

## **AUDIENCE MEASUREMENT AND INDUSTRY TRENDS REPORT**

**July 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 more than 200 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

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.

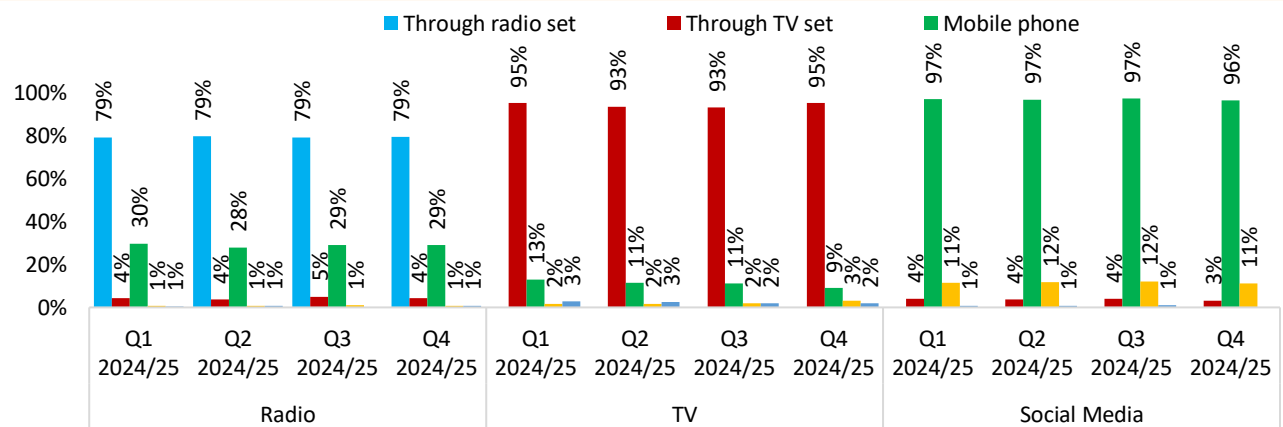


Figure 1: Ways in which media is consumed by total

### 2.2. Place of Media Consumption

Media consumption patterns by place of consumption remained largely consistent across all four quarters of 2024/25. The home continues to be the primary setting for engaging with media, with radio slightly outperforming television 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			
	Q1 2024/25	Q2 2024/25	Q3 2024/25	Q4 2024/25	Q1 2024/25	Q2 2024/25	Q3 2024/25	Q4 2024/25	Q1 2024/25	Q2 2024/25	Q3 2024/25	Q4 2024/25
At own home	90%	89%	90%	90%	87%	87%	88%	87%	86%	86%	86%	86%
Place of work	3%	4%	4%	4%	4%	3%	3%	3%	4%	4%	4%	4%
Bar/Restaurant/Hotel	2%	2%	2%	2%	2%	2%	3%	3%	6%	7%	7%	7%
Someone else's household	2%	3%	3%	3%	2%	2%	2%	2%	3%	3%	3%	3%
Bus/Taxi/Matatu	1%	1%	1%	1%	2%	2%	2%	2%	0%	0%	1%	0%
In car - Private	1%	1%	1%	1%	2%	2%	2%	2%	0%	0%	1%	0%
On the move	1%	0%	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 (Q1-Q4 2024/25) has shown notable consistency. Radio and television remain the most widely accessed media, each maintaining stable reach across all quarters where radio fluctuating narrowly between 74-75% and television between 74-76%. Internet access also remained steady, with usage holding at 56-57% throughout the year.

Notably, newspaper readership saw a modest uptick in Q4 (19%) compared to Q2 (17%), suggesting a slight rebound after stagnation. Magazine access, while the least consumed medium, remained consistently low at 7-8%, showing no significant shifts.

#### Access and Usage in the last 7 days

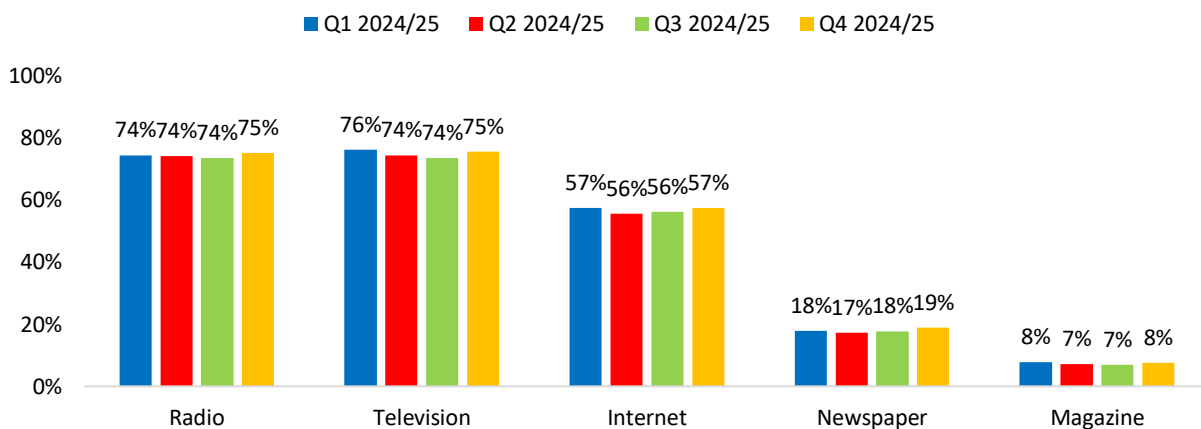


Figure 2: Access and Usage of media by total

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.

### Activities Engaged in Last 7 Days

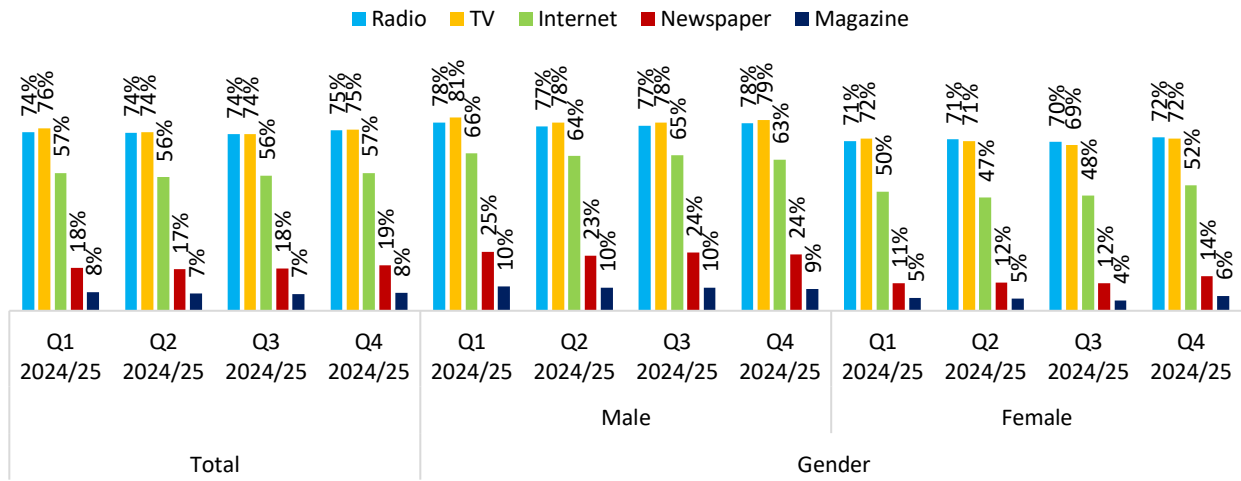


Figure 3: Activities Engaged in Last 7 Days - by total & gender

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		Q1 2024/25	74%	76%	57%	18%	8%
		Q2 2024/25	74%	74%	56%	17%	7%
		Q3 2024/25	74%	74%	56%	18%	7%
		Q4 2024/25	75%	75%	57%	19%	8%
LSM Group	LSM 1 to 4	Q1 2024/25	91%	26%	5%	2%	1%
		Q2 2024/25	90%	26%	8%	2%	1%
		Q3 2024/25	90%	24%	8%	3%	1%
		Q4 2024/25	90%	28%	8%	2%	1%
	LSM 5 to 7	Q1 2024/25	74%	70%	28%	6%	1%
		Q2 2024/25	74%	69%	29%	7%	2%
		Q3 2024/25	74%	69%	28%	7%	2%
		Q4 2024/25	75%	68%	29%	7%	2%
	LSM 8 to 11	Q1 2024/25	72%	86%	74%	21%	9%
		Q2 2024/25	71%	86%	74%	21%	8%

LSM 12+	Q3 2024/25	71%	85%	75%	21%	8%
	Q4 2024/25	73%	86%	74%	22%	8%
	Q1 2024/25	71%	94%	92%	39%	20%
	Q2 2024/25	70%	92%	92%	39%	20%
	Q3 2024/25	68%	92%	92%	39%	17%
	Q4 2024/25	70%	93%	92%	41%	20%

In Q4 2024/25, radio was the most accessed medium nationally at 75%, with the highest regional figures recorded in Lower Eastern (86%), Western (84%), and South Nyanza (84%). Television viewership peaked in Nairobi (85%) Upper Eastern (79%) and Rift (75%) and driven by better infrastructure and access. Internet access remained highest in North Eastern at 84%, followed by Nairobi at 80% reflecting continued growth in digital engagement. Newspaper readership reached its highest levels in Lake (21%), Nairobi (21%), Rift (20%), and Western (20%), while magazine readership remained low overall, with only Lake (10%), North Eastern (10%), Rift (8%), and Central (9%) showing slightly elevated levels.

