COMMUNICATIONS AUTHORITY OF KENYA

AUDIENCE MEASUREMENT AND INDUSTRY TRENDS REPORT

November 2025

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1. INTRODUCTION

Kenya's media industry continues to evolve dynamically, reflecting the country's growing digital maturity and shifting audience habits. With over 200 radio stations broadcasting in local and vernacular languages, the radio sector remains a dominant and trusted medium across diverse communities. The transition to digital terrestrial broadcasting in 2015 opened up the television landscape, increasing channel diversity and competition. At the same time, mobile technology has propelled internet penetration, positioning Kenya among Africa's most digitally connected nations.

This transformation has reshaped how Kenyans access, consume, and engage with media content. A growing number of audiences now use hybrid models, combining traditional radio and TV with online streaming, social media, and on-demand platforms such as YouTube, TikTok, and podcasts. Younger audiences (aged 15–34 years) are driving this shift, favoring digital and interactive formats, while older audiences remain loyal to traditional radio and TV programming, especially vernacular and community-based stations.

However, the rapidly changing media environment presents both opportunities and challenges. Increased digital consumption has intensified competition for audience attention, fragmented viewership across multiple platforms, and raised concerns around misinformation, content regulation, and monetization. Meanwhile, traditional broadcasters are adapting to remain relevant through cross-platform strategies, digital migration, and localized content innovation.

Within this context, research plays a central role in guiding the industry's evolution. The Audience Measurement and Industry Trends Study provides reliable, evidence-based insights on listenership, viewership, and digital consumption patterns across Kenya. The findings help broadcasters, advertisers, and regulators make informed decisions ranging from content strategy and advertising investment to policy formulation and technology adaptation.

As Kenya's media ecosystem continues its transition toward integrated digital-broadcast models, sustained investment in audience research will remain essential for building a resilient, competitive, and inclusive media industry that reflects the needs, diversity, and aspirations of the Kenyan audience.

2. MEDIA AUDIENCE MEASUREMENT

2.1. Ways in Which Media is Consumed

Across all four quarters, media consumption patterns demonstrated remarkable stability. This stability highlights the central role of mobile phones in facilitating access to digital content, particularly social media while traditional devices continue to anchor engagement with legacy media such as radio and television. The steady usage trends point to deeply rooted habits, even as subtle changes begin to reveal the early stages of media convergence and an increasing shift toward mobile-first consumption.

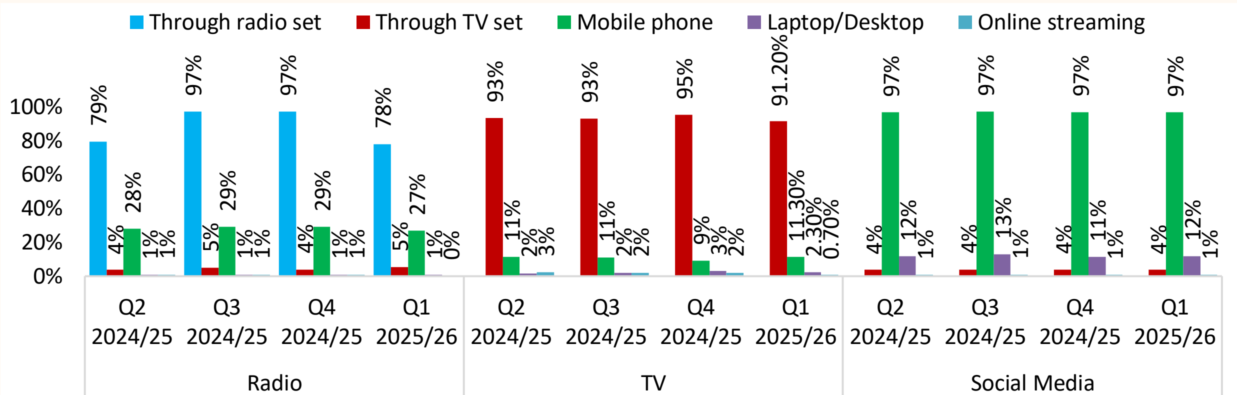


Figure 1: Ways in which media is consumed by total

2.2. Place of Media Consumption

Media consumption patterns by place of consumption remained largely consistent across all four quarters, the home continues to be the primary setting for engaging with media, with television slightly outperforming radio in this environment. In contrast, television dominates workplace consumption. Social venues such as bars, restaurants, and hotels also show a clear preference for television content.

Table 1: Place of media consumption by total

Place of Media Consumption	Total				Radio				TV			
	Q2 2024/25	Q3 2024/25	Q4 2024/25	Q1 2025/26	Q2 2024/25	Q3 2024/25	Q4 2024/25	Q1 2025/26	Q2 2024/25	Q3 2024/25	Q4 2024/25	Q1 2025/26
At own home	89%	89%	90%	90%	87%	86%	87%	88%	86%	86%	86%	90%
Place of work	4%	4%	4%	3%	3%	3%	3%	3%	4%	4%	4%	4%
Bar/Restaurant/Hotel	2%	2%	2%	6%	2%	3%	3%	5%	7%	7%	7%	8%
Someone else's household	3%	2%	3%	1%	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%	2%	2%	2%	2%	2%	0%	0%	0%	0%
On the move	0%	1%	1%	1%	1%	1%	1%	1%	0%	0%	0%	0%

2.3. Access and usage of traditional media & digital media

Media access and usage over the past four quarters (Q2 2024/25- Q1 2025/26) has shown notable consistency. Radio and television remain the most widely accessed media, each having a slight drop of1% across all quarters. Internet access slightly increases, with usage holding at 57-60% throughout the year. Notably, newspaper readership stagnating at 19%. Magazine access, while the least consumed medium, remained consistently low at 8-7%, showing no significant shifts.

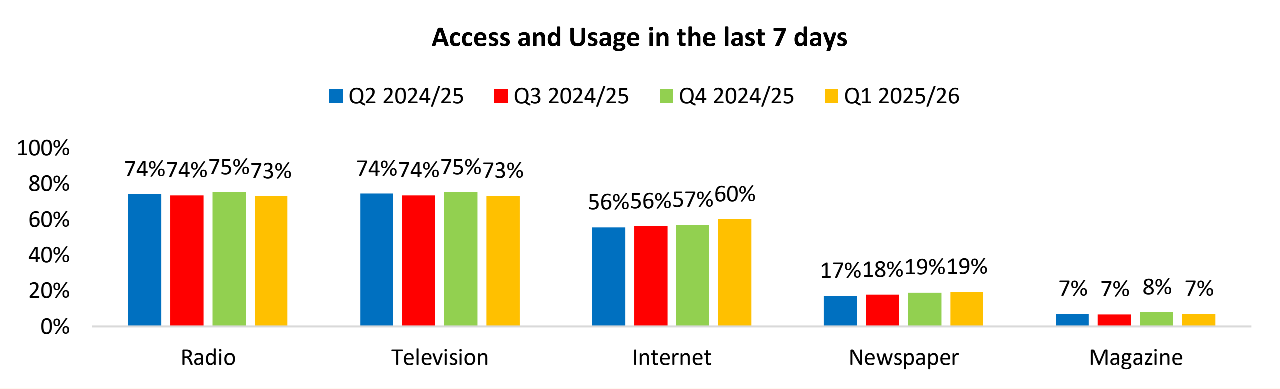


Figure 2: Access and Usage of media by total

The findings reveal a consistent gender gap in media consumption across all quarters. Male respondents report higher levels of engagement with both traditional and digital media than their female counterparts. Men are more likely to access television and radio, and they show stronger usage of internet-based platforms, including digital news. Print media, such as newspapers and magazines, also see relatively higher consumption among men, underscoring a persistent disparity in access and usage by gender.

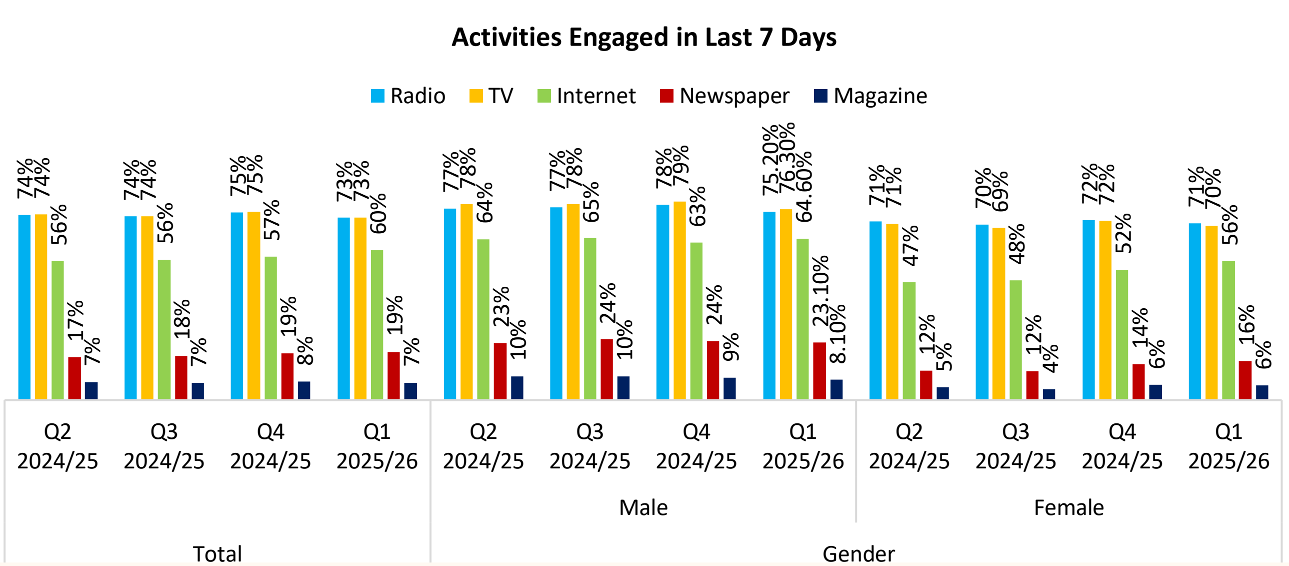


Figure 3: Activities Engaged in Last 7 Days - by total & gender

Among individuals in the LSM 1 to 4 category, radio remains the dominant medium due to its accessibility and affordability. Radios, particularly battery-operated ones, are more practical for households that may lack consistent electricity or the infrastructure required to support television usage. This makes radio a more viable and reliable source of information and entertainment for lower-income groups. Equally, in urban areas and among individuals in the higher LSM 12+ category, television consumption is notably higher. These groups typically have better access to electricity, internet, and a wider range of media devices, enabling more frequent and diverse engagement with TV content. This contrast highlights the influence of both socio-economic status and infrastructure availability on media consumption preferences.

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

		Quarter	Radio	TV	Internet	Newspaper	Magazine
Total		Q2 2024/25	74%	74%	56%	17%	7%
		Q3 2024/25	74%	74%	56%	18%	7%
		Q4 2024/25	75%	75%	57%	19%	8%
		Q1 2025/26	73%	73%	60%	19%	7%
LSM Group	LSM 1 to 4	Q2 2024/25	90%	26%	8%	2%	1%
		Q3 2024/25	90%	24%	8%	3%	1%
		Q4 2024/25	90%	28%	8%	2%	1%
		Q1 2025/26	90%	24%	9%	3%	2%
	LSM 5 to 7	Q2 2024/25	74%	69%	29%	7%	2%
		Q3 2024/25	74%	69%	28%	7%	2%
		Q4 2024/25	75%	68%	29%	7%	2%
		Q1 2025/26	76%	65%	26%	7%	3%
	LSM 8 to 11	Q2 2024/25	71%	86%	74%	21%	8%
		Q3 2024/25	71%	85%	75%	21%	8%
		Q4 2024/25	73%	86%	74%	22%	8%
		Q1 2025/26	72%	80%	75%	21%	7%
	LSM 12+	Q2 2024/25	70%	92%	92%	39%	20%
		Q3 2024/25	68%	92%	92%	39%	17%
		Q4 2024/25	70%	93%	92%	41%	20%
		Q1 2025/26	63%	92%	92%	38%	15%

In Q1 2025/26, radio and television was the most accessed medium nationally at 73%, with the highest regional figures recorded in Lower Eastern (83%), Lake (83%), Rift (82%) and Western (84%). Television viewership peaked in Nairobi (81%) and Upper Eastern (80%), with strong performance also in Central (78%) and Lake (79%), driven by better infrastructure and access. Internet access remained highest in Nairobi at 80%, followed by North Eastern at 76%, reflecting continued growth in digital engagement. Newspaper readership reached its highest levels in Lake and Lower Eastern at (22%), while magazine readership remained low overall, with only Lower Eastern (12%), and Lake (9%).

