Entertainment	206	68	71	190
Publishing & Education	101	158	13	177
Property & Building & Acc.	243	72	54	122
Household	221	210	71	92
Transport	180	139	44	75
Personal Care	201	137	100	73
Pharmaceuticals	105	94	43	43
Clothing, Fabrics & Footwear	2	4	7	23
Office Equipment's & Supplies	64	2	1	8

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 Q3 2024/25 though a decrease compared to Q2 2024/25.

Table 11: Print spends by sector/industry

SECTOR	Q4 2023/24	Q1 2024/25	Q2 2024/25	Q3 2024/25
Corporate & Multibrand	757	686	604	524
Media	492	430	399	363
Financial Services	153	221	169	192
Tourism & Entertainment	18	7	48	151
Publishing & Education	79	56	51	51
Transport	20	40	48	27
Property & Building & Acc.	26	48	37	26
Retail	7	17	25	20
Pharmaceuticals	6	7	8	7
Office Equipment & Supplies	1	1	0	7
Household	10	10	10	6
Veterinary & Agriculture	1	7	2	5
Beverage	1	10	6	4
Clothing, Fabrics & Footwear	4	3	5	1
Communications	6	19	7	1
Foods	2	2	1	1
Betting & Gaming	45	40	4	1

Key: Figures in KES Millions (000,000)

8. CHALLENGES AND OPPORTUNITIES FOR THE BROADCASTING INDUSTRY IN KENYA

Challenges in the Broadcasting Industry in Kenya

❖ Intensifying Competition in a Crowded Market

- Kenya's broadcasting space is saturated, with more than 150 radio stations and numerous TV channels competing for audience share and advertising spend. Major broadcasters such as Citizen TV continue to dominate, leaving smaller and regional players struggling for visibility and revenue.

❖ Changing Consumer Preferences and Fragmented Attention

- A growing segment of Kenyans—particularly those aged 18–34—is shifting toward digital platforms such as YouTube, TikTok, and WhatsApp for entertainment, news, and information. Multi-platform consumption is on the rise, yet a notable 28% of media users are sticking to single-platform engagement, indicating increasingly selective behavior.

❖ Uneven Access and Socioeconomic Divide

- Media consumption habits differ significantly by LSM and geography. Lower LSMs rely heavily on radio, while higher LSMs consume more TV and online content. This uneven distribution makes it difficult for broadcasters to create one-size-fits-all content.
- Infrastructural limitations in rural and low-income areas hinder growth in TV and digital media reach.

❖ Disparities in Advertising Revenue Allocation

- The advertising landscape heavily favors leading stations such as Citizen TV and Radio Citizen, with the majority of ad spending funneled into a few dominant outlets.
- Smaller or vernacular stations face financial sustainability challenges due to limited ad budgets despite having niche, loyal audiences.

Opportunities in the Broadcasting Industry in Kenya

❖ Expanding Digital Penetration and Multi-Platform Access

- Over 59% of Kenyans now use the internet regularly, with smartphones being the dominant device for digital media access. Online streaming, podcasts, and social media engagement offer alternative revenue streams and broader reach, especially among urban youth and LSM 12+ segments.

❖ Growth in Vernacular and Localized Content

- Stations like Ramogi TV and Inooro FM are proving that regional language programming can attract large, loyal followings.
- Localization improves relatability and trust, particularly in rural and culturally distinct regions.

❖ Mobile Accessibility

- The dominance of mobile devices opens doors for mobile-first formats such as short videos, live polls, and app-based programming. Content tailored for WhatsApp, TikTok, and YouTube is crucial in reaching and engaging Gen Z and millennials.

❖ **Rising Demand for On-Demand and Interactive Content**

- The trend towards on-demand, user-driven content, especially among younger demographics calls for investment in platforms offering time-shifted and personalized experiences. Broadcasters can leverage this through apps and hybrid models combining live programming with digital replays and engagement.