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

	Quarter	Radio	TV	Internet	Newspaper	Magazine
<b>Total</b>	Q1 2024/25	74%	76%	57%	18%	8%
	Q2 2024/25	74%	74%	56%	17%	7%
	Q3 2024/25	74%	74%	56%	18%	7%
	Q4 2024/25	75%	75%	57%	19%	8%
<b>Central</b>	Q1 2024/25	75%	85%	54%	18%	8%
	Q2 2024/25	73%	83%	52%	18%	7%
	Q3 2024/25	74%	81%	55%	18%	6%
	Q4 2024/25	70%	71%	54%	17%	9%
<b>Coast</b>	Q1 2024/25	66%	72%	56%	18%	9%
	Q2 2024/25	67%	69%	54%	16%	8%
	Q3 2024/25	67%	67%	54%	14%	7%
	Q4 2024/25	70%	71%	54%	17%	9%
<b>Lake</b>	Q1 2024/25	76%	75%	58%	22%	10%
	Q2 2024/25	81%	75%	51%	20%	9%
	Q3 2024/25	81%	74%	52%	21%	9%
	Q4 2024/25	81%	76%	52%	21%	10%
<b>Lower Eastern</b>	Q1 2024/25	85%	70%	51%	13%	8%
	Q2 2024/25	87%	68%	50%	14%	8%
	Q3 2024/25	82%	71%	50%	16%	8%
	Q4 2024/25	86%	69%	52%	16%	8%
<b>Nairobi</b>	Q1 2024/25	65%	85%	79%	20%	6%
	Q2 2024/25	62%	82%	79%	19%	7%
	Q3 2024/25	62%	83%	77%	21%	6%
	Q4 2024/25	64%	85%	80%	21%	8%

North Eastern	Q1 2024/25	46%	67%	81%	14%	9%
	Q2 2024/25	43%	66%	83%	19%	13%
	Q3 2024/25	39%	66%	80%	13%	8%
	Q4 2024/25	45%	69%	84%	18%	10%
North Western	Q1 2024/25	54%	75%	57%	14%	3%
	Q2 2024/25	55%	72%	55%	13%	3%
	Q3 2024/25	57%	70%	58%	16%	6%
	Q4 2024/25	53%	73%	60%	15%	4%
Rift	Q1 2024/25	79%	80%	57%	22%	10%
	Q2 2024/25	80%	75%	53%	19%	8%
	Q3 2024/25	81%	71%	53%	20%	9%
	Q4 2024/25	81%	75%	55%	20%	8%
South Nyanza	Q1 2024/25	88%	60%	50%	14%	8%
	Q2 2024/25	82%	62%	49%	15%	6%
	Q3 2024/25	80%	64%	46%	17%	6%
	Q4 2024/25	84%	63%	50%	16%	7%
Upper Eastern	Q1 2024/25	80%	77%	55%	14%	8%
	Q2 2024/25	78%	79%	56%	13%	6%
	Q3 2024/25	78%	77%	57%	14%	6%
	Q4 2024/25	78%	79%	58%	15%	5%
Western	Q1 2024/25	83%	67%	48%	18%	5%
	Q2 2024/25	83%	67%	48%	18%	6%
	Q3 2024/25	82%	67%	48%	18%	6%
	Q4 2024/25	84%	68%	50%	20%	6%

#### 2.4. Number of Media Consumed

In Q4 2024/25, the share of individuals consuming only one media platform dropped slightly to 25%, reversing the gradual upward trend observed in previous quarters (28.8% in Q3, 27.0% in Q2, and 25.2% in Q1).

Consumption of two media platforms remained relatively stable at 35%, consistent with the pattern seen across the year (35.2% in Q1, 35.1% in Q2, and 36.9% in Q3), highlighting continued moderate cross-platform behavior.

Notably, multiple media consumption (three or more platforms) rose to its highest point in the year at 40%, rebounding from the decline seen in Q3 (34.3%) and Q2 (38.0%), and surpassing even Q1 (39.6%).

### Number of media consumed

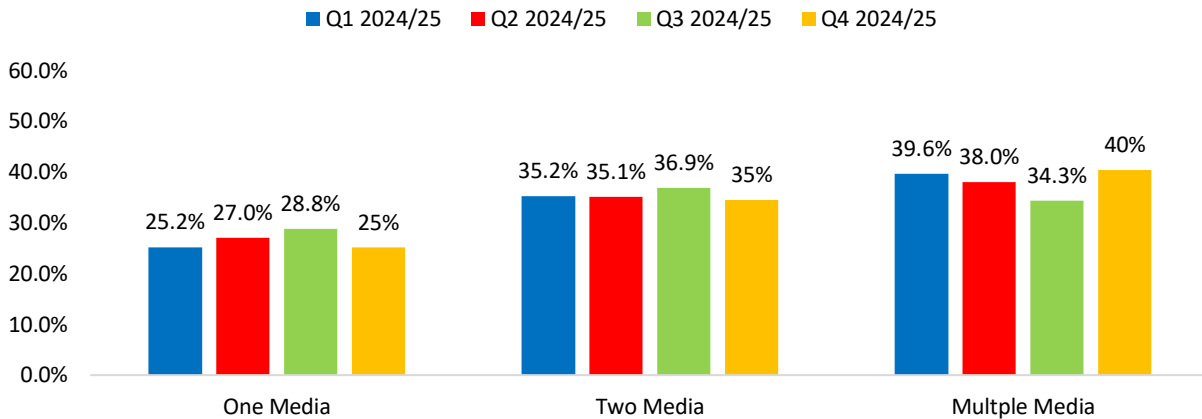


Figure 4: Number of media consumed by total

### 2.5. Type of Media Consumed

Across the four quarters of 2024/25, 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. Similarly, the combination of radio and TV remained steadily popular, though slightly declined in Q4 to 17.1%. All Media consumption spanning radio, TV, online, and print also rebounded to 13.7% in Q4 after dipping sharply in Q3. Radio-only users accounted for 14.4% in Q4, 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	Q1 2024/25	Q2 2024/25	Q3 2024/25	Q4 2024/25
Radio+TV+Online	21.20%	20.70%	28.10%	21.40%
Radio+TV	17.70%	17.50%	18.90%	17.10%
Radio Only	14.20%	15.40%	16.00%	14.40%
All Media	13.70%	12.40%	4.70%	13.70%
TV+Online	12.20%	11.70%	12.90%	11.50%
TV Only	6.80%	7.30%	7.60%	6.50%
Online Only	4.10%	4.20%	5.00%	4.00%
Radio+Online	3.50%	4.00%	4.60%	4.00%
Radio+TV+Print	2.80%	3.10%	0.90%	3.30%
TV+Print+Online	1.40%	1.40%	0.50%	1.50%
Print+Online	0.80%	0.90%	0.30%	0.80%
Radio+Print	0.60%	0.60%	0.20%	0.70%
Radio+Print+Online	0.60%	0.50%	0.20%	0.50%

TV+Print	0.40%	0.40%	0.10%	0.40%
Print Only	0.10%	0.10%	0.00%	0.10%

## 2.6. Frequency of Media Consumption

In Q4 2024/25, 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.

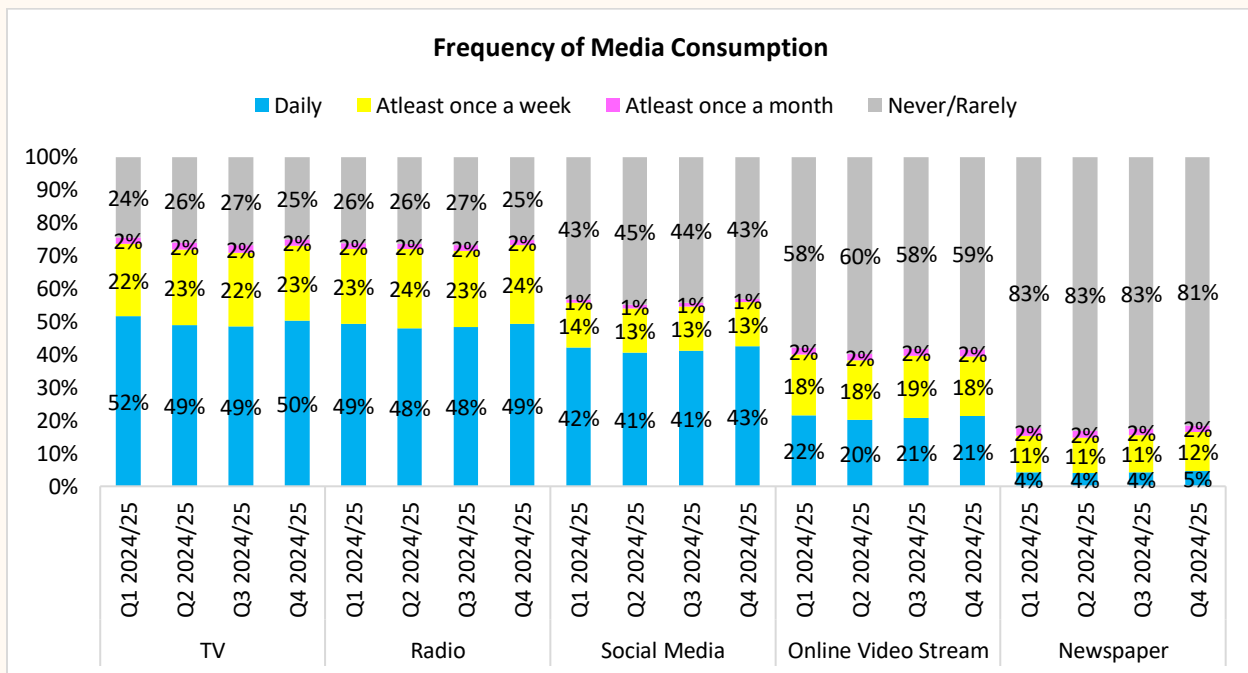


Figure 5: Frequency of consuming tv, radio, social media, online streams and newspapers