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

	Quarter	Radio	TV	Internet	Newspaper	Magazine
Total	Q2 2024/25	74%	74%	56%	17%	7%
	Q3 2024/25	74%	74%	56%	18%	7%
	Q4 2024/25	75%	75%	57%	19%	8%
	Q1 2025/26	73%	73%	60%	19%	7%
Central	Q2 2024/25	73%	83%	52%	18%	7%
	Q3 2024/25	74%	81%	55%	18%	6%
	Q4 2024/25	70%	71%	54%	17%	9%
	Q1 2025/26	71%	78%	60%	20%	5%
Coast	Q2 2024/25	67%	69%	54%	16%	8%
	Q3 2024/25	67%	67%	54%	14%	7%
	Q4 2024/25	70%	71%	54%	17%	9%
	Q1 2025/26	71%	68%	58%	11%	5%
Lake	Q2 2024/25	81%	75%	51%	20%	9%
	Q3 2024/25	81%	74%	52%	21%	9%
	Q4 2024/25	81%	76%	52%	21%	10%
	Q1 2025/26	83%	74%	53%	22%	9%
Lower Eastern	Q2 2024/25	87%	68%	50%	14%	8%
	Q3 2024/25	82%	71%	50%	16%	8%
	Q4 2024/25	86%	69%	52%	16%	8%
	Q1 2025/26	83%	72%	52%	22%	12%
Nairobi	Q2 2024/25	62%	82%	79%	19%	7%
	Q3 2024/25	62%	83%	77%	21%	6%
	Q4 2024/25	64%	85%	80%	21%	8%
	Q1 2025/26	60%	81%	80%	21%	7%
North Eastern	Q2 2024/25	43%	66%	83%	19%	13%
	Q3 2024/25	39%	66%	80%	13%	8%
	Q4 2024/25	45%	69%	84%	18%	10%
	Q1 2025/26	30%	68%	76%	19%	3%
North Western	Q2 2024/25	55%	72%	55%	13%	3%
	Q3 2024/25	57%	70%	58%	16%	6%
	Q4 2024/25	53%	73%	60%	15%	4%
	Q1 2025/26	61%	67%	69%	16%	6%
Rift	Q2 2024/25	80%	75%	53%	19%	8%
	Q3 2024/25	81%	71%	53%	20%	9%
	Q4 2024/25	81%	75%	55%	20%	8%
	Q1 2025/26	82%	68%	56%	20%	7%
South Nyanza	Q2 2024/25	82%	62%	49%	15%	6%
	Q3 2024/25	80%	64%	46%	17%	6%
	Q4 2024/25	84%	63%	50%	16%	7%
	Q1 2025/26	79%	68%	49%	20%	8%

Upper Eastern	Q2 2024/25	78%	79%	56%	13%	6%
	Q3 2024/25	78%	77%	57%	14%	6%
	Q4 2024/25	78%	79%	58%	15%	5%
	Q1 2025/26	76%	80%	64%	18%	6%
Western	Q2 2024/25	83%	67%	48%	18%	6%
	Q3 2024/25	82%	67%	48%	18%	6%
	Q4 2024/25	84%	68%	50%	20%	6%
	Q1 2025/26	81%	69%	53%	20%	8%

2.4. Number of Media Consumed

In Q1 2025/26, the share of individuals consuming only one media platform increased slightly to 26%, reversing the gradual upward trend observed in previous quarters.

Consumption of two media platforms slightly dropped from 35% to 33% in Q1 2025/26, highlighting continued moderate cross-platform behavior.

Notably, multiple media consumption (three or more platforms) remained constant after, rebounding from the decline seen in Q3 (34.3%) and Q2 (38.0%).

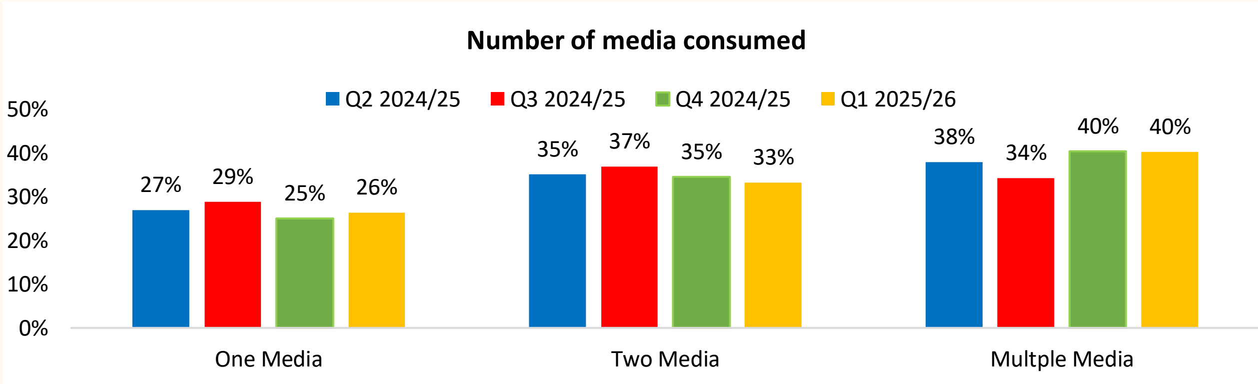


Figure 4: Number of media consumed by total

2.5. Type of Media Consumed

Across the four quarters, media consumption patterns consistently show a preference for multi-platform engagement, particularly the combination of radio, television, and online platforms. The three media remained the most dominant media mix, with its highest uptake in Q3 at 28.1%, before settling at 21.4% in Q4 then to 20.8% to Q1 2025/26. Similarly, the combination of radio and TV remained steadily popular, though slightly declined in Q1 to 14.7%. Radio-only users accounted for 14.5% in Q1, indicating that while digital platforms continue to grow, traditional media still hold significant ground, especially among single-platform users. The share of audiences using only TV or only online remained relatively stable, while niche combinations like radio + print, or TV + print + online maintained low but consistent patterns, reinforcing that core media channels (radio, TV, and online) continue to shape the dominant media habits in Kenya.

Table 4: Type of media Consumed by total

Type of Media Consumed	Q2 2024/25	Q3 2024/25	Q4 2024/25	Q1 2025/26
Radio+TV+Online	20.70%	28.10%	21.40%	20.8%
Radio+TV	17.50%	18.90%	17.10%	14.7%

Radio Only	15.40%	16.00%	14.40%	14.5%
All Media	12.40%	4.70%	13.70%	13.1%
TV+Online	11.70%	12.90%	11.50%	11.9%
TV Only	7.30%	7.60%	6.50%	6.5%
Online Only	4.20%	5.00%	4.00%	5.3%
Radio+Online	4.00%	4.60%	4.00%	5.0%
Radio+TV+Print	3.10%	0.90%	3.30%	3.1%
TV+Print+Online	1.40%	0.50%	1.50%	2.3%
Print+Online	0.90%	0.30%	0.80%	0.5%
Radio+Print	0.60%	0.20%	0.70%	0.7%
Radio+Print+Online	0.50%	0.20%	0.50%	0.9%
TV+Print	0.40%	0.10%	0.40%	0.4%
Print Only	0.10%	0.00%	0.10%	0.0%

2.6. Frequency of Media Consumption

In Q1 2025/26, daily media use remained highest for TV, radio, and social media, each maintaining stable engagement levels. TV and radio were consumed daily by about half of the population, while social media saw a slight recovery. Online video streaming and newspapers continued to show low daily use, with most users engaging rarely or not at all. Overall, regular consumption remains concentrated on broadcast and digital platforms, while print media lags behind.

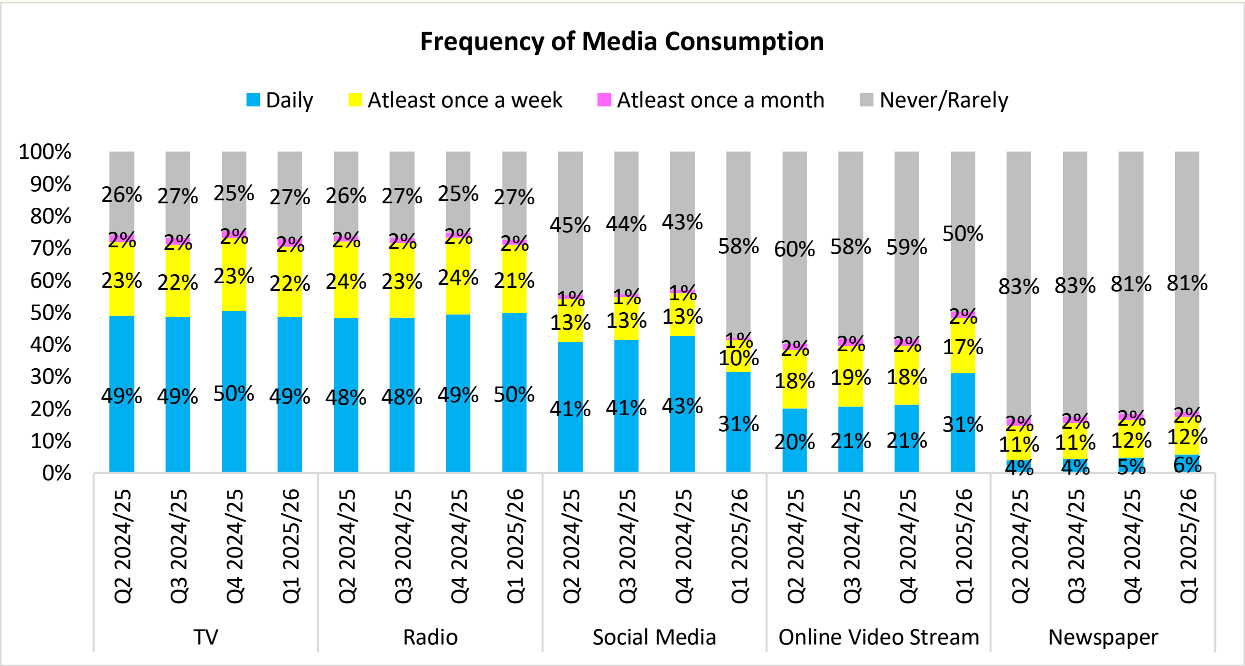


Figure 5: Frequency of consuming Tv, radio, social media, online streams and newspapers

2.7. Demographics of Media Consumers Profiles

In Q1 2025/26, gender differences in media consumption remained consistent with previous quarters. Males continued to dominate in newspaper readership and online usage, while radio and TV use was nearly balanced across genders. Youth aged 18–34 remained the most active media consumers, particularly online, with the 25–34 age group leading in all four platforms. The youngest cohort (15–17 years) showed the lowest engagement, especially with traditional media. Media use among older age groups (45+ years) remained more skewed toward radio and TV, with lower online activity.

By setting, rural populations accounted for the majority of radio and TV consumption, reflecting accessibility and affordability, while urban residents dominated online and print media use. Socioeconomic differences were also clear: lower LSM groups (1–4) heavily relied on radio, with minimal access to print and digital formats. Middle LSM groups (5–7) showed moderate cross-platform usage, while higher LSM groups (8–11 and 12+) led in TV viewership, online activity, and especially newspaper readership.

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

Demographics		Financial Year	Radio Listeners, n=23.9M	TV Viewers, n=23.9M	Newspaper Readership, n=6.3M	Online Usage, n=19.6M
Gender	Male	Q2 2024/25	51%	52%	66%	57%
		Q3 2024/25	52%	52%	67%	57%
		Q4 2024/25	51%	52%	62%	54%
		Q1 2025/26	51%	51%	59%	53%
	Female	Q2 2024/25	49%	48%	35%	43%
		Q3 2024/25	48%	48%	33%	43%
		Q4 2024/25	49%	48%	39%	46%
		Q1 2025/26	49%	49%	41%	47%
Age group	15-17 years	Q2 2024/25	11%	11%	12%	15%
		Q3 2024/25	11%	11%	10%	14%
		Q4 2024/25	10%	11%	11%	15%
		Q1 2025/26	11%	11%	11%	14%
	18-24 years	Q2 2024/25	20%	23%	21%	27%
		Q3 2024/25	20%	22%	22%	27%
		Q4 2024/25	20%	23%	22%	27%
		Q1 2025/26	20%	22%	22%	27%
	25-34 years	Q2 2024/25	23%	25%	29%	31%
		Q3 2024/25	23%	26%	28%	30%
		Q4 2024/25	24%	25%	30%	30%
		Q1 2025/26	24%	26%	27%	28%
	35-44 years	Q2 2024/25	19%	18%	19%	16%
		Q3 2024/25	19%	18%	18%	16%

		Q4 2024/25	19%	18%	18%	16%
		Q1 2025/26	19%	18%	18%	16%
	45+ years	Q2 2024/25	28%	23%	20%	12%
		Q3 2024/25	27%	23%	21%	13%
		Q4 2024/25	27%	23%	20%	13%
		Q1 2025/26	27%	24%	23%	15%
Setting	Urban	Q2 2024/25	28%	35%	42%	43%
		Q3 2024/25	28%	36%	41%	43%
		Q4 2024/25	28%	36%	42%	42%
		Q1 2025/26	29%	35%	40%	42%
	Rural	Q2 2024/25	72%	65%	58%	57%
		Q3 2024/25	72%	64%	59%	57%
		Q4 2024/25	72%	65%	58%	58%
		Q1 2025/26	71%	65%	60%	59%
LSM Group	LSM 1 to 4	Q2 2024/25	17%	5%	2%	2%
		Q3 2024/25	17%	4%	2%	2%
		Q4 2024/25	15%	5%	1%	2%
		Q1 2025/26	14%	4%	1%	2%
	LSM 5 to 7	Q2 2024/25	26%	25%	10%	14%
		Q3 2024/25	27%	25%	10%	13%
		Q4 2024/25	26%	23%	10%	13%
		Q1 2025/26	24%	21%	9%	10%
	LSM 8 to 11	Q2 2024/25	43%	52%	53%	59%
		Q3 2024/25	42%	51%	53%	59%
		Q4 2024/25	44%	52%	53%	58%
		Q1 2025/26	45%	50%	49%	56%
	LSM 12+	Q2 2024/25	15%	19%	35%	26%
		Q3 2024/25	14%	20%	35%	26%
		Q4 2024/25	16%	21%	37%	27%
		Q1 2025/26	18%	26%	41%	32%

3. Radio Listenership Section

3.1. Radio Listeners' Key Demographics

Male audiences consistently report higher radio listenership than females throughout all quarters, with the most notable gap observed in Q1 2025/24 (75%) for males compared to 71% for females. Additionally, radio consumption steadily increases with age. The youngest group (15–17 years) maintains the lowest levels of listenership, while the highest figures are seen among adults aged 35–44 and 45+, with listenership reaching 78% across all quarters. This trend highlights radio's stronger appeal among older and male audiences.

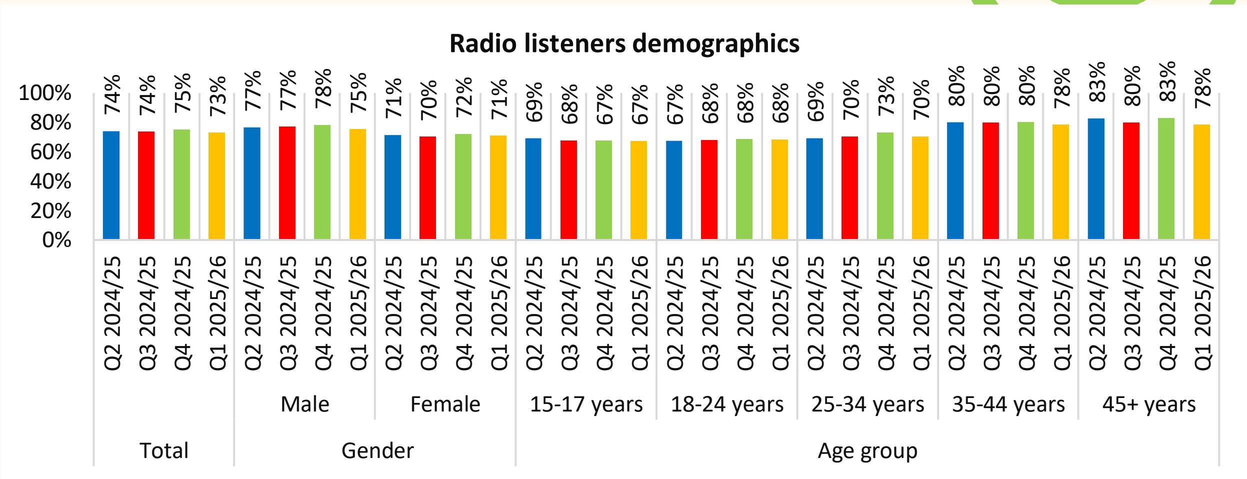


Figure 6: Demographics of radio consumers– by total, gender & age group

Radio listenership remains significantly higher in rural areas than in urban settings throughout the 2025/26 financial year, with rural audiences consistently reaching around 77%, compared to urban figures that stayed closer to the mid-60s. In terms of socioeconomic segmentation, listenership is highest among lower LSM groups (LSM 1 to 4), consistently above 90%, underscoring radio's affordability and accessibility. As LSM level rises, radio usage declines, with LSM 12+ showing the lowest engagement, stabilizing around 63%. These patterns reinforce radio's critical role as an accessible medium for lower-income and rural populations.

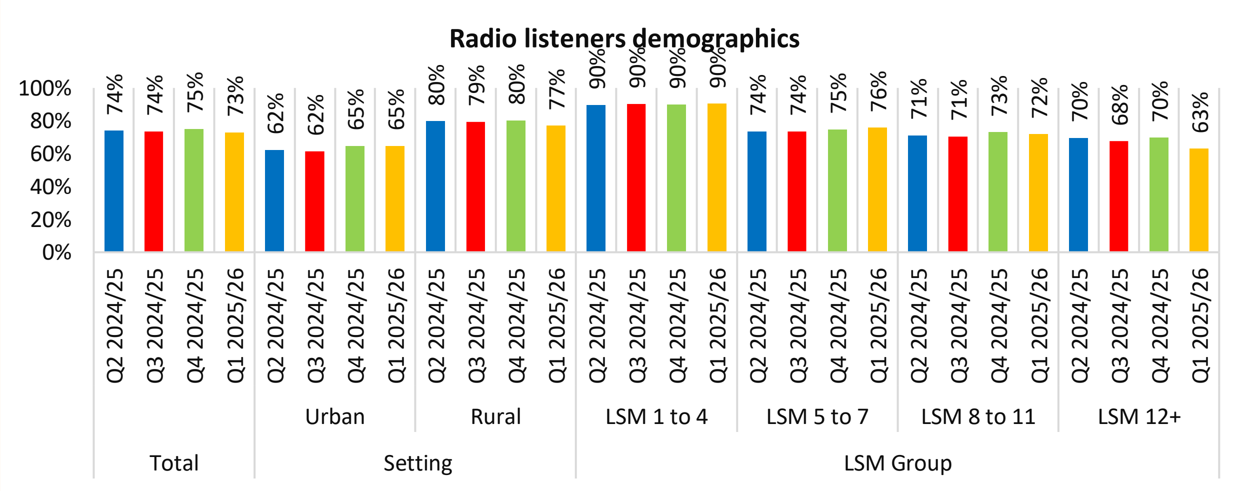


Figure 7: Demographics of radio consumers– by total, setting and LSM

In Q1 2025/26, radio listenership remained highest in Lower Eastern, Lake, Rift and Western Regions with all consistently posting engagement levels above 80%. Other regions with strong radio uptake included South Nyanza, Upper Eastern, Central, and Cost, all maintaining figures in the high 70s to low 80s. Conversely, North Eastern reported the lowest radio consumption across all quarters, dropping as low as 30% in Q1 after slightly rebounding to 45% in Q4. Similarly, North Western and Nairobi trailed national averages, highlighting regional disparities in radio access and usage.

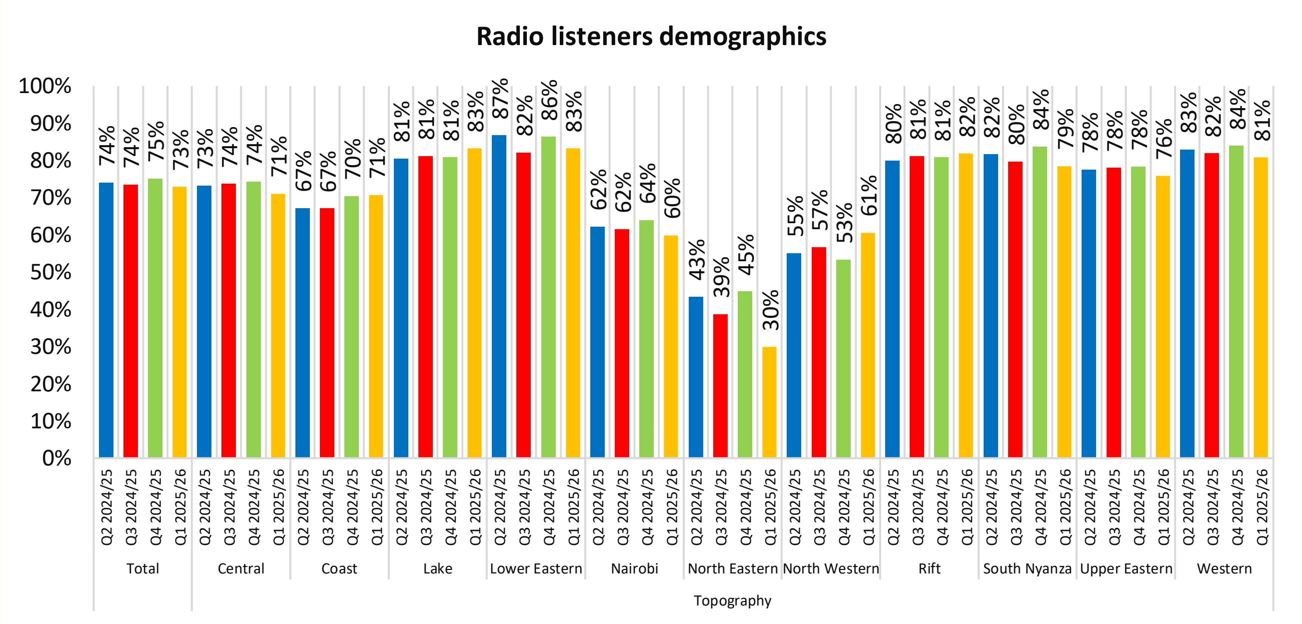


Figure 8: Demographics of radio consumers– by total, Topography

3.2. Radio Genre Preference

News and current affairs dominate Kenyan radio with 38.6% of listenership, followed by entertainment and talk shows at 23.6%.

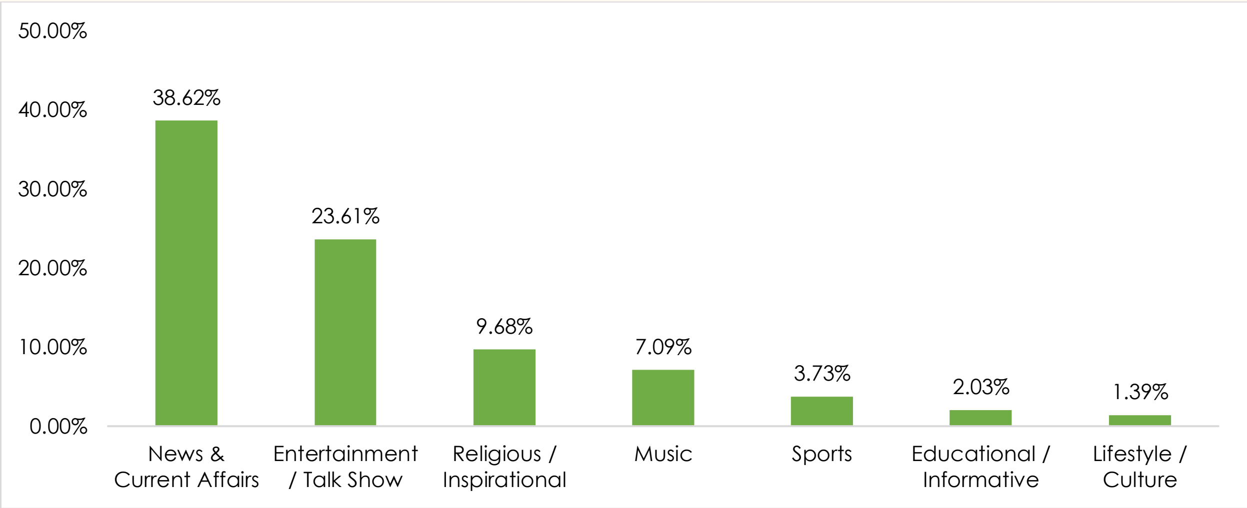


Figure 9: Radio Genre Preference

3.3. Radio Listenership Language

Swahili remains the dominant language of radio consumption across all quarters, consistently attracting the largest share of listeners among both male and female audiences. On average, over 60% of male listeners and 55% of female listeners tuned into Swahili-language stations. Vernacular stations ranked second in preference, with female audiences showing a slightly higher inclination toward them than males. English-language stations continued to attract the smallest audience share, maintaining a modest but stable presence across all quarters and genders.

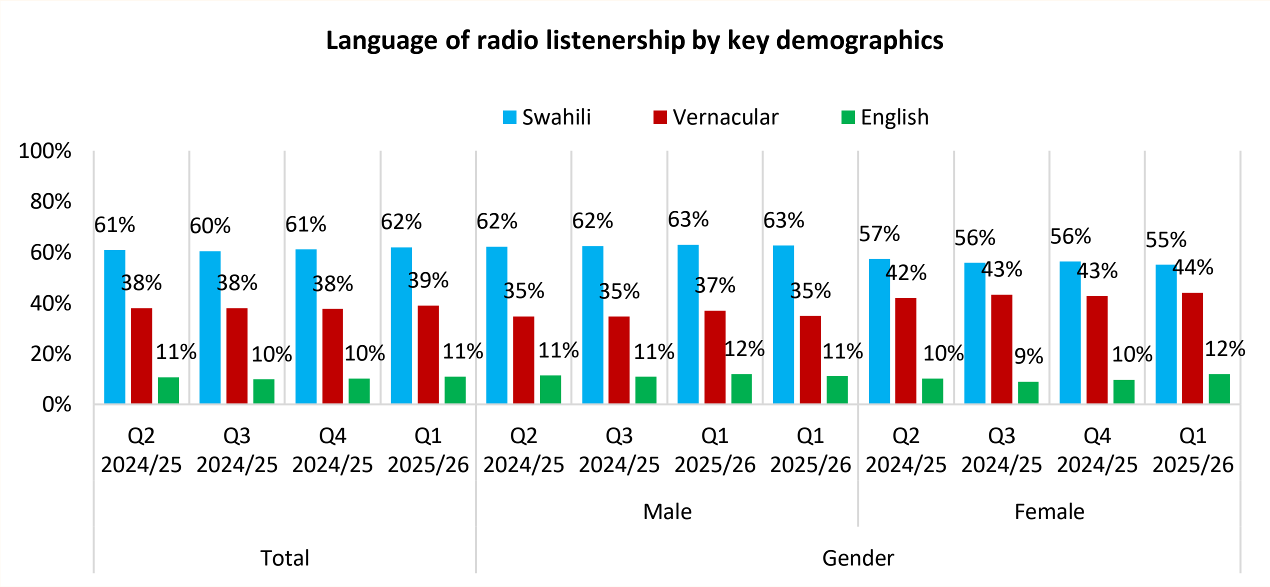


Figure 10: Radio listenership language by total and gender

Swahili remains the dominant language of radio listenership in both urban and rural settings across all quarters. However, vernacular radio is more popular in rural areas, consistently capturing a higher share than in urban areas. Urban audiences, on the other hand, demonstrate a significantly stronger preference for English-language stations, with listenership rates nearly triple those of rural areas especially notable between Q2 2024/25 and Q1 2025/26.