## 2.7. Demographics of Media Consumers Profiles

In Q4 2024/25, 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=24.6M	TV Viewers, n=24.7M	Newspaper Readership, n=6.1M	Online Usage, n=18.8M
Gender	Male	Q1 2024/25	52%	52%	68%	56%
		Q2 2024/25	51%	52%	66%	57%
		Q3 2024/25	52%	52%	67%	57%
		Q4 2024/25	51%	52%	62%	54%
	Female	Q1 2024/25	48%	48%	33%	44%
		Q2 2024/25	49%	48%	35%	43%
		Q3 2024/25	48%	48%	33%	43%
		Q4 2024/25	49%	48%	39%	46%
Age group	15-17 years	Q1 2024/25	11%	11%	12%	14%
		Q2 2024/25	11%	11%	12%	15%
		Q3 2024/25	11%	11%	10%	14%
		Q4 2024/25	10%	11%	11%	15%
	18-24 years	Q1 2024/25	20%	24%	19%	27%
		Q2 2024/25	20%	23%	21%	27%
		Q3 2024/25	20%	22%	22%	27%
		Q4 2024/25	20%	23%	22%	27%
	25-34 years	Q1 2024/25	23%	26%	30%	31%
		Q2 2024/25	23%	25%	29%	31%
		Q3 2024/25	23%	26%	28%	30%
		Q4 2024/25	24%	25%	30%	30%
	35-44 years	Q1 2024/25	19%	17%	19%	16%
		Q2 2024/25	19%	18%	19%	16%
		Q3 2024/25	19%	18%	18%	16%
		Q4 2024/25	19%	18%	18%	16%
	45+ years	Q1 2024/25	28%	23%	20%	12%
		Q2 2024/25	28%	23%	20%	12%
		Q3 2024/25	27%	23%	21%	13%
		Q4 2024/25	27%	23%	20%	13%
Setting	Urban	Q1 2024/25	28%	35%	40%	41%
		Q2 2024/25	28%	35%	42%	43%
		Q3 2024/25	28%	36%	41%	43%
		Q4 2024/25	28%	36%	42%	42%
	Rural	Q1 2024/25	72%	65%	60%	59%
		Q2 2024/25	72%	65%	58%	57%
		Q3 2024/25	72%	64%	59%	57%

		Q4 2024/25	72%	65%	58%	58%
LSM Group	LSM 1 to 4	Q1 2024/25	15%	4%	2%	1%
		Q2 2024/25	17%	5%	2%	2%
		Q3 2024/25	17%	4%	2%	2%
		Q4 2024/25	15%	5%	1%	2%
	LSM 5 to 7	Q1 2024/25	25%	23%	8%	12%
		Q2 2024/25	26%	25%	10%	14%
		Q3 2024/25	27%	25%	10%	13%
		Q4 2024/25	26%	23%	10%	13%
	LSM 8 to 11	Q1 2024/25	45%	53%	54%	60%
		Q2 2024/25	43%	52%	53%	59%
		Q3 2024/25	42%	51%	53%	59%
		Q4 2024/25	44%	52%	53%	58%
	LSM 12+	Q1 2024/25	16%	21%	37%	27%
		Q2 2024/25	15%	19%	35%	26%
		Q3 2024/25	14%	20%	35%	26%
		Q4 2024/25	16%	21%	37%	27%

### 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 Q4 2024/25 (78%) for males compared to 72% 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 45+, with listenership reaching 83% and above across all quarters. This trend highlights radio's stronger appeal among older and male audiences.

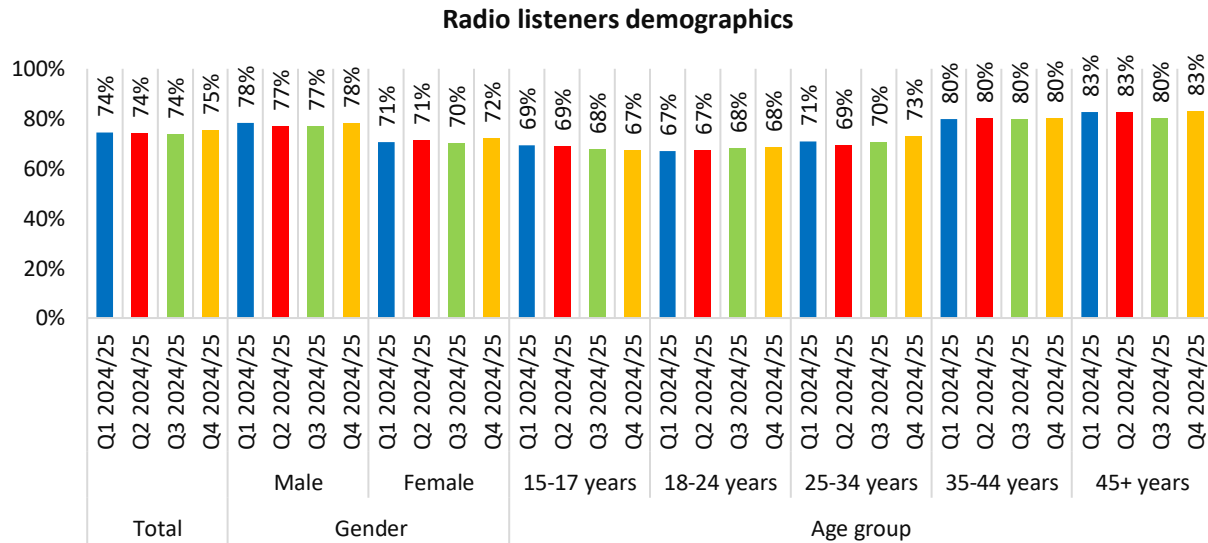


Figure 6: Demographics of radio consumers— by total, gender & age group

Radio listenership remains significantly higher in rural areas than in urban settings throughout the 2024/25 financial year, with rural audiences consistently reaching around 80%, 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 70%. These patterns reinforce radio's critical role as an accessible medium for lower-income and rural populations.

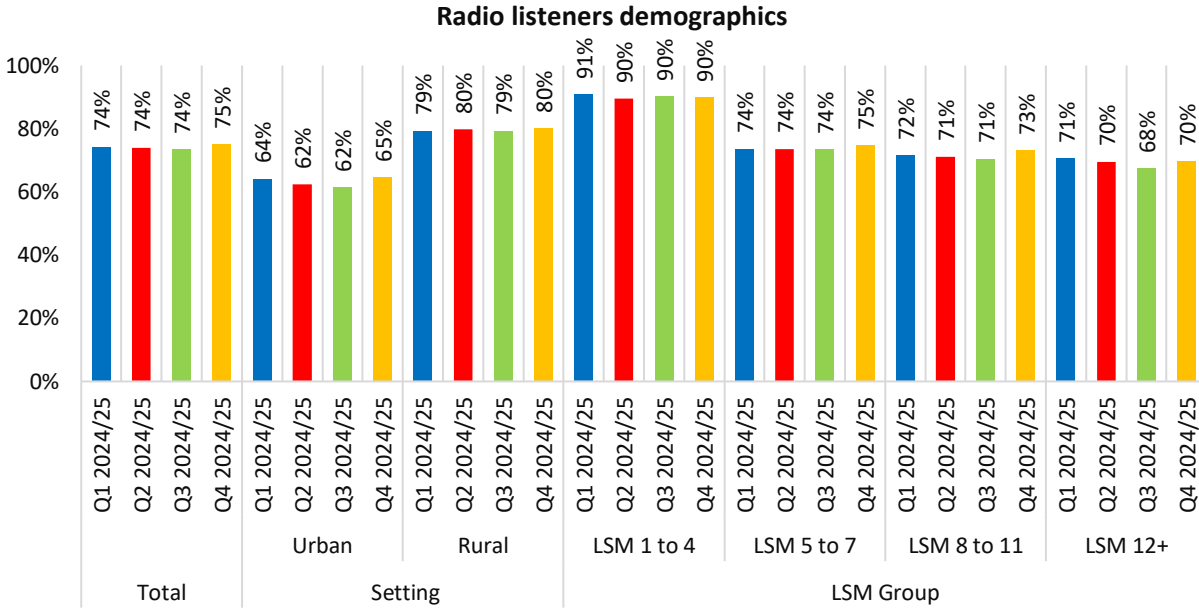


Figure 7: Demographics of radio consumers—by total, setting and LSM

In Q4 2024/25, radio listenership remained highest in Lower Eastern and Western regions, both consistently posting engagement levels above 80%. Other regions with strong radio uptake included South Nyanza, Upper Eastern, Rift, and Lake, 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 39% in Q3 before slightly rebounding to 45% in Q4. Similarly, North Western and Nairobi trailed national averages, highlighting regional disparities in radio access and usage.

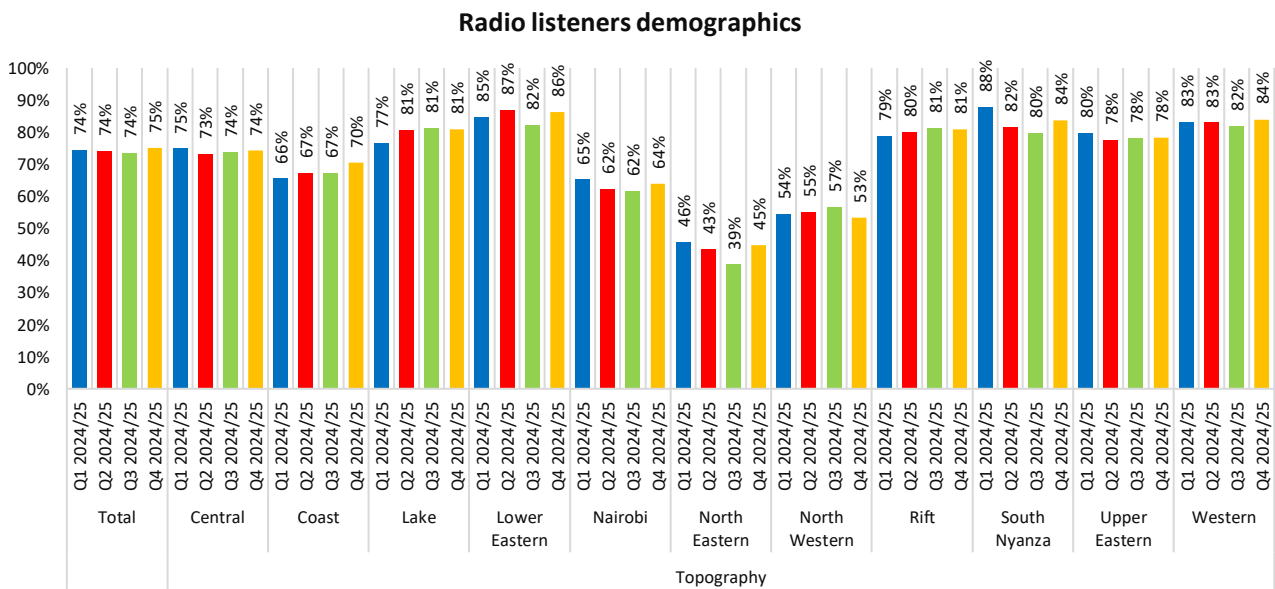


Figure 8: Demographics of radio consumers—by total, Topography

### 3.2. Radio 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 just over 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.

**Language of radio listenership by key demographics**

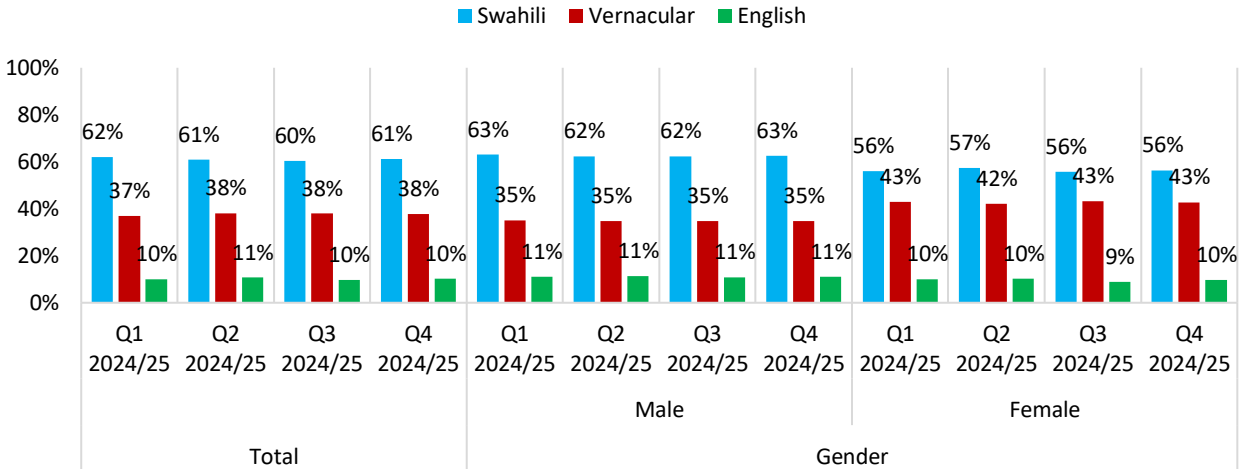


Figure 9: Radio listenership language by total and gender

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 Q1 2024/25 and Q4 2024/25.

### Language of radio listenership by key demographics

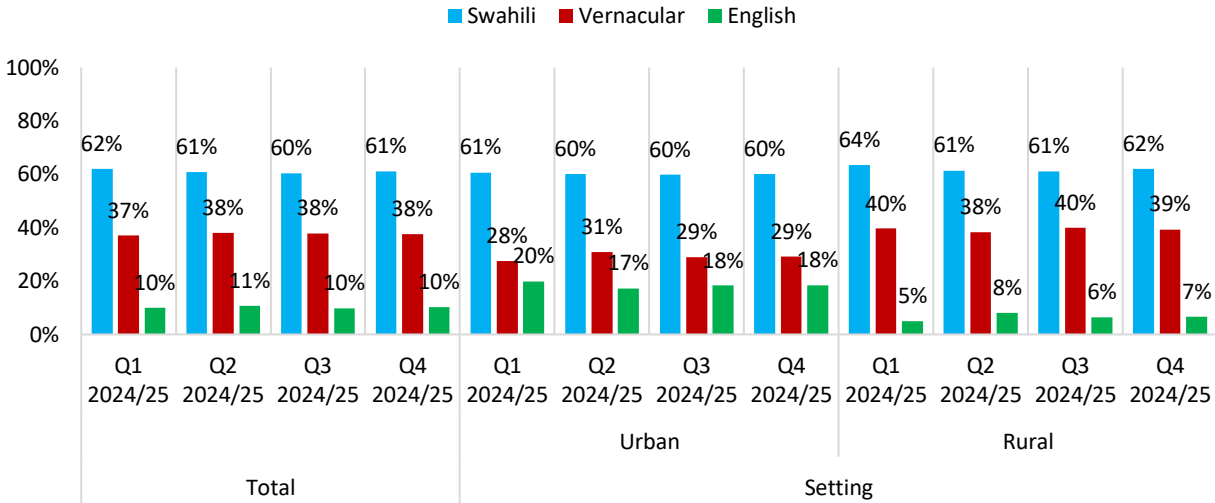


Figure 10: Radio listenership language by total & setting

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 35–42%. 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 54%) and a significant uptick in English-language consumption peaking at 18% in Q3 2024/25. This shift suggests that wealthier and more educated audiences tend to engage more with English-language stations.

### Language of radio listenership by key demographics

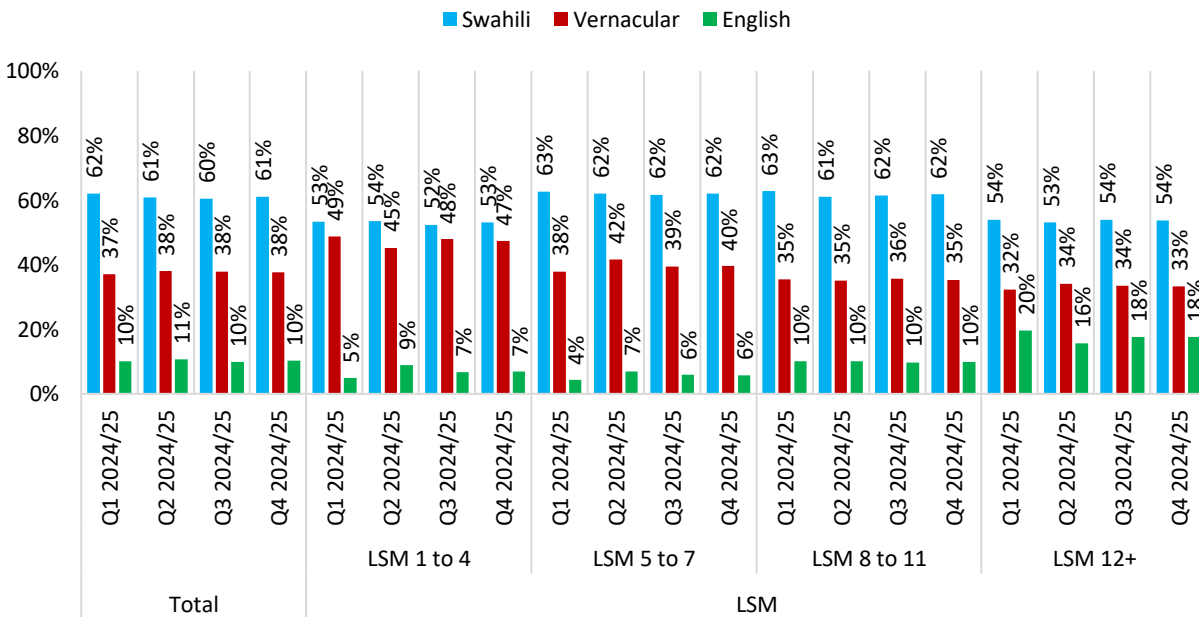


Figure 11: Radio listenership language by total & LSM

Swahili-language radio stations have the strongest following in Western and South Nyanza, where listenership consistently exceeds 85%, peaking at 91% in Western in Q1 2024/25. Similarly high Swahili preference is also seen in Nairobi and North Western. 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 23–25% share across quarters.

Table 6: Radio listenership language by total and topography

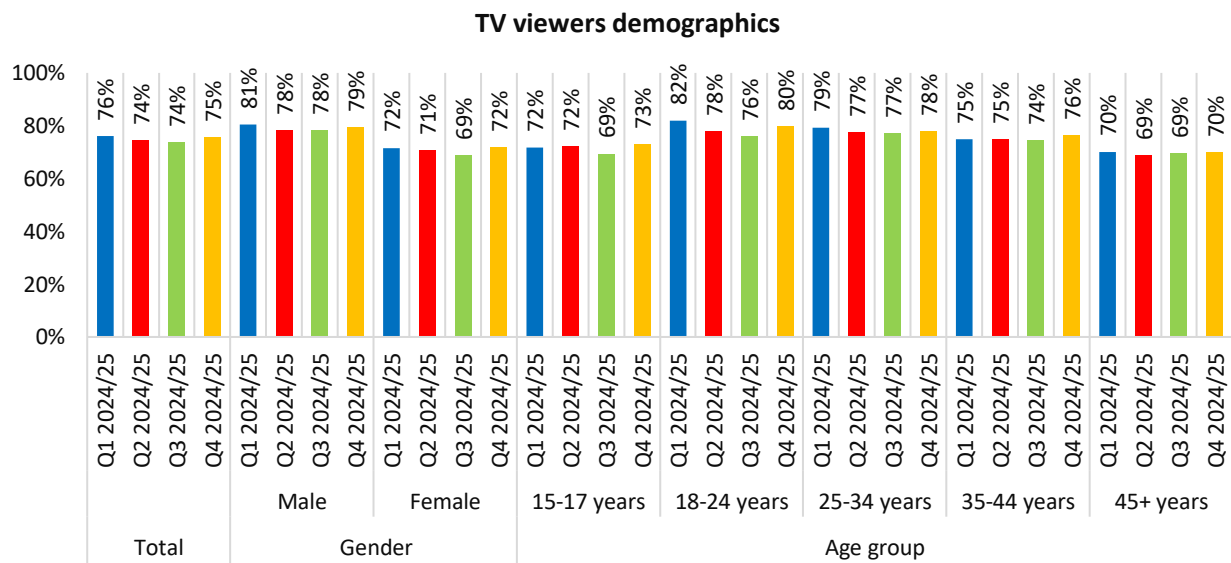
Total/ Topography		Financial Year	Radio listenership language		
			Swahili	Vernacular	English
Total		Q1 2024/25	59%	39%	9%
		Q2 2024/25	61%	38%	11%
		Q3 2024/25	60%	39%	10%
		Q4 2024/25	60%	39%	10%
Topography	Central	Q1 2024/25	43%	52%	11%
		Q2 2024/25	46%	51%	11%
		Q3 2024/25	44%	52%	10%
		Q4 2024/25	44%	52%	11%
	Coast	Q1 2024/25	61%	31%	15%
		Q2 2024/25	62%	32%	15%
		Q3 2024/25	61%	32%	15%
		Q4 2024/25	61%	31%	15%
	Lake	Q1 2024/25	47%	58%	4%
		Q2 2024/25	49%	55%	5%
		Q3 2024/25	47%	58%	4%
		Q4 2024/25	48%	57%	5%
	Lower Eastern	Q1 2024/25	34%	64%	6%
		Q2 2024/25	40%	60%	9%
		Q3 2024/25	36%	63%	7%
		Q4 2024/25	37%	62%	8%
	Nairobi	Q1 2024/25	68%	15%	25%
		Q2 2024/25	67%	19%	21%
		Q3 2024/25	67%	16%	23%
		Q4 2024/25	67%	17%	23%
	North Eastern	Q1 2024/25	53%	26%	28%
		Q2 2024/25	54%	27%	23%
		Q3 2024/25	53%	27%	26%
		Q4 2024/25	53%	27%	26%
North Western	Q1 2024/25	68%	32%	11%	
	Q2 2024/25	67%	30%	13%	
	Q3 2024/25	67%	32%	11%	