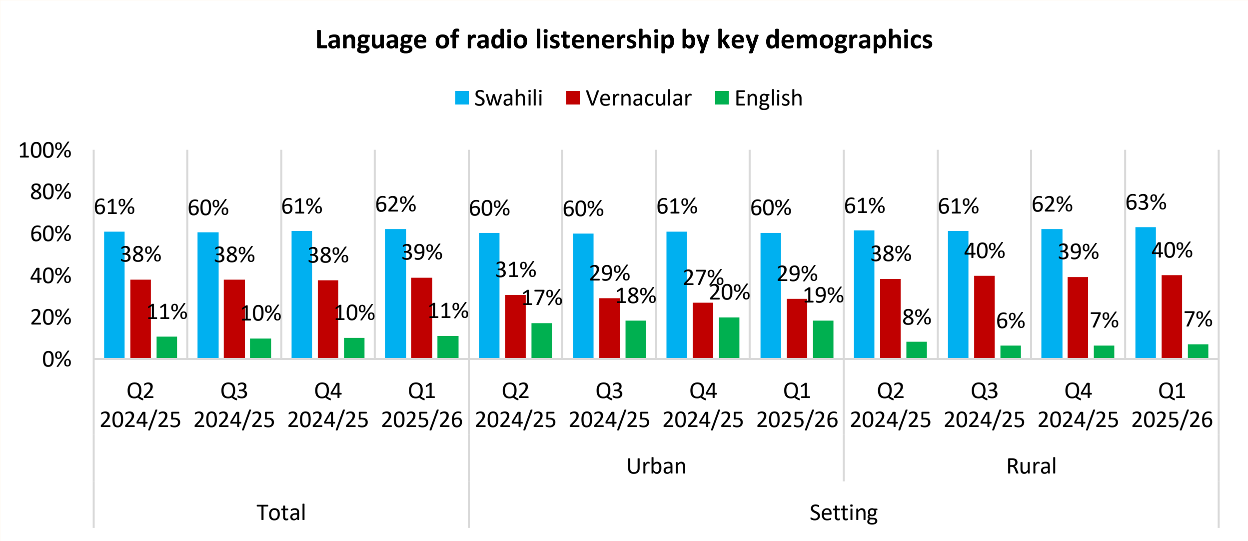


Figure 11: Radio listenership language by total & setting

Swahili and vernacular remain the dominant languages for radio among lower to middle LSM groups (LSM 1–11), with Swahili listenership consistently above 60% and vernacular ranging between 35–49%. These segments rely heavily on local-language broadcasting for accessible and relatable content. In contrast, the higher LSM group (LSM 12+) exhibits a more diversified language profile, with Swahili listenership slightly lower (around 53%) and a significant uptick in English-language consumption peaking at 17% in Q1 2025/26. This shift suggests that wealthier and more educated audiences tend to engage more with English-language stations.

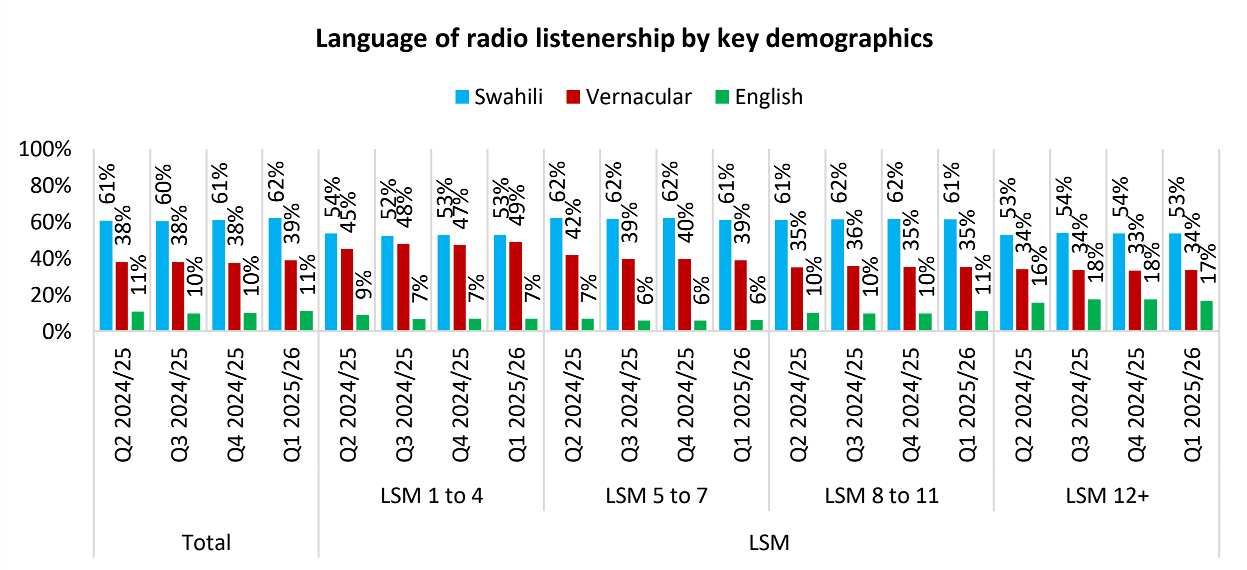


Figure 12: Radio listenership language by total & LSM

Swahili-language radio stations have the strongest following in Western and South Nyanza, where listenership consistently exceeds at 87% in Western in Q1 2025/26. Similarly, high Swahili preference is also seen in Rift and South Nyanza. Conversely, vernacular radio has its highest uptake in Lower Eastern and Lake regions, where it regularly surpasses 57% of listeners. This reflects strong cultural and linguistic ties in these areas. English-language radio, though limited in reach overall, finds relatively greater traction in urbanized regions like Nairobi and North Eastern, with Nairobi recording a consistent 21–24% share across quarters.

Table 6: Radio listenership language by total and topography

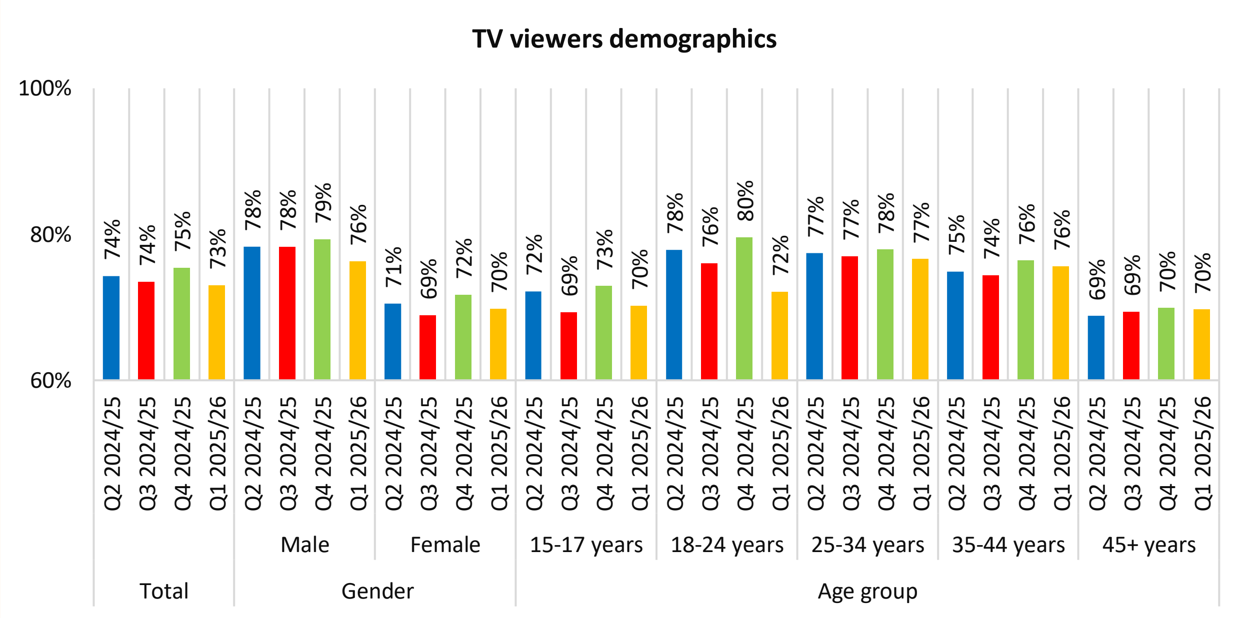
Total/ Topography		Financial Year	Radio listenership language		
			Swahili	Vernacular	English
Total		Q2 2024/25	61%	38%	11%
		Q3 2024/25	60%	39%	10%
		Q4 2024/25	60%	39%	10%
		Q1 2025/26	62%	39%	11%
Topography	Central	Q2 2024/25	46%	51%	11%
		Q3 2024/25	44%	52%	10%
		Q4 2024/25	44%	52%	11%
		Q1 2025/26	45%	53%	10%

	Coast	Q2 2024/25	62%	32%	15%
		Q3 2024/25	61%	32%	15%
		Q4 2024/25	61%	31%	15%
		Q1 2025/26	62%	32%	13%
	Lake	Q2 2024/25	49%	55%	5%
		Q3 2024/25	47%	58%	4%
		Q4 2024/25	48%	57%	5%
		Q1 2025/26	45%	58%	5%
	Lower Eastern	Q2 2024/25	40%	60%	9%
		Q3 2024/25	36%	63%	7%
		Q4 2024/25	37%	62%	8%
		Q1 2025/26	36%	63%	8%
	Nairobi	Q2 2024/25	67%	19%	21%
		Q3 2024/25	67%	16%	23%
		Q4 2024/25	67%	17%	23%
		Q1 2025/26	67%	16%	24%
	North Eastern	Q2 2024/25	54%	27%	23%
		Q3 2024/25	53%	27%	26%
		Q4 2024/25	53%	27%	26%
		Q1 2025/26	54%	27%	25%
	North Western	Q2 2024/25	67%	30%	13%
		Q3 2024/25	67%	32%	11%
		Q4 2024/25	67%	31%	12%
		Q1 2025/26	68%	33%	10%
	Rift	Q2 2024/25	68%	29%	9%
		Q3 2024/25	69%	29%	9%
		Q4 2024/25	69%	29%	9%
		Q1 2025/26	71%	30%	8%
	South Nyanza	Q2 2024/25	75%	27%	8%
		Q3 2024/25	78%	24%	6%
		Q4 2024/25	78%	24%	7%
		Q1 2025/26	77%	25%	6%
	Upper Eastern	Q2 2024/25	49%	46%	9%
		Q3 2024/25	47%	49%	9%
		Q4 2024/25	48%	48%	9%
		Q1 2025/26	49%	51%	8%
	Western	Q2 2024/25	85%	17%	5%
		Q3 2024/25	88%	16%	3%
		Q4 2024/25	88%	16%	4%
		Q1 2025/26	87%	17%	4%

4. TV Viewership Section

4.1. TV Viewer's Key Demographics

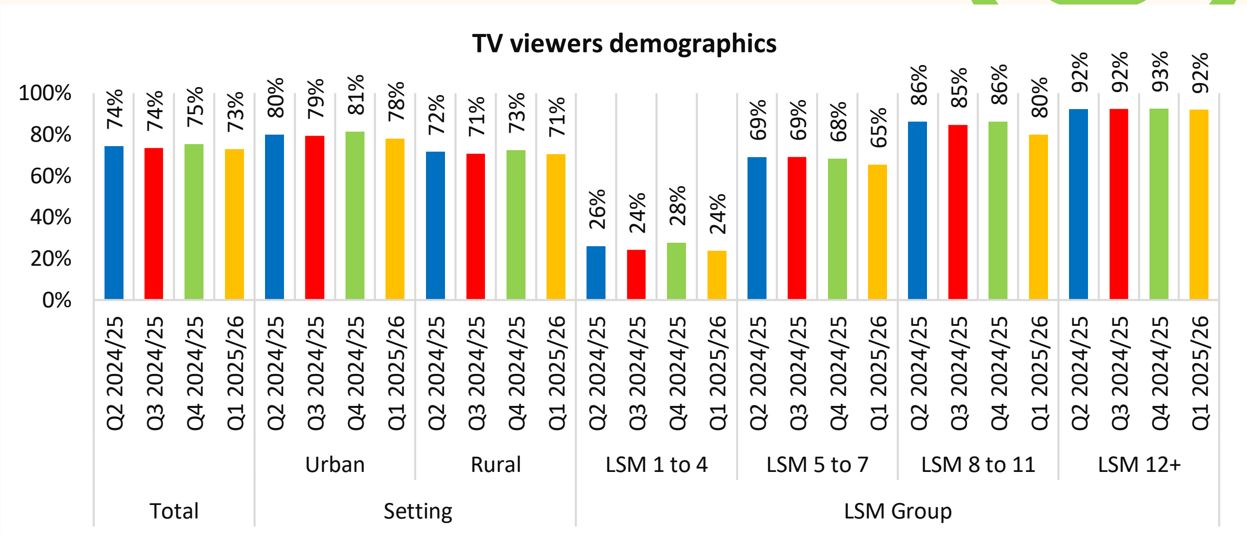
TV viewership remains consistently higher among males compared to females across all four quarters, with the gender gap most noticeable in Q4 2024/25 and Q1 2025/26. Age-wise, the highest engagement is observed among youth aged 35-44 years, with viewership retaining at 76%, suggesting content appeal is strongest among middle aged audiences. However, there's a clear decline in viewership among those aged 18-24 years, which dropped from 80% to 72% Q1 2025/26. This downward trend may reflect a lack of age-inclusive programming, pointing to a missed opportunity by broadcasters to engage younger audiences more effectively.