		Q4 2024/25	67%	31%	12%
	Rift	Q1 2024/25	70%	28%	8%
		Q2 2024/25	68%	29%	9%
		Q3 2024/25	69%	29%	9%
		Q4 2024/25	69%	29%	9%
	South Nyanza	Q1 2024/25	81%	22%	5%
		Q2 2024/25	75%	27%	8%
		Q3 2024/25	78%	24%	6%
		Q4 2024/25	78%	24%	7%
	Upper Eastern	Q1 2024/25	47%	49%	9%
		Q2 2024/25	49%	46%	9%
		Q3 2024/25	47%	49%	9%
		Q4 2024/25	48%	48%	9%
	Western	Q1 2024/25	91%	15%	2%
		Q2 2024/25	85%	17%	5%
		Q3 2024/25	88%	16%	3%
		Q4 2024/25	88%	16%	4%

## 4. TV Viewership Section

### 4.1. TV Viewer’s Key Demographics

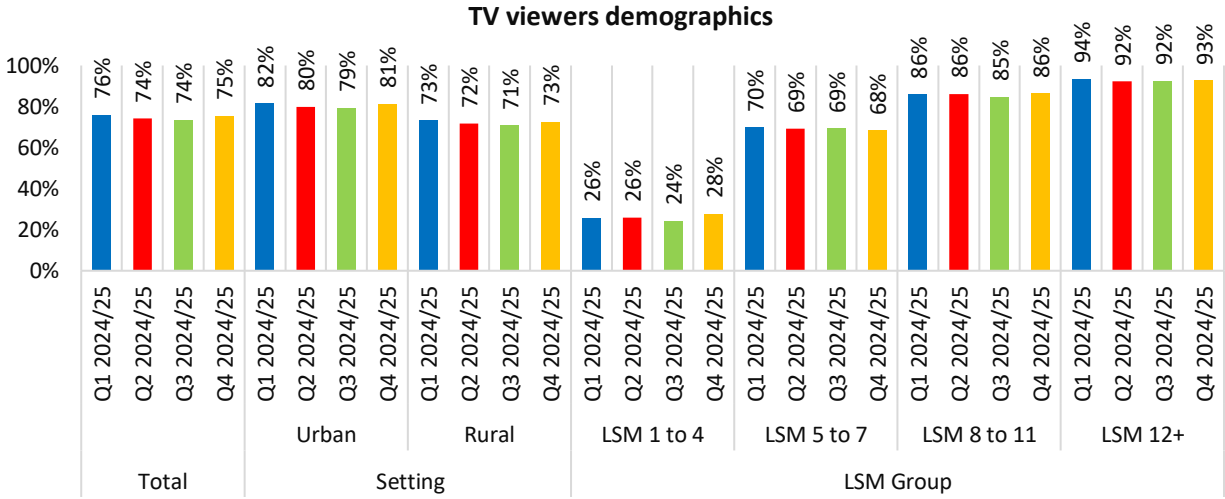
TV viewership remains consistently higher among males compared to females across all four quarters, with the gender gap most noticeable in Q1 and Q2 2024/25. Age-wise, the highest engagement is observed among youth aged 18–34 years, with viewership peaking at 82–89%, suggesting content appeal is strongest among younger audiences. However, there’s a clear decline in viewership among those aged 35 and above, especially in the 45+ years group, which dropped to 69% in Q2 and Q4. This downward trend may reflect a lack of age-inclusive programming, pointing to a missed opportunity by broadcasters to engage older audiences more effectively.



N=32.23M: All Respondents

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

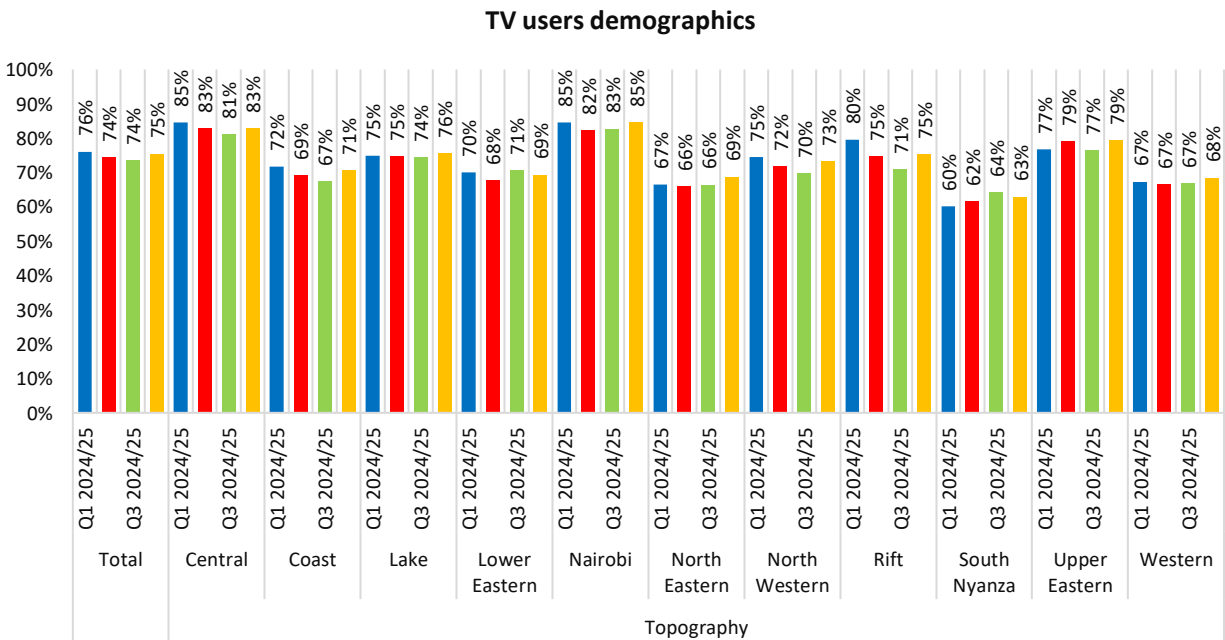
TV viewership remains consistently higher in urban areas than in rural settings across all quarters, with urban audiences recording figures above 80% compared to rural levels averaging around 73%. Socioeconomic status reveals even more pronounced disparities: viewership among LSM 1 to 4 is significantly 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 13: TV Viewership demographics – by total, setting and LSM

TV viewership is highest in Central and Nairobi, both consistently registering figures above 85% across all quarters. These are followed by Upper Eastern, which also maintains strong viewership levels. In contrast, South Nyanza reports the lowest TV viewership indicating significant regional disparities. Other regions like Rift, Lake, and North Western maintain moderate engagement levels, generally within the 70–75% range.

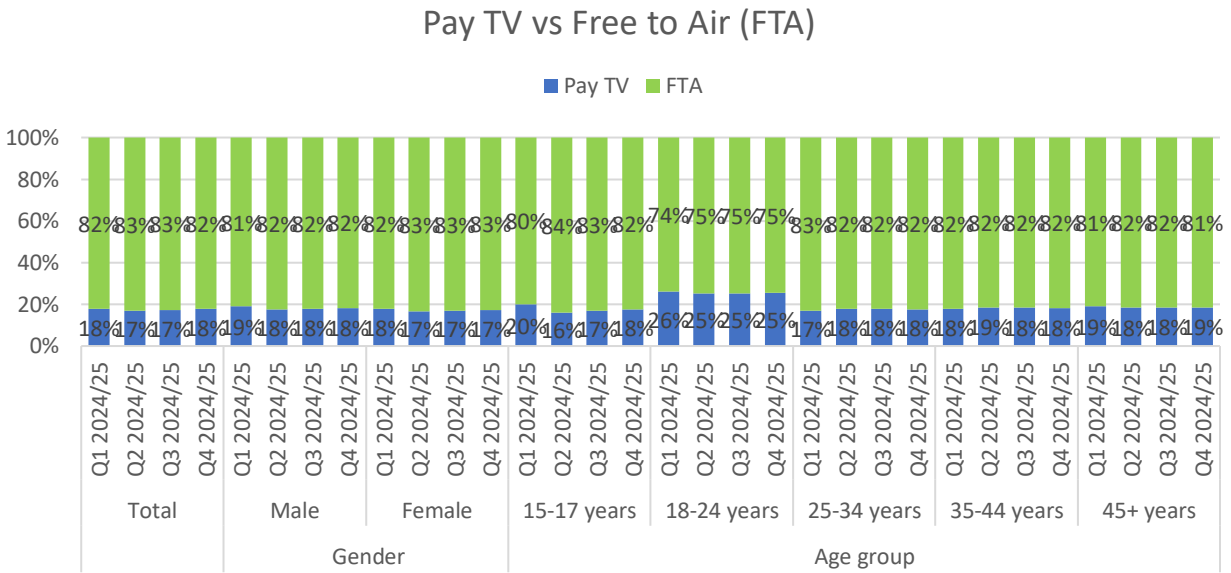


N=32.23M: All Respondents

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) 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.