N=32.23M: All Respondents

Figure 13: TV Viewership demographics – by total, gender and age group

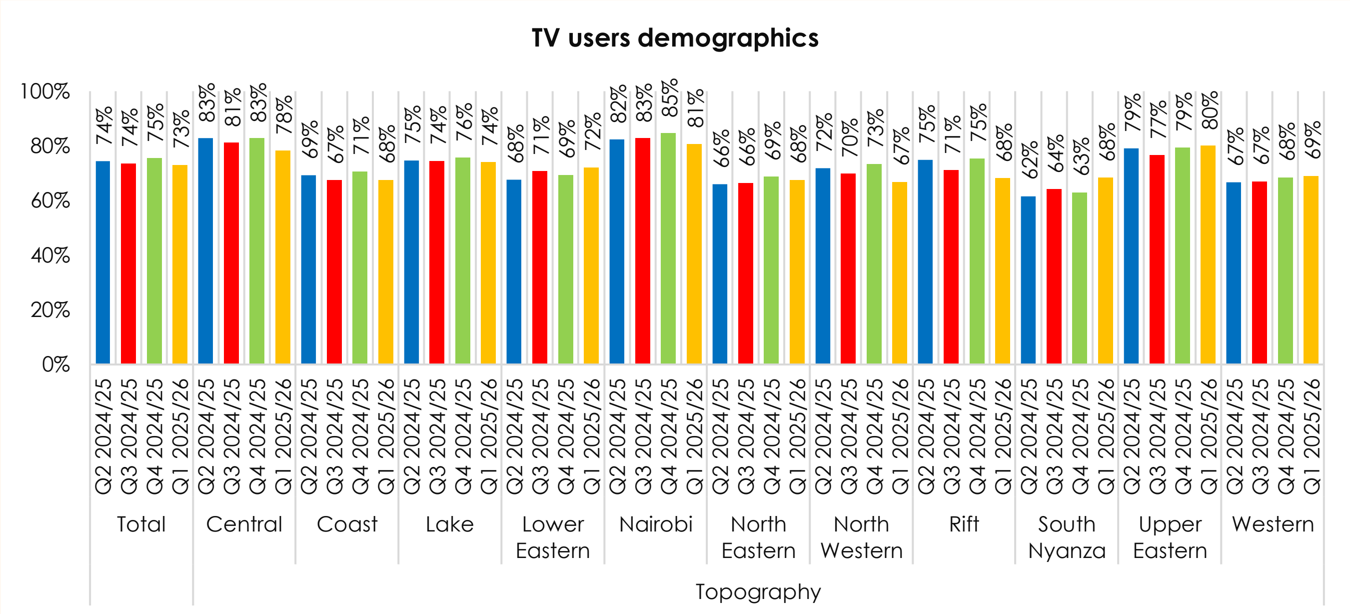
TV viewership remains consistently higher in urban areas than in rural settings across all quarters, with urban audiences recording figures above 80% compared to rural levels averaging around 73%. Socioeconomic status reveals even more pronounced disparities: viewership among LSM 1 to 4 is significantly lower, likely due to limited access to TV sets or electricity. In contrast, viewership peaks among LSM 12+, reaching above 90% in every quarter, followed closely by LSM 8 to 11. These patterns highlight the strong link between income level and access to television, emphasizing the need for inclusive media strategies that consider both geographic and economic disparities.



N=32.23M: All Respondents

Figure 14: TV Viewership demographics – by total, setting and LSM

TV viewership is highest in Nairobi and Upper Eastern, both consistently registering figures above 80% in Q1 2025/26. These are followed by Central, which drastically dropped to 78% in the recent quarter. In contrast, North Western reports the lowest TV viewership indicating significant regional disparities. Other regions like Central, Lower Eastern, and Lake maintain moderate engagement levels, generally within the 70–75% range.



N=32.23M: All Respondents

Figure 15: TV Viewership demographics – by total and topography

4.2. TV Viewership Language

English & Swahili dominate across all regions, the majority of viewers (83% nationally) consume TV content in both English and Swahili. English-only viewership remains low (typically under 10%), suggesting that audiences prefer bilingual delivery for accessibility. Swahili-only content accounts for less than 5% across all regions, reflecting limited exclusive Swahili programming outside bilingual formats. Vernacular content maintains regional significance, particularly in Central, Lake, Nairobi, Lower and Upper Eastern.

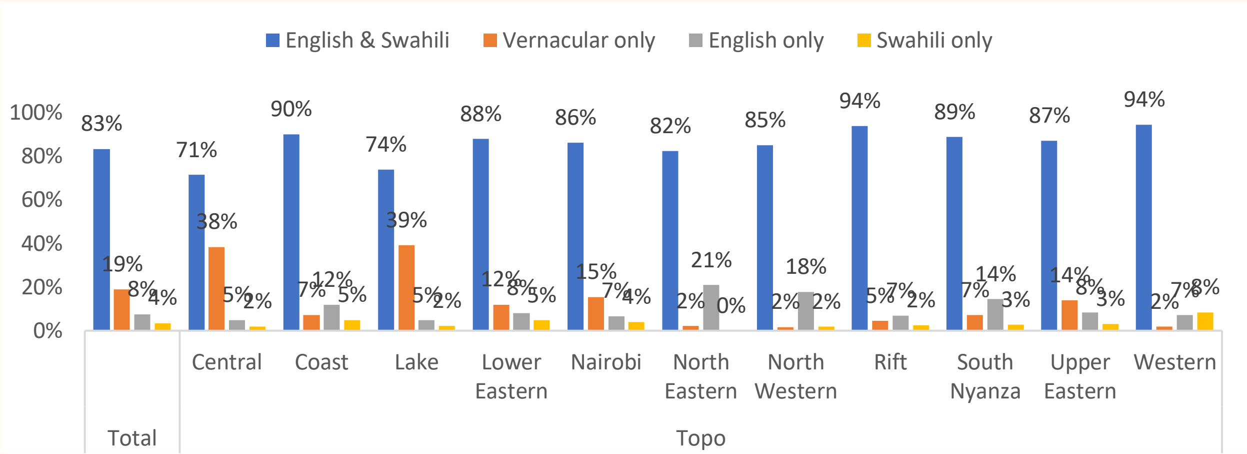


Figure 16: TV Viewership demographics – by total and topography

4.3. TV Genre Preference

News leads TV viewership in Kenya at 32.4%, followed by Entertainment and Drama at 25.7%, while Sports holds 9.6%, boosted by major tournaments.

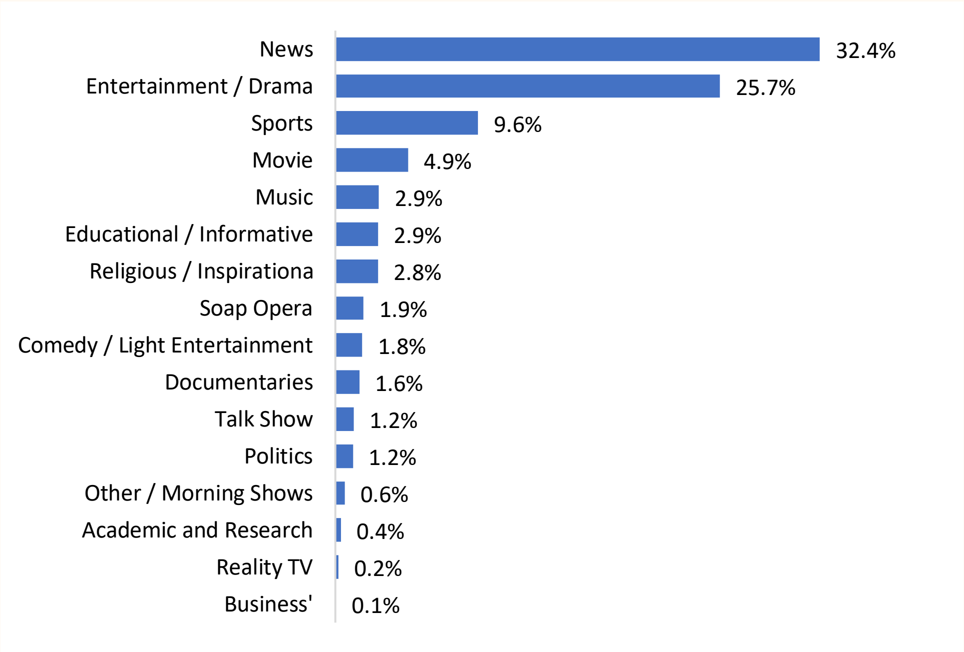
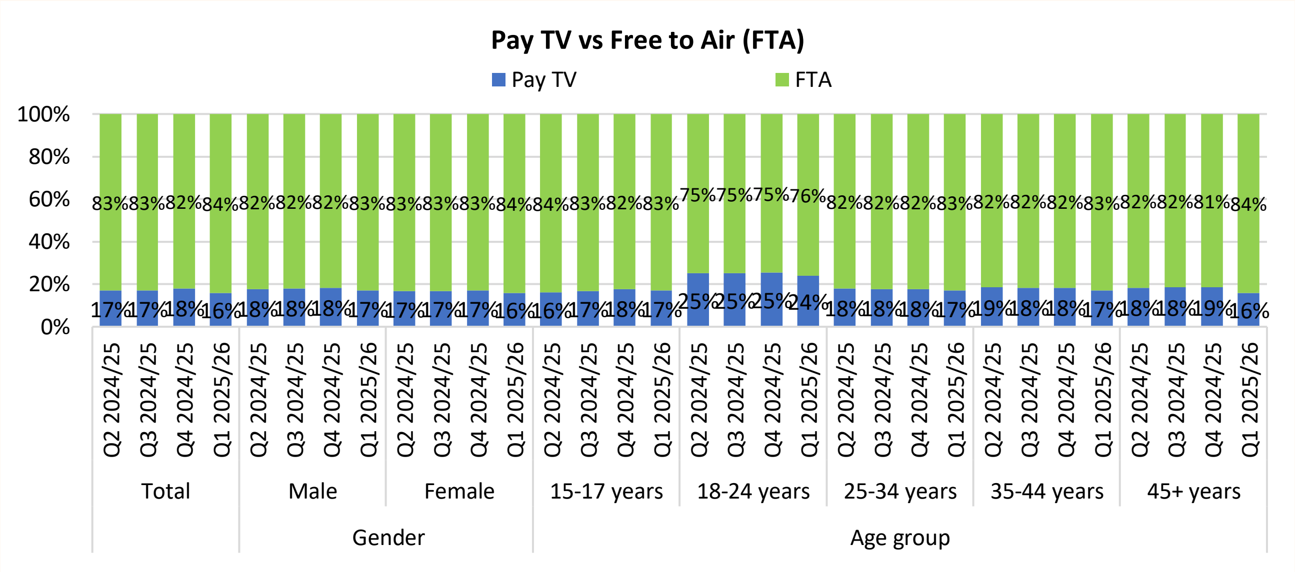


Figure 17: TV Genre Preference

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

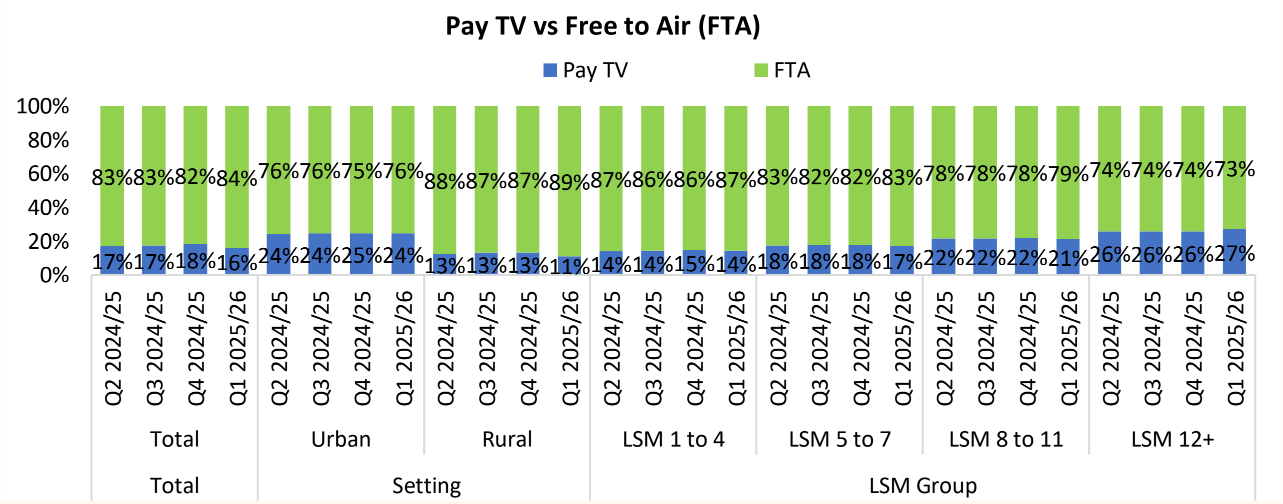
In Kenya, Free-to-Air (FTA) television commands significantly broader viewership compared to Pay TV. While reach for both FTA and Pay TV shows no notable variation by gender, Pay TV tends to have slightly higher reach among younger audiences—particularly those aged 18 to 24 years—compared to older age groups.



n=24.3M: Average Daily TV Viewers

Figure 18:Pay TV vs Free to Air TV Reach – total, gender and age

Pay TV access in Kenya is more prevalent in urban areas and among higher-income households. Urban residents consistently report higher Pay TV reach compared to their rural counterparts. Similarly, individuals in the highest LSM group (LSM 12+) exhibit greater access to Pay TV than those in lower LSM categories. Despite this, Free-to-Air (FTA) TV maintains dominant reach across all settings and socio-economic groups.



n=24.3M: Average Daily TV Viewers

Figure 19: Pay TV vs Free to Air TV Reach - total and LSM

4.5. Exposure to impact of advertising

Optimal Advertising Impact Window: 19:00–22:00

Advertisers achieve the highest impact between 19:00 and 22:00, supported by the largest simultaneous rise in audience size and ad activity. However, there is room to optimize frequency and reduce waste by cutting back ads in late-night hours and midday low-engagement slots, while reinforcing morning and early-evening blocks for better reach-cost balance.