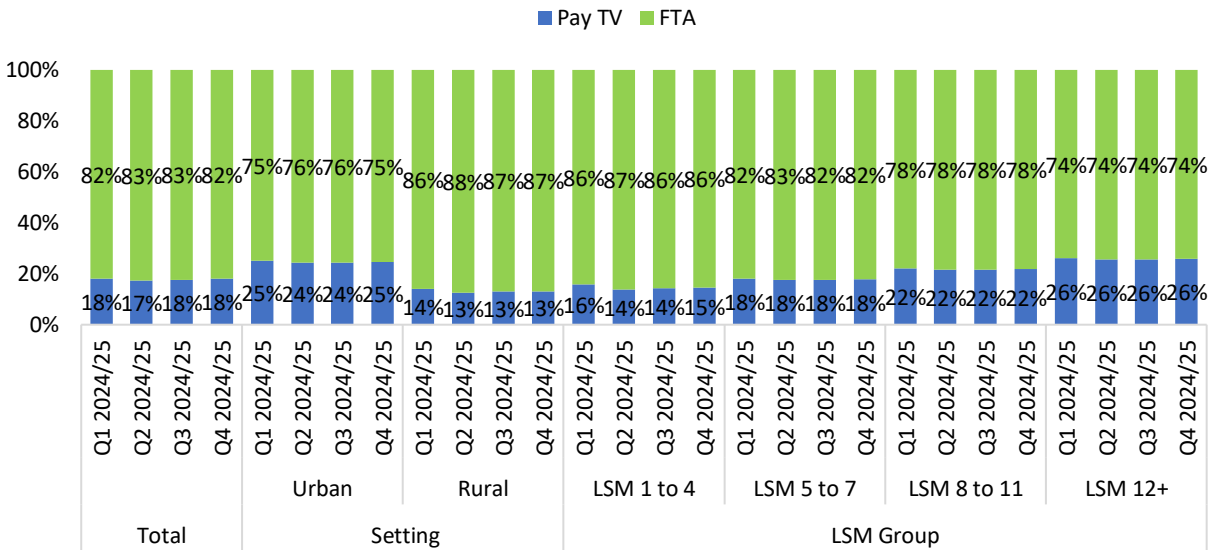


*n=24.3M: Average Daily TV Viewers*

Figure 15: 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.

## Pay TV vs Free to Air (FTA)



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

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

The prime advertising window falls between 19:00 and 22:00, when both audience size and number of ad spots peak. This strong alignment suggests that advertisers are strategically leveraging the evening prime time to maximize visibility and engagement. Audience size begins rising noticeably after 18:00, reinforcing the importance of evening hours for broad reach.

#### Low-Value Periods: Late Night and Early Morning

In contrast, the post-22:00 window shows a sharp decline in both audience size and advertising spots, indicating diminishing returns for late-night ads. Similarly, although a substantial number of ad spots are aired between 00:00 and 06:00, audience size remains negligible, pointing to poor cost-efficiency in those time blocks.

#### Secondary Advertising Opportunity: 12:00–18:00

Between noon and 18:00, both audience size and ad placements rise steadily, offering a secondary opportunity for targeted campaigns, particularly for products or services geared toward daytime viewers such as homemakers, small business owners, or students.

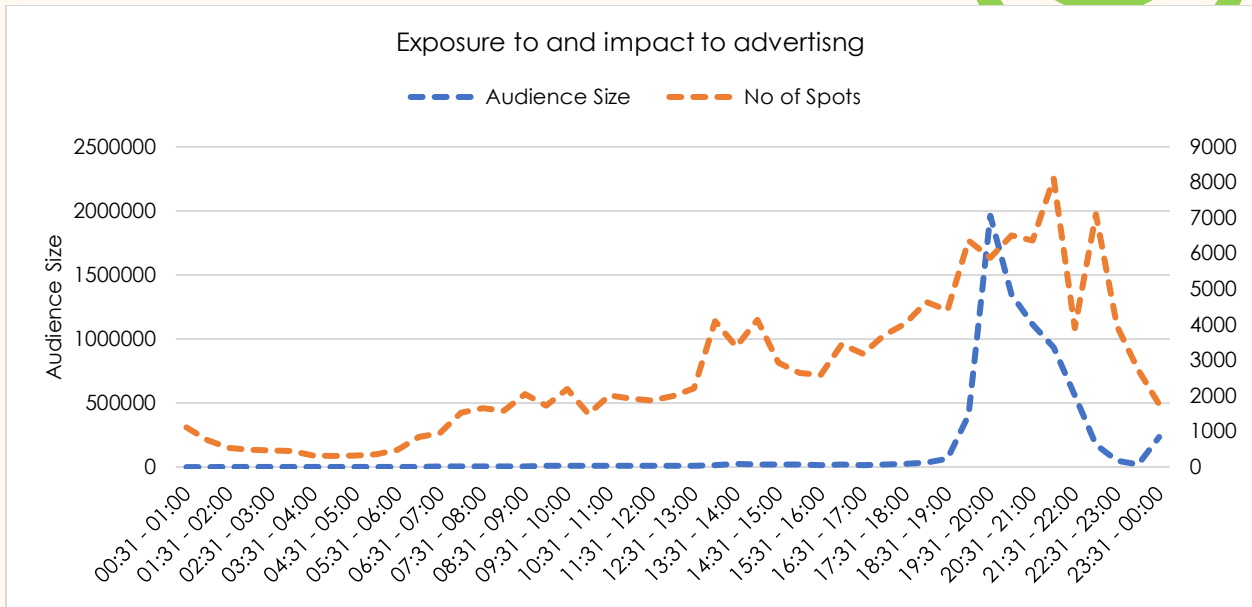


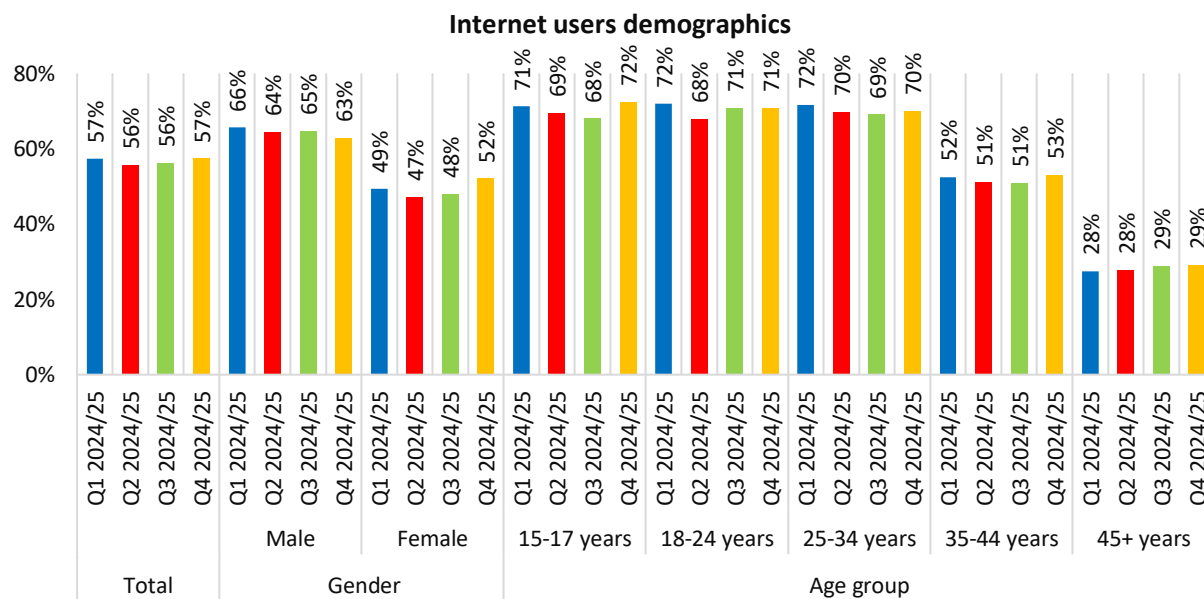
Figure 17: TV exposure to and impact to advertising

## 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 30%.



n=19.0M: Average Internet Users

Figure 18: 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.

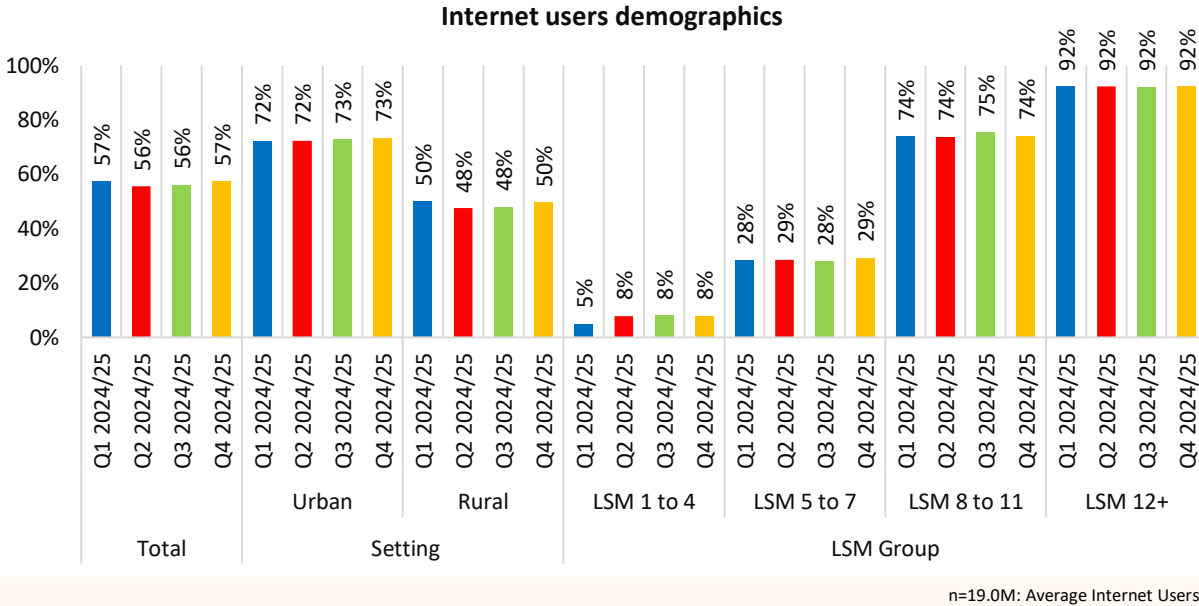


Figure 19: Internet users' demographics – total, setting and LSM

There are clear regional disparities in internet accessibility across Kenya. North Eastern leads in internet usage, consistently reporting the highest levels of access, closely followed by Nairobi, 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. Other regions such as Western, Upper Eastern, and Lake also show below-average access.

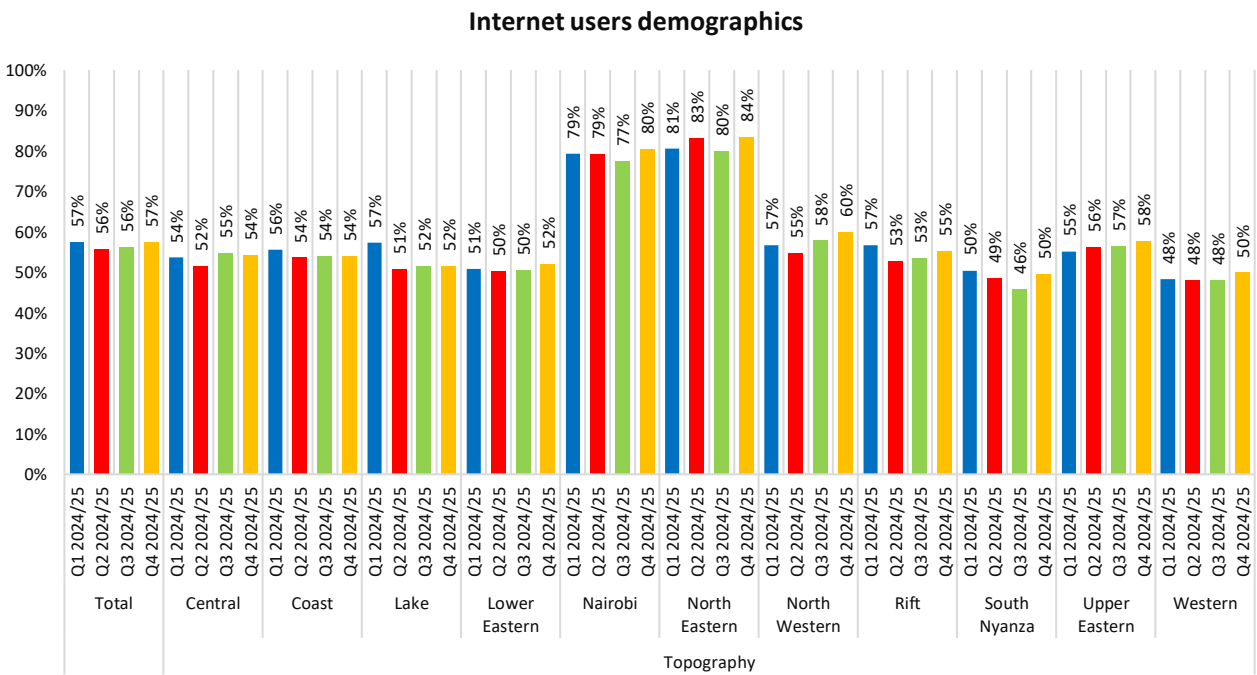


Figure 20: Internet users' demographics – total and topography

## 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.

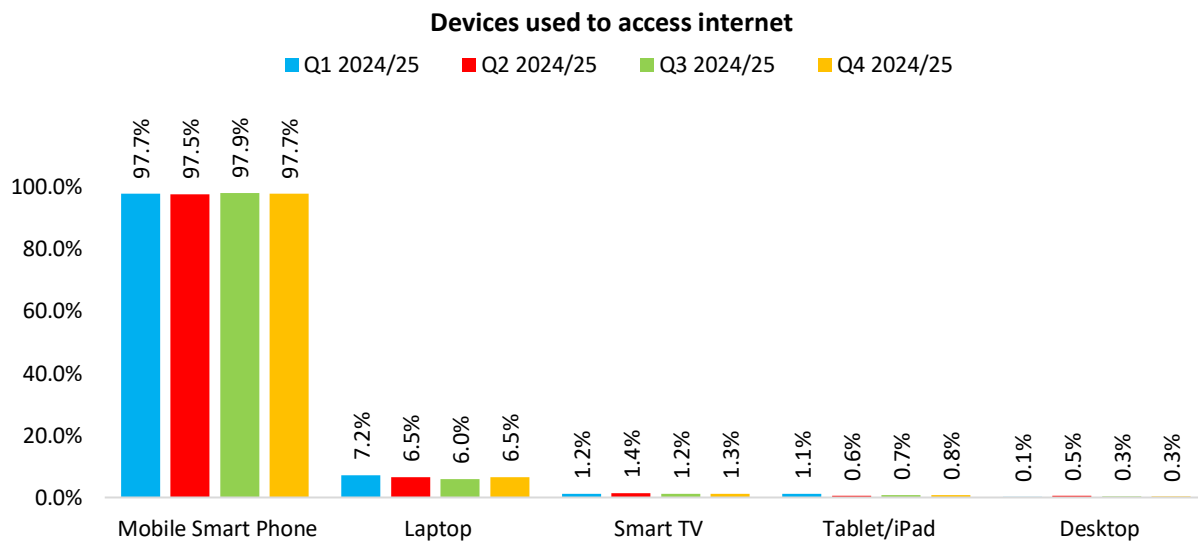


Figure 21: Devices used to access the internet

## 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.

### Social media platforms

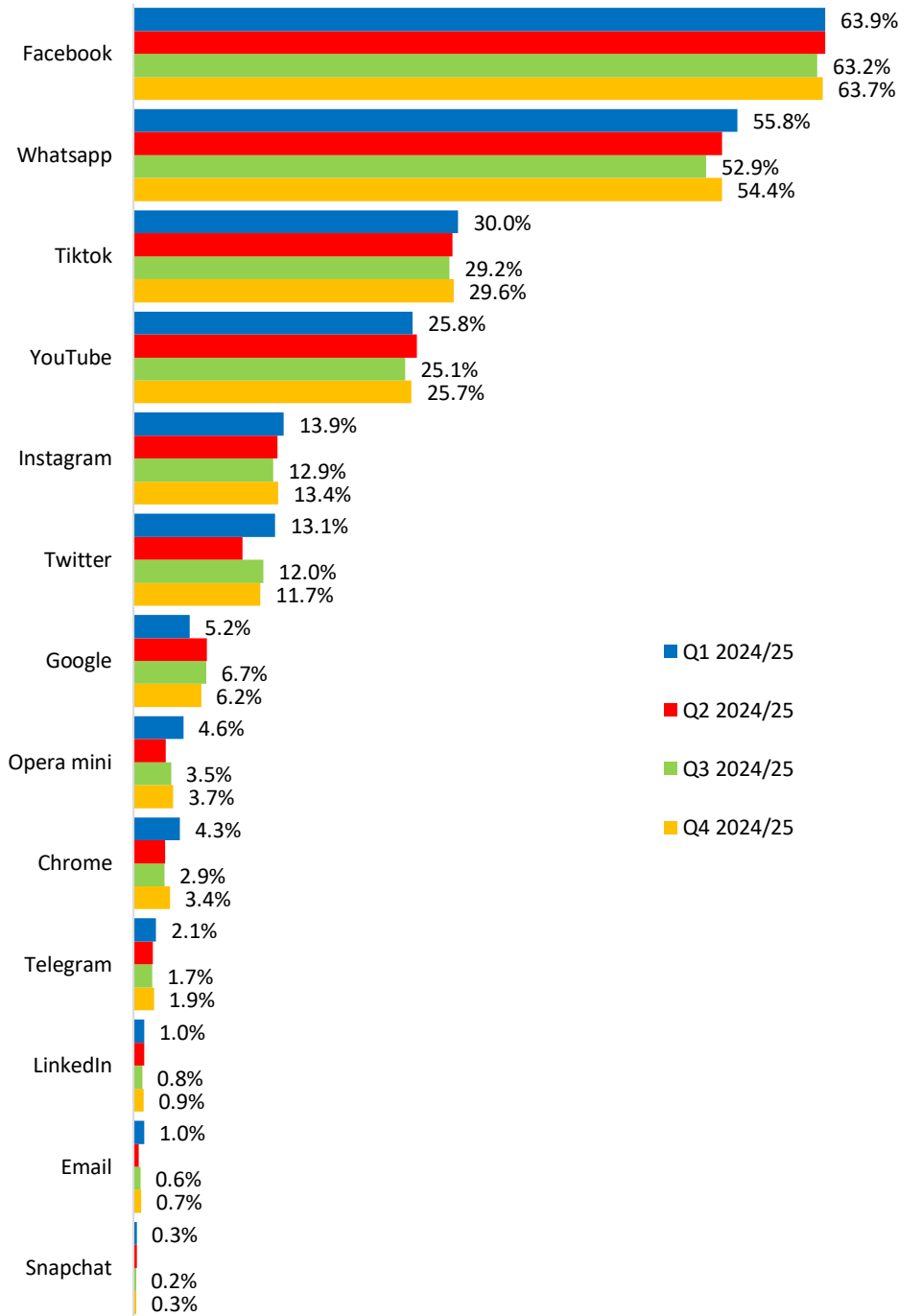
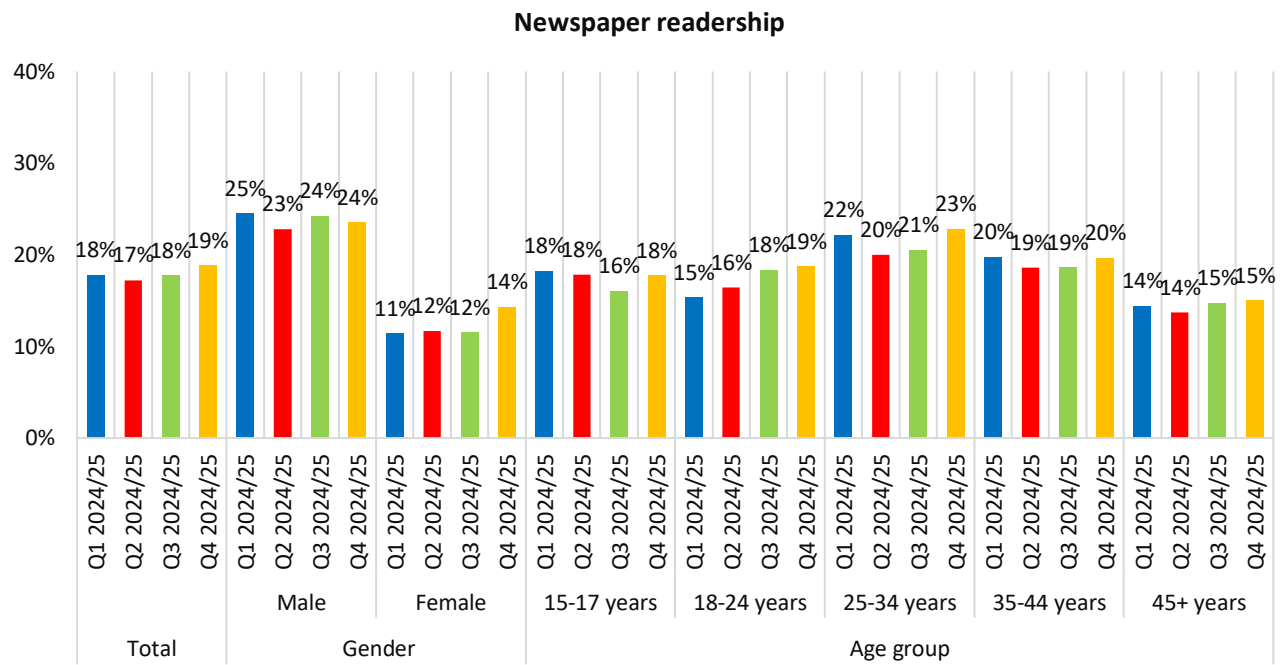