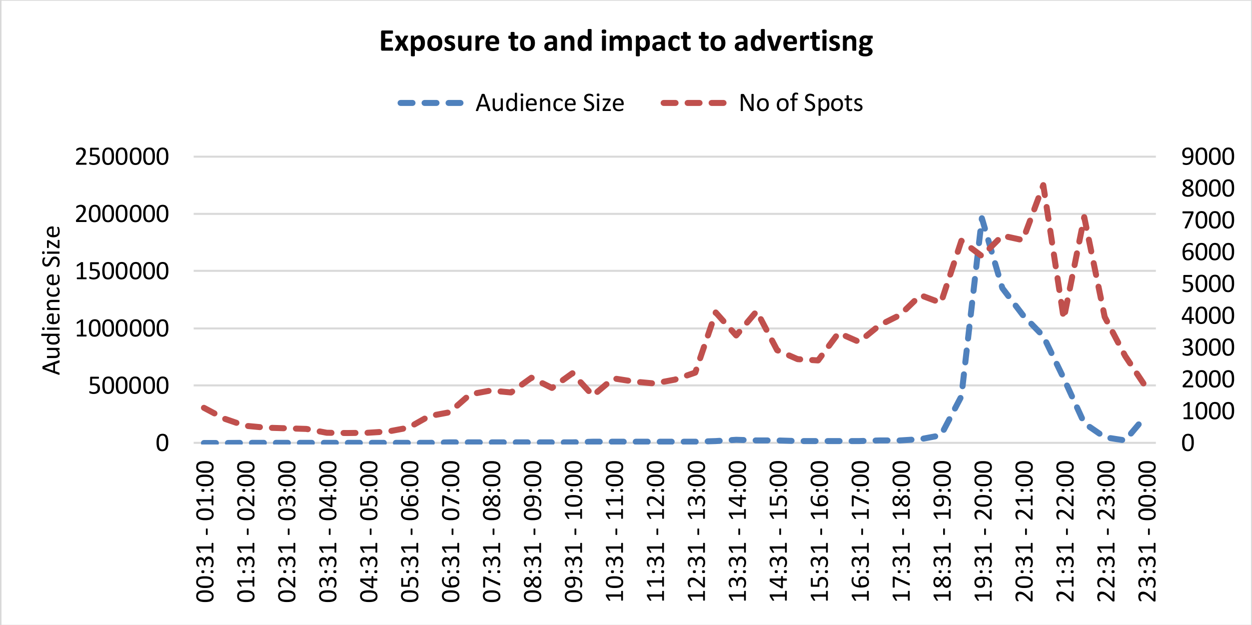


Figure 20: TV exposure to and impact to advertising

5. Internet Usage

5.1. Internet Access by Demographics

Over half of the surveyed population report using the internet, with a notable gender gap: male respondents consistently report higher internet usage than females across all quarters. Age remains a strong determinant of internet access. Usage is highest among younger age groups particularly those aged 15–24 years, where penetration exceeds 70%. Internet usage then declines steadily with age, with the lowest levels recorded among respondents aged 45 years and above, where usage remains below 40%.

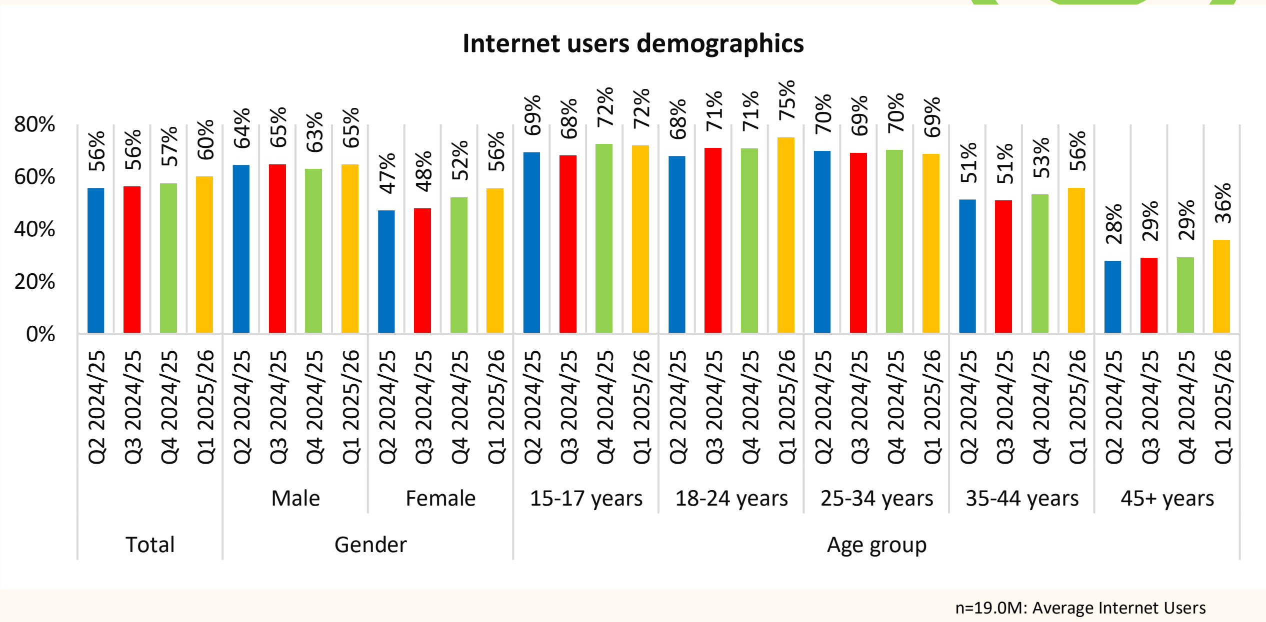


Figure 21: Internet users' demographics – total, gender and age group

The widespread internet access observed in Kenyan urban areas is primarily driven by robust digital infrastructure, including expansive broadband networks and reliable mobile coverage. Urban dwellers also enjoy greater socioeconomic advantages, such as higher income levels and better access to digital devices, facilitating quicker adoption of new technologies. Additionally, internet usage increases consistently with higher Living Standards Measure (LSM) scores, highlighting the strong link between income, education, and digital engagement within Kenya's shifting media landscape.

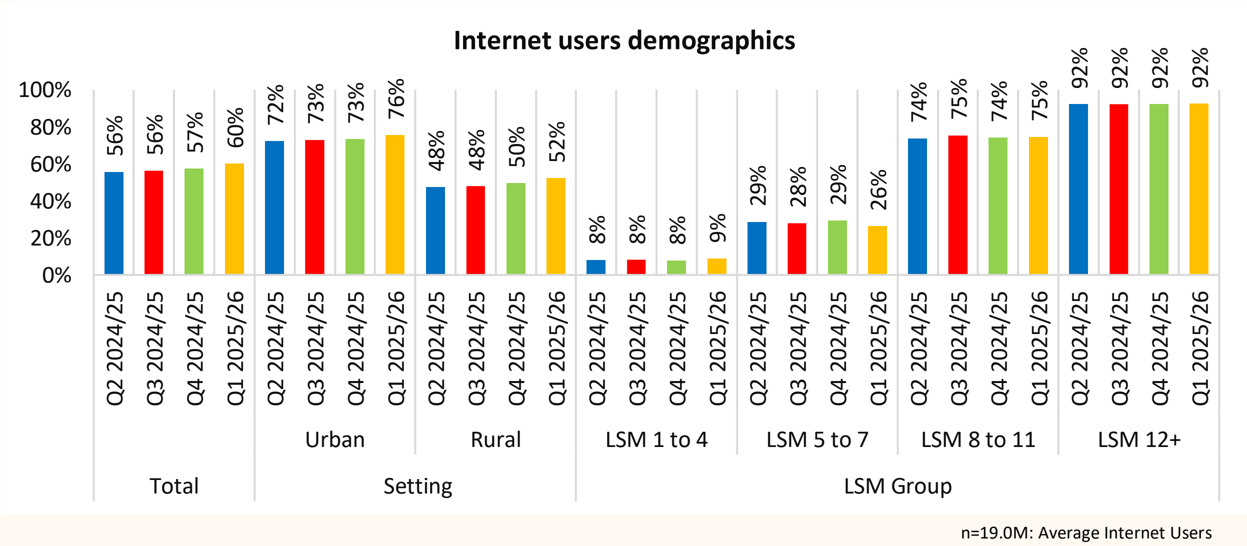
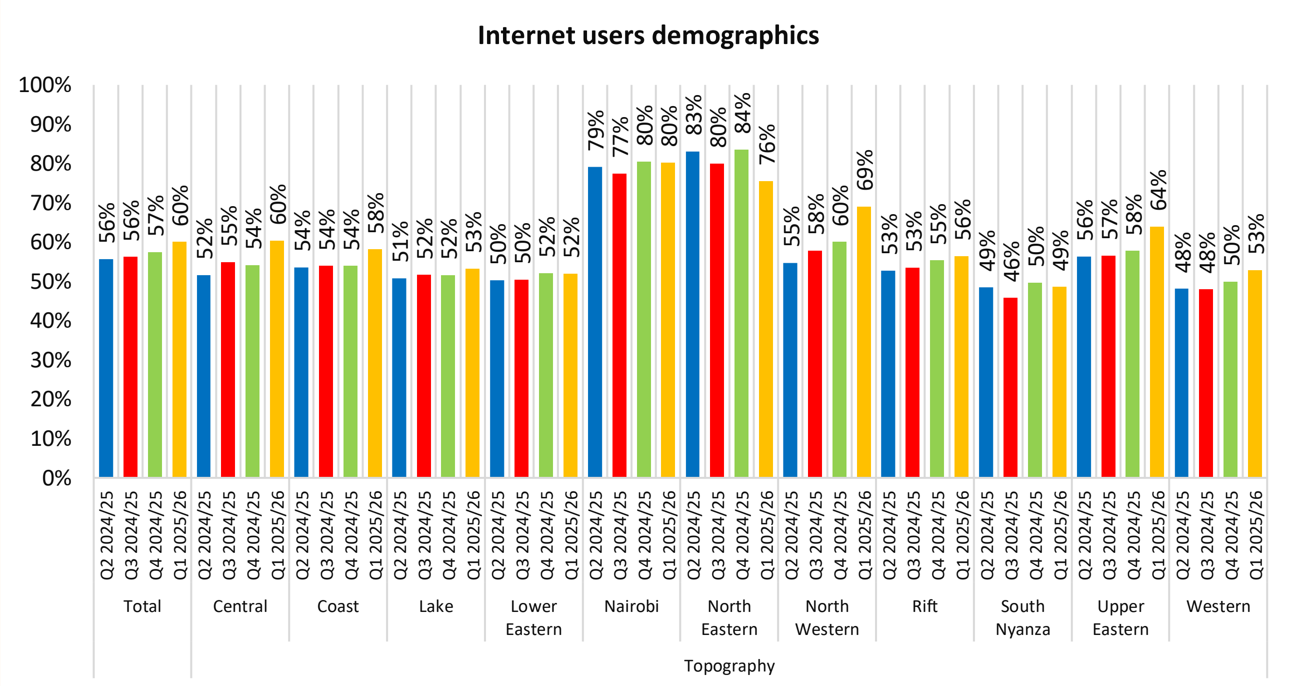


Figure 22: Internet users' demographics – total, setting and LSM

There are clear regional disparities in internet accessibility across Kenya. Nairobi leads in internet usage, consistently reporting the highest levels of access, closely followed by North Eastern, which also benefits from advanced digital infrastructure and high urban concentration. At the other end of the spectrum, South Nyanza records the lowest internet penetration, highlighting a stark digital divide shaped by regional infrastructure, socio-economic conditions, and investment in connectivity.



n=19.0M: Average Internet Users

Figure 23: Internet users' demographics – total and topography

5.2. Devices Used

The majority of Kenyans access the internet primarily through smartphones, underscoring the critical role these devices play in enabling connectivity and access to information. As mobile technology continues to evolve, ensuring affordable and widespread access to smartphones becomes essential for promoting digital inclusion and bridging the connectivity gap across socio-economic and geographic groups.

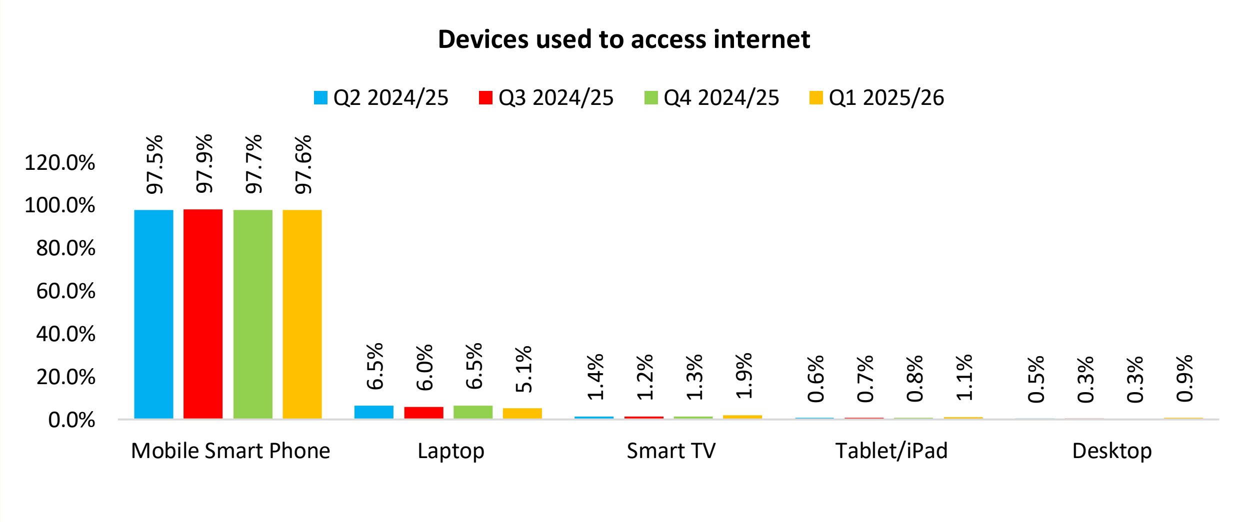


Figure 24:Devices used to access the internet

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.

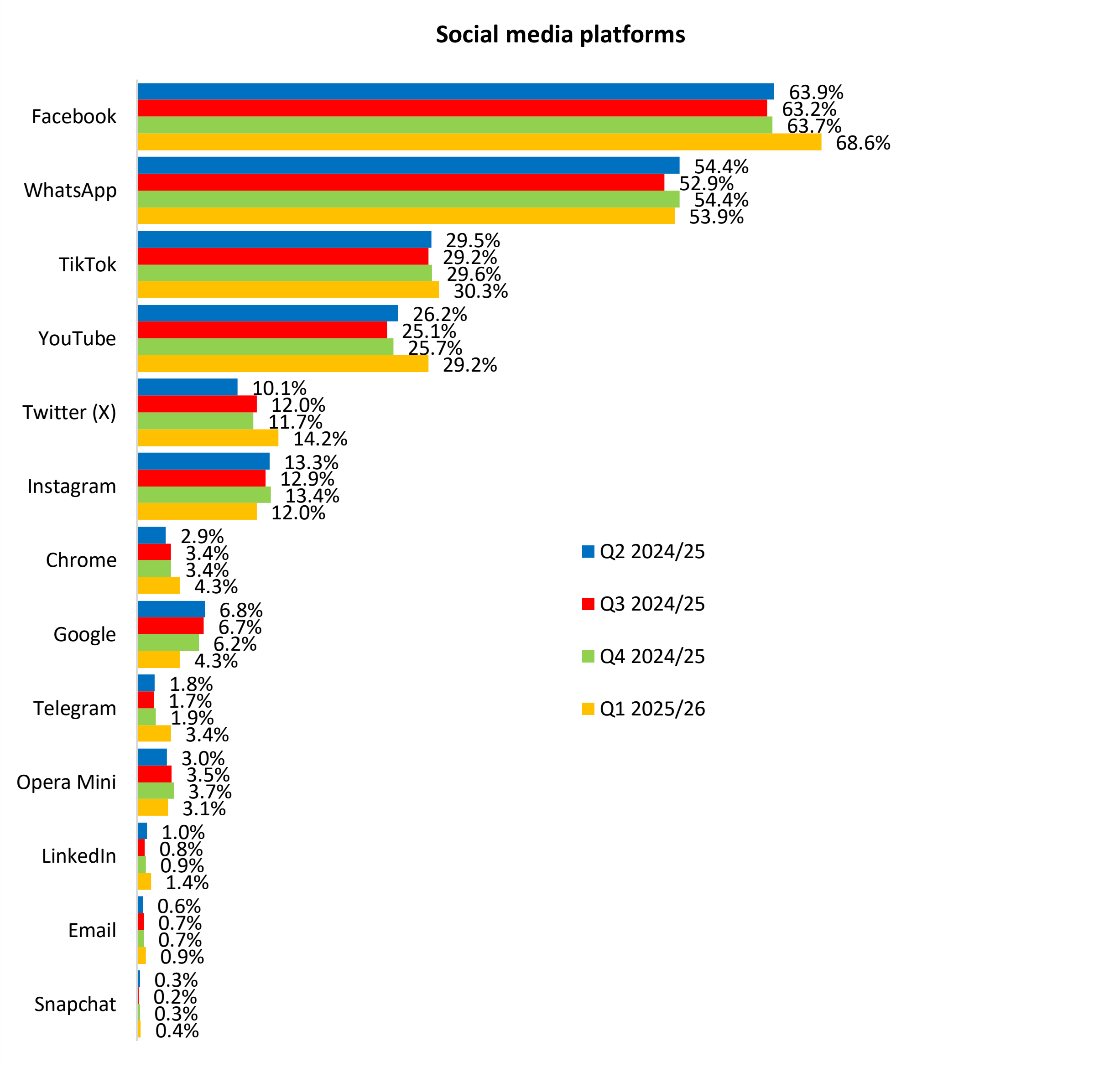
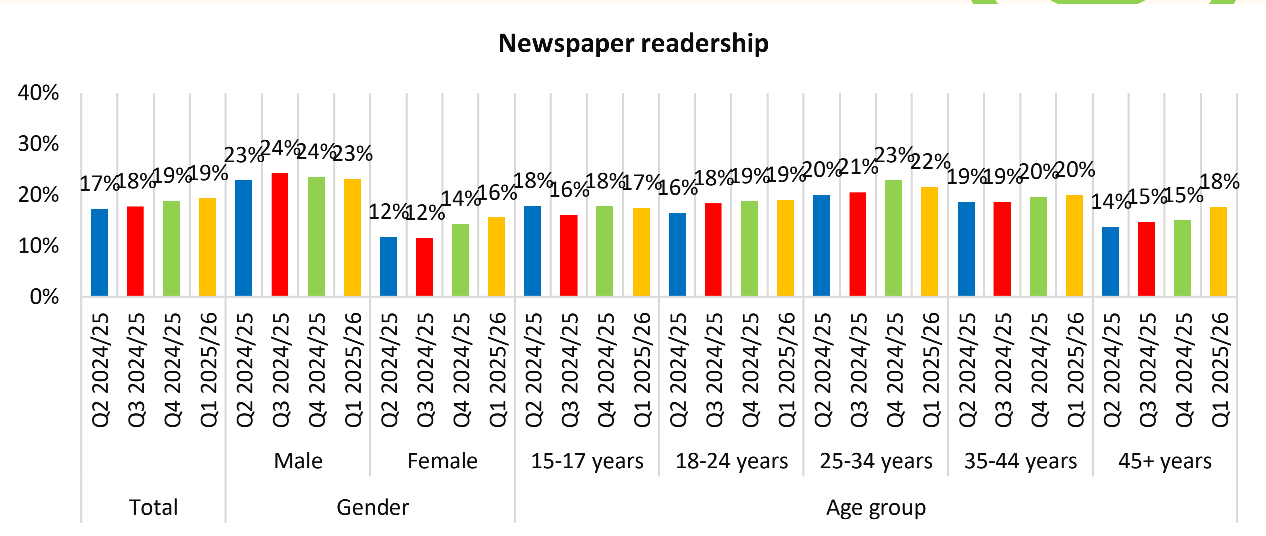


Figure 25: Popular social media platforms

6. Newspaper Readership

Newspaper readership in Kenya shows a clear gender gap, with male respondents consistently reporting higher readership levels than females across all quarters. By age, individuals aged 25–34 years emerge as the most engaged newspaper readers, consistently recording the highest readership rates among all age groups. Readership is relatively lower among the youngest (15–17 years) and oldest (45+ years) demographics, indicating that print media continues to resonate most with young to mid-career adults.

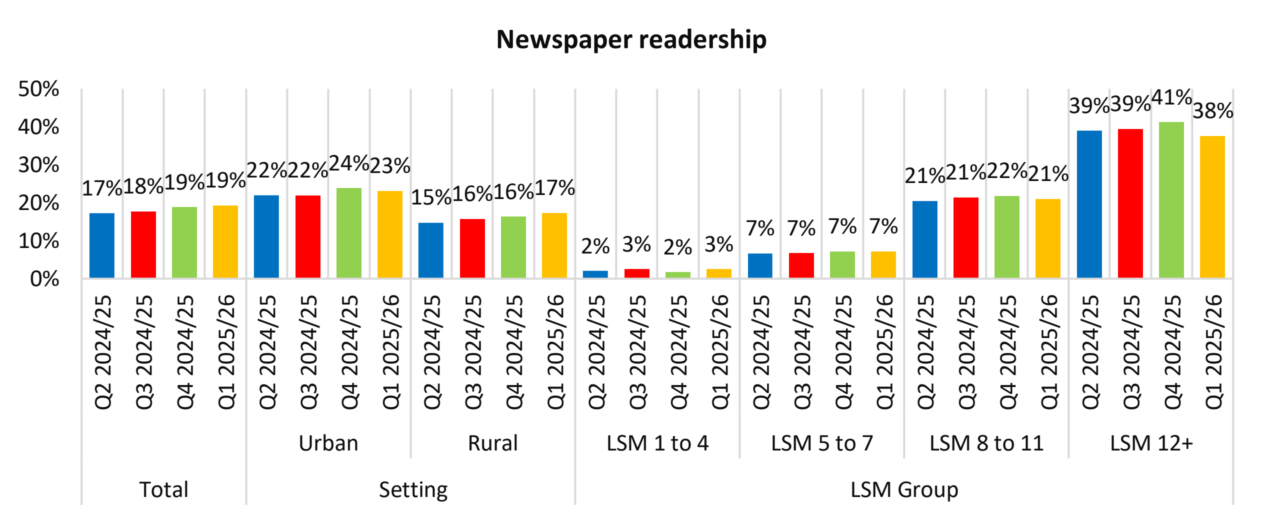


n=32.2M: All Respondents

Figure 25: Newspaper readership demographics – by total, gender and age

Newspaper readership in Kenya is significantly higher in urban areas compared to rural regions. Urban dwellers consistently show greater engagement with print media, reflecting better access to distribution channels and higher literacy levels.

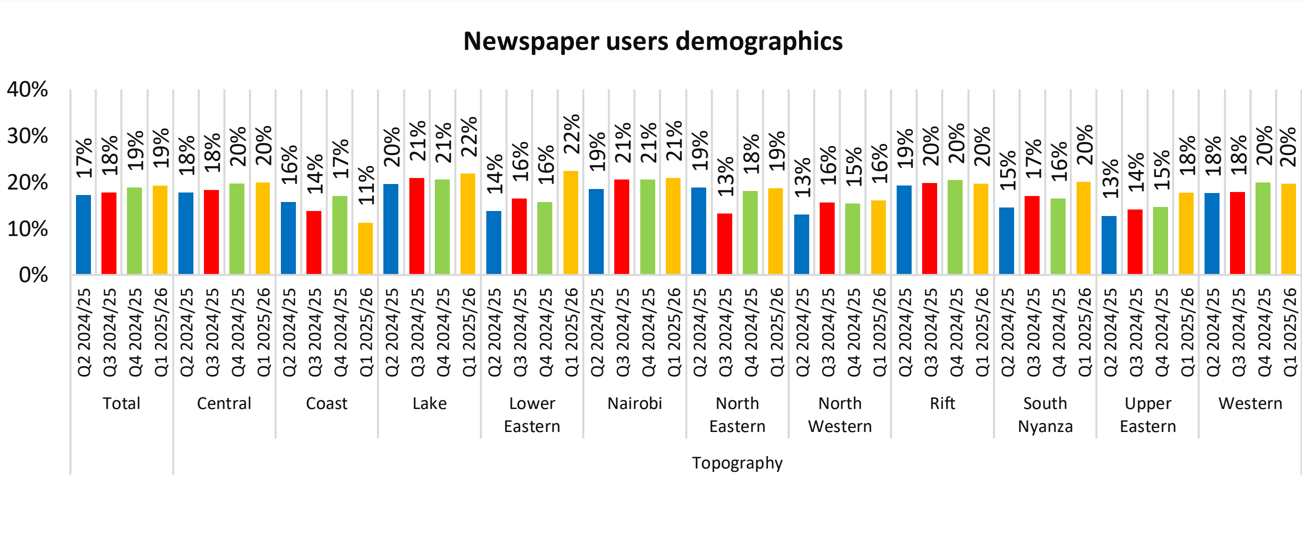
Additionally, readership strongly correlates with socioeconomic status, with the highest incidence recorded among individuals in the LSM 12+ group, where 38% (Q1 2025/26) report reading newspapers regularly. In contrast, readership remains minimal among lower LSM groups (1 to 4).



n=32.2M: All Respondents

Figure 26: Newspaper readership demographics – by total, setting and LSM

In Q1 2025/26, newspaper readership remained highest in the Lake and Lower Easter regions, each recording a stable incidence of 22% and 21%. These topographies continue to demonstrate stronger engagement with print media compared to other regions. The Coast region, which had experienced a decline from 17% in Q4 to 11% in Q1 2025/26.



n=32.2M: All Respondents

Figure 27: Newspaper readership demographics – by total and topography

7. Advertising Expenditure

7.1. Advertising Expenditure Overview

Overall industry spending increased by +15% in Q1 2025/26. The industry's total spending increased from 15B to Kes 18B between Q4 2024/25 and Q1 2025/26.

Table 7: Advertising Expenditure

Sectors	Q2 2024/25	Q3 2024/25	Q4 2024/25	Q1 2025/26	CHANGE (Q1-Q4)
Financial Services	2,136	2,069	2,320	2,634	14%
Media	3,031	2,479	2,099	1,838	-12%
Corporate & Multi-brand	1,670	1,304	1,495	1,017	-32%
Personal Care	1,160	793	1,213	1,142	-6%
Betting & Gaming	1,738	2,191	1,185	131	-89%
Communications	1,343	1,169	991	2,221	124%
Property & Building & Acc.	864	850	850	1,215	43%
Foods	1,663	789	808	1,192	48%
Retail	2,232	1,119	799	623	-22%
Tourism & Entertainment	953	1,276	772	1,764	128%
Veterinary & Agriculture	697	355	751	188	-75%
Publishing & Education	496	718	698	1,373	97%
Beverage	822	382	582	693	19%
Transport	360	176	558	1,239	122%

Pharmaceuticals	537	339	424	407	-4%
Household	486	322	256	344	34%
Clothing, Fabrics & Footwear	89	45	97	56	-42%
Office Equipment & Supplies	27	20	40	255	537%
Total	**20,303**	**16,396**	**15,939**	**18,331**	**15%**

Key: Figures in KES Millions (000,000)

TV has the greatest spending, with radio coming in second. On TV Communications has highest spending while Financial Services on TV. Corporate & Multibrand have the highest spending in print.

Table 8: Advertising Expenditure for radio, TV & print

SECTOR	TV	Radio	Print	Total	Share of Spending (SOS)
Financial Services	1,204	1,289	141	2,634	14.4%
Communications	1,559	654	8	2,221	12.1%
Media	1,057	410	372	1,838	10.0%
Tourism & Entertainment	1,211	428	125	1,764	9.6%
Publishing & Education	714	430	229	1,373	7.5%
Transport	495	727	17	1,239	6.8%
Property & Building & Acc.	950	242	23	1,215	6.6%
Foods	781	409	2	1,192	6.5%
Personal Care	983	159	0	1,142	6.2%
Corporate & Multibrand	280	317	420	1,017	5.5%
Beverage	201	487	5	693	3.8%
Retail	347	104	172	623	3.4%
Pharmaceuticals	222	167	18	407	2.2%
Household	222	115	7	344	1.9%
Office Equipment & Supplies	131	123	1	255	1.4%
Veterinary & Agriculture	76	106	5	188	1.0%
Betting & Gaming	80	51	-	131	0.7%
Clothing, Fabrics & Footwear	53	3	-	56	0.3%
TOTAL AD SPENDS KSHS	**10,565**	**6,220**	**1,546**	**18,331**	**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 a drop by the beginning of January 2025 then a positive growth trend to 7% by end of March 2025 but a drop in June 2025. A growth is observed between July and August 2025 but a drop in September 2025.

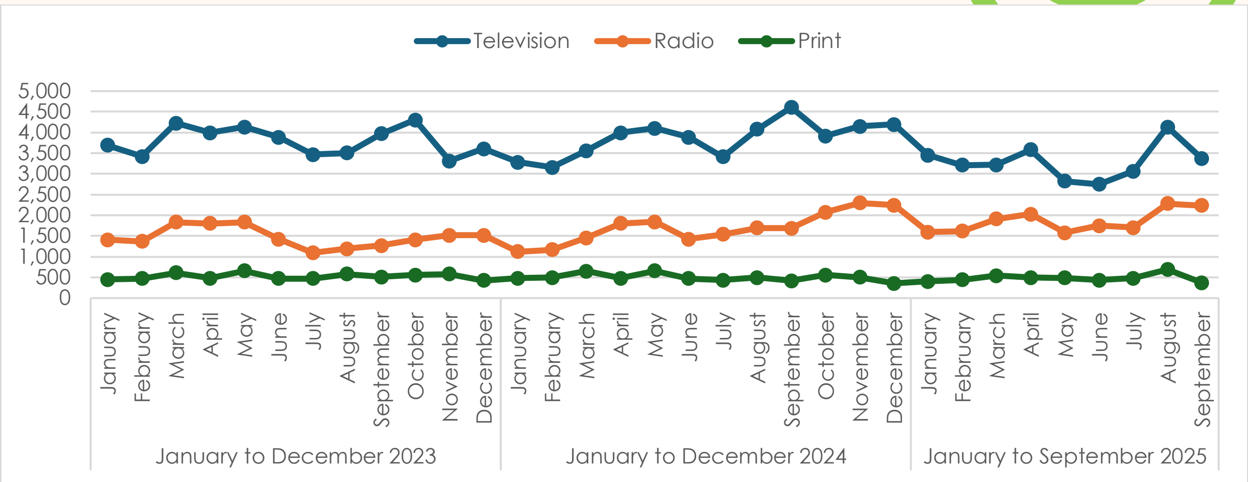


Figure 28: Advertising spends Jan 2023 to September 2025

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.

Table 9: Advertising spends pay TV and free to air TV

Quarter	Month	FTA TV	Pay TV
Q1 2024/25	July	3,384	28
	August	4,061	20
	September	4,596	11
Q2 2024/25	October	3,919	3
	November	4,150	2
	December	4,193	2
Q3 2024/25	January	3,442	8
	February	3,210	3
	March	3,209	11
Q4 2024/25	April	3,576	5
	May	2,817	6
	June	2,745	3
Q1 2025/26	July	3,061	1
	August	4,132	1
	September	3,371	-

Key: Figures in KES Millions (000,000)

7.4. TV Spends by Sector/Industry

In Q1 2025/26, television advertising was led by the Communications sector, which invested KSH 1.56 billion. Following closely were the Tourism & Entertainment and Financial Services sectors, each spending over KSH 1.2 billion. Additionally, the Media, Personal Care, and Property sectors allocated over KSH 950 million each to TV ads.

Key points include the dominance of Communications, leveraging TV's broad and visual appeal, the strategic use by Tourism & Financial Services for extensive audience reach, and the acknowledgment of TV's essential role by diverse industries such as Media and Foods. These trends underscore television's vast reach and pivotal role in enhancing consumer engagement strategies.

Table 10: TV spends by sector/industry

Sector/ Industry	Q2 2024/25	Q3 2024/25	Q4 2024/25	Q1 2025/26
Communications	770	820	709	1,559
Tourism & Entertainment	685	936	629	1,211
Financial Services	992	864	988	1,204
Media	1,687	1,552	1,193	1,057
Personal Care	1,045	718	1,082	983
Property & Building & Acc.	704	702	631	950
Foods	1,220	580	495	781
Publishing & Education	336	490	432	714
Transport	109	74	207	495
Retail	1,443	609	567	347
Corporate & Multibrand	727	496	409	280
Pharmaceuticals	414	289	287	222
Household	284	224	155	222
Beverage	375	155	145	201
Office Equipment & Supplies	24	4	13	131
Betting & Gaming	1,150	1,302	796	80
Veterinary & Agriculture	237	48	370	76
Clothing, Fabrics & Footwear	60	20	43	53

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 Transport and Communication in Q1 2025/26.

Table 11: Radio spends by sector/industry

Sector	Q2 2024/25	Q3 2024/25	Q4 2024/25	Q1 2025/26
Financial Services	378	1014	1134	1289
Transport	43	43	125	727
Communications	213	303	375	654

Beverage	139	208	307	487
Publishing & Education	54	122	200	430
Tourism & Entertainment	598	490	226	428
Media	375	564	499	410
Foods	298	348	279	409
Corporate & Multibrand	259	887	330	317
Property & Building & Acc.	13	177	180	242
Pharmaceuticals	71	92	93	167
Personal Care	71	190	122	159
Office Equipment's & Supplies	1	8	23	123
Household	100	73	131	115
Veterinary & Agriculture	44	75	333	106
Retail	243	222	436	104
Betting & Gaming	89	284	513	51
Clothing, Fabrics & Footwear	7	23	54	3

Key: Figures in KES Millions (000,000)

7.6. Print Spends by Sector/Industry

The highest spends distribution is on media and corporate & multi-brand Q1 2025/26.

Table 12: Print spends by sector/industry

SECTOR	Q2 2024/25	Q3 2024/25	Q4 2024/25	Q1 2025/26
Media	399	363	407	178
Corporate & Multibrand	604	524	574	167
Tourism & Entertainment	48	151	21	37
Financial Services	169	192	198	28
Publishing & Education	51	51	86	25
Pharmaceuticals	8	7	12	16
Property & Building & Acc.	37	26	19	6
Communications	7	1	3	6
Household	10	6	8	5
Veterinary & Agriculture	2	5	5	3
Retail	25	20	5	3
Transport	48	27	18	3
Beverage	6	4	1	1
Office Equipment & Supplies	0	7	3	1
Foods	1	1	6	0
Clothing, Fabrics & Footwear	5	1	0	0
Betting & Gaming	4	1	60	

Key: Figures in KES Millions (000,000)

7.7. Overall Digital Spends Trends

In Q1 2025/26, An estimated of KES 11.76B was spend on digital space. Which signifies the digital shifts by Kenyan brands. September was among top invested month by Banking & Finance sector.

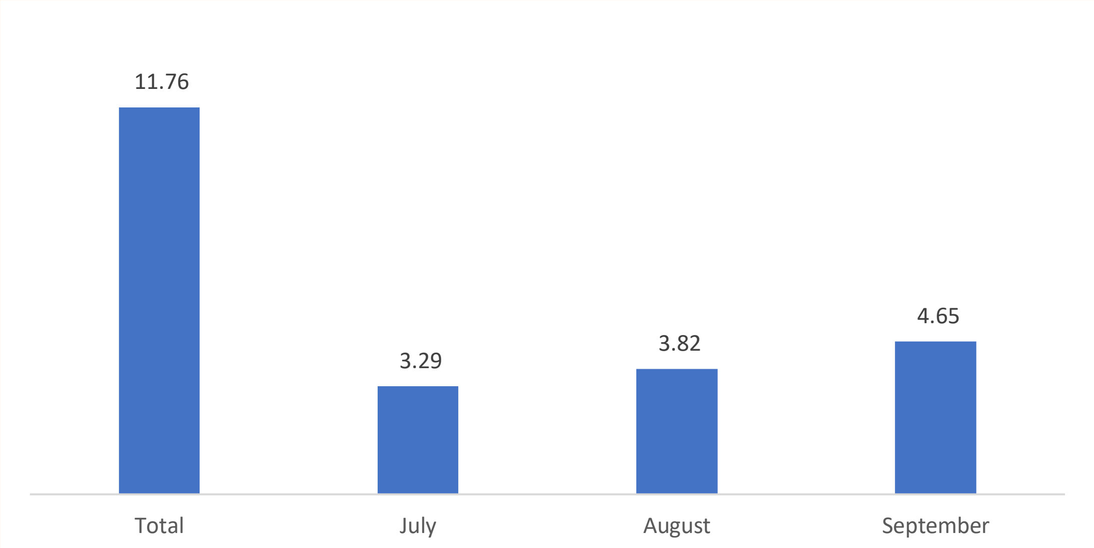


Figure 29: Overall Digital Spends Trends

7.8. Top Digital Channels

Meta platforms holds 79% of digital investment making them top preferred digital channels by most brands. Only 9% of digital spends was invested by programmatic displays Ads with Google Display Networks (GDN) as preferred Ad server.

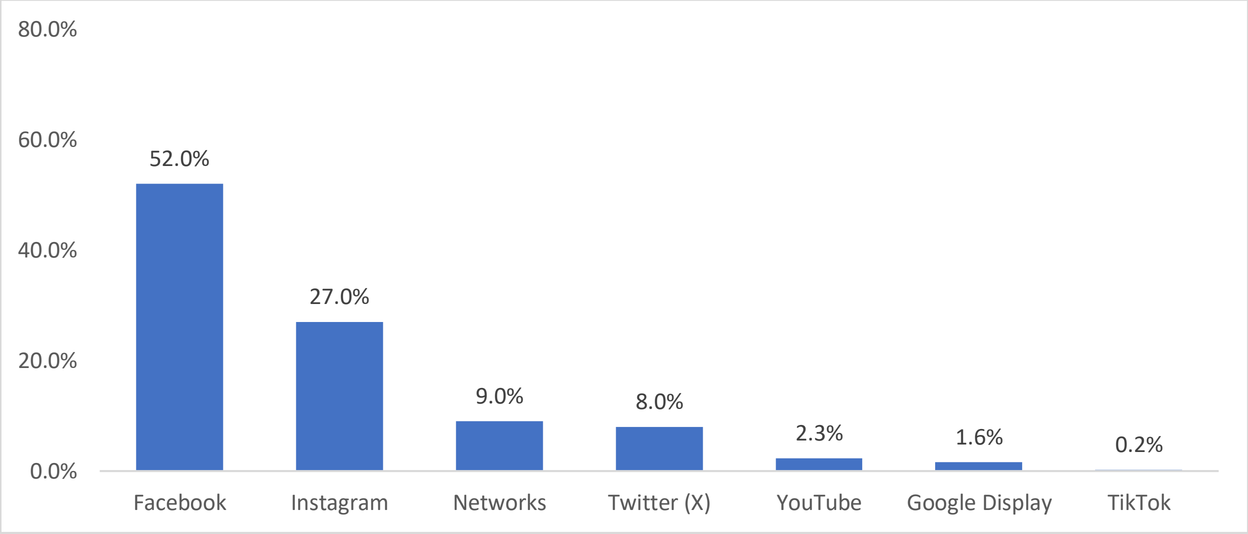


Figure 30: Top Digital Channels

8. CHALLENGES AND OPPORTUNITIES FOR THE BROADCASTING INDUSTRY IN KENYA

Challenges in the Broadcasting Industry in Kenya

❖ Shifting Consumption to Digital Platforms

- The report shows increasing internet and social media use (60%), with younger audiences (15–34) preferring online streaming, YouTube, TikTok, and on-demand content over traditional TV and radio.
- This shift has reduced time spent on traditional broadcast media, particularly among the urban middle class.
- Broadcasters risk losing youth engagement unless they actively integrate digital extensions—such as podcasts, live streaming, and interactive social content into their programming mix.

❖ Advertising Revenue Concentration and Decline for Smaller Players

- While total ad spends increased (+15%), most revenue is captured by a few dominant groups notably Royal Media Services (RMS) with over KSh 8.5 billion in spend.
- Smaller or regional stations struggle to attract national advertisers and often depend on local SME advertising, which remains inconsistent.
- High production and airtime costs, coupled with delayed payments from advertisers and agencies, limit operational sustainability.
- The growing shift to digital platforms has further fragmented the ad market, with advertisers diverting budgets to social media and programmatic networks where targeting is more efficient.

❖ Measurement and Monetization Gaps

- Although the audience measurement system is improving, some advertisers still question transparency and comparability across platforms (radio, TV, online).
- Pay TV viewership remains low (0.47 M vs 19.5 M FTA viewers), limiting monetization for premium broadcasters.

❖ Emerging Dynamics in Digital Advertising

- The heavy reliance on Meta platforms exposes advertisers to algorithmic volatility and data privacy risks, while limiting innovation in local ad tech solutions.
- Broadcasters transitioning online face challenges in content monetization due to limited local digital inventory, low CPM rates, and dependence on foreign-owned platforms.
- There is growing demand for integrated ad measurement frameworks that combine broadcast, digital, and influencer marketing performance into unified audience insights.

Opportunities in the Broadcasting Industry in Kenya

❖ **Growing Digital and Online Audience Base**

- Expanding internet access and smartphone penetration offer broadcasters a large potential for online radio, live streaming, and hybrid digital-broadcast models.
- Broadcasters can extend reach through YouTube channels, TikTok snippets, and on-demand podcast versions of radio and TV shows.
- The 52% dominance of Facebook and 27% share of Instagram in digital ad spends also creates space for broadcasters to monetize their digital presence through branded collaborations, sponsored content, and influencer partnerships.

❖ **Youth-Driven Content Demand**

- Youth aged 15–34 form the largest and most dynamic segment of media consumers.
- Opportunities exist in developing youth-centric, entertainment-driven, and interactive programs on both traditional and digital platforms especially music, lifestyle, comedy, and social issues.
- Partnerships with local artists, content creators, and influencers can help broadcasters bridge the gap between traditional media and social trends, positioning them as part of youth culture rather than outside it.
- Broadcasters can further benefit by adopting cross-platform campaign models, where advertisers sponsor both on-air and online experiences (e.g., live concerts, talent searches, digital challenges).

❖ **Regional and Vernacular Market Strength**

- Vernacular radio remains highly trusted and deeply embedded at community level, especially in Central, Eastern, and Lake regions.
- Broadcasters can expand local content production, community news, and culturally tailored advertising to strengthen brand loyalty.
- The growing number of county governments and local SMEs provides opportunities for localized advertising revenue.