Figure 25: Popular social media platforms

## 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.

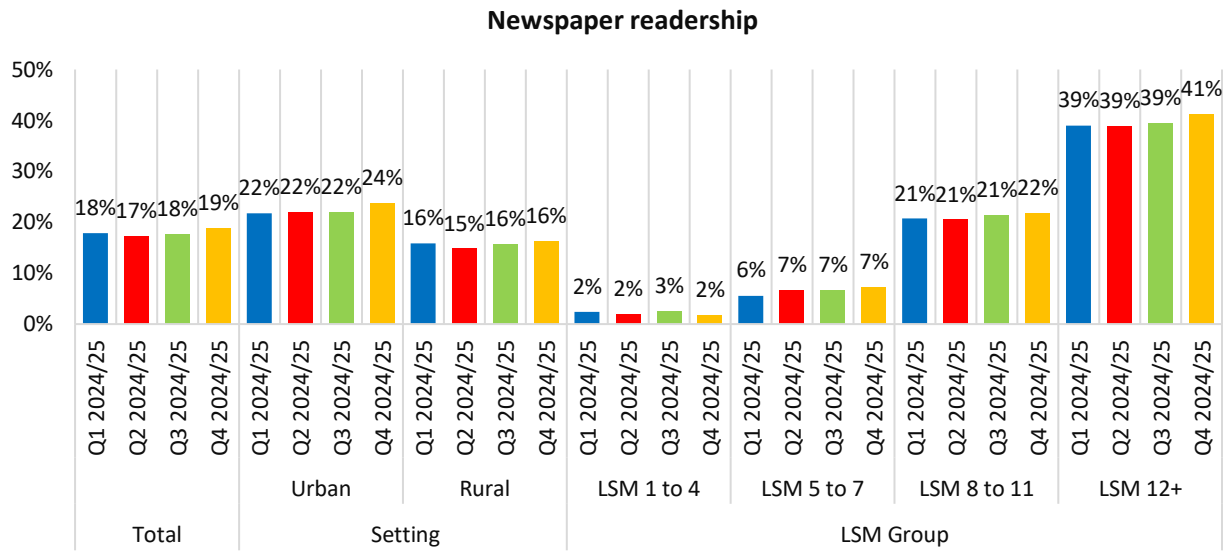


n=32.2M: All Respondents

Figure 22: 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.

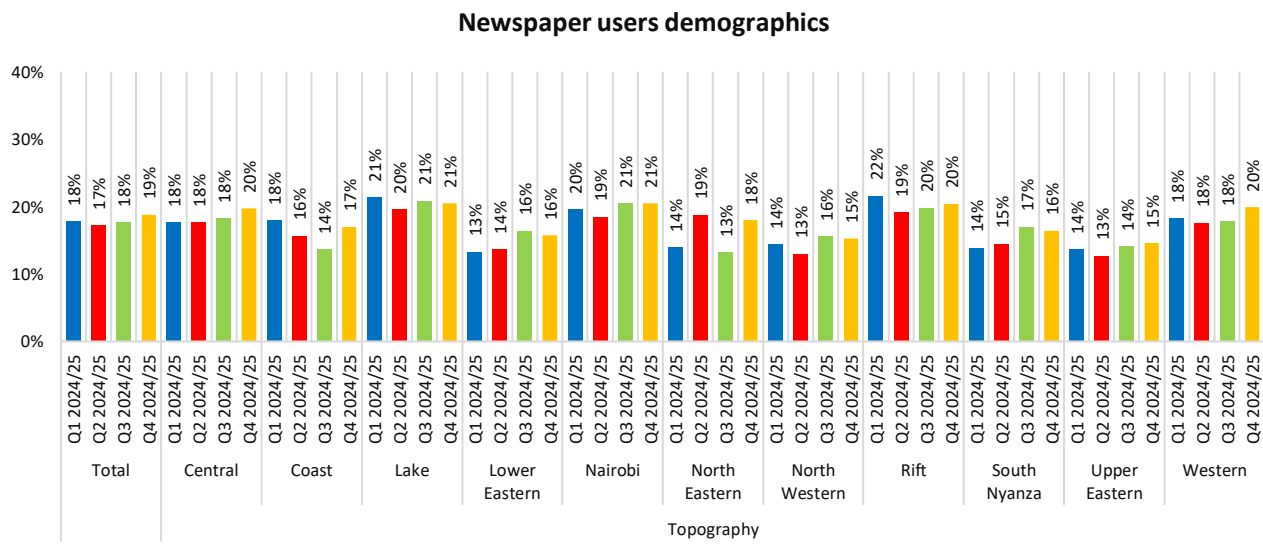
Additionally, readership strongly correlates with socioeconomic status, with the highest incidence recorded among individuals in the LSM 12+ group, where 41% (Q4) report reading newspapers regularly. In contrast, readership remains minimal among lower LSM groups (1 to 4).



n=32.2M: All Respondents

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

In Q4 2024/25, newspaper readership remained highest in the Lake and Nairobi regions, each recording a stable incidence of 21%, consistent with Q3 levels. These topographies continue to demonstrate stronger engagement with print media compared to other regions. The Rift region, which had experienced a decline from 22% in Q2 to 19% in Q3, saw a slight recovery to 20% in Q4.



n=32.2M: All Respondents

Figure 24: Newspaper readership demographics – by total and topography

## 7. Advertising Expenditure

### 7.1. Advertising Expenditure Overview

Overall industry spending dropped by -19% in Q4 2024/25. The industry's total spending decreased from 16 billion to Kes 15B between Q3 2024/25 and Q4 2024/25.

Table 7: Advertising Expenditure

Sectors	Q1 2024/25	Q2 2024/25	Q3 2024/25	Q4 2024/25	CHANGE (Q4-Q1)
Financial Services	2,262	2,136	2,069	2,320	-3%
Media	3,544	3,031	2,479	2,099	-18%
Corporate & Multi-brand	1,753	1,670	1,304	1,495	-22%
Personal Care	1,572	1,160	793	1,213	-32%
Betting & Gaming	2,507	1,738	2,191	1,185	26%
Communications	1,134	1,343	1,169	991	-13%
Property & Building & Acc.	1,126	864	850	850	-2%
Foods	810	1,663	789	808	-53%
Retail	533	2,232	1,119	799	-50%
Tourism & Entertainment	461	953	1,276	772	34%
Veterinary & Agriculture	336	697	355	751	-49%
Publishing & Education	505	496	718	698	45%
Beverage	594	822	382	582	-54%
Transport	252	360	176	558	-51%
Pharmaceuticals	395	537	339	424	-37%
Household	524	486	322	256	-34%
Clothing, Fabrics & Footwear	42	89	45	97	-49%
Office Equipment & Supplies	16	27	20	40	-26%
<b>Total</b>	<b>18,368</b>	<b>20,303</b>	<b>16,396</b>	<b>15,939</b>	<b>-19%</b>

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. 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	988	1,134	198	2,321	14.6%
Media	1,193	499	407	2,099	13.2%
Corporate & Multibrand	409	513	574	1,495	9.4%
Personal Care	1,082	131	0	1,213	7.6%
Betting & Gaming	796	330	60	1,185	7.4%
Communications	709	279	3	991	6.2%
Property & Building & Acc	631	200	19	850	5.3%
Foods	495	307	6	808	5.1%
Retail	567	226	5	799	5.0%

Tourism & Entertainment	629	122	21	772	4.8%
Veterinary & Agriculture	370	375	5	751	4.7%
Publishing & Education	432	180	86	698	4.4%
Beverage	145	436	1	582	3.7%
Transport	207	333	18	558	3.5%
Pharmaceuticals	287	125	12	424	2.7%
Household	155	93	8	256	1.6%
Clothing, Fabrics & Footwear	43	54	0	97	0.6%
Office Equipment & Supplies	13	23	3	40	0.3%
<b>TOTAL AD SPENDS KSHS</b>	<b>9,152</b>	<b>5,360</b>	<b>1,428</b>	<b>15,940</b>	<b>100.0%</b>

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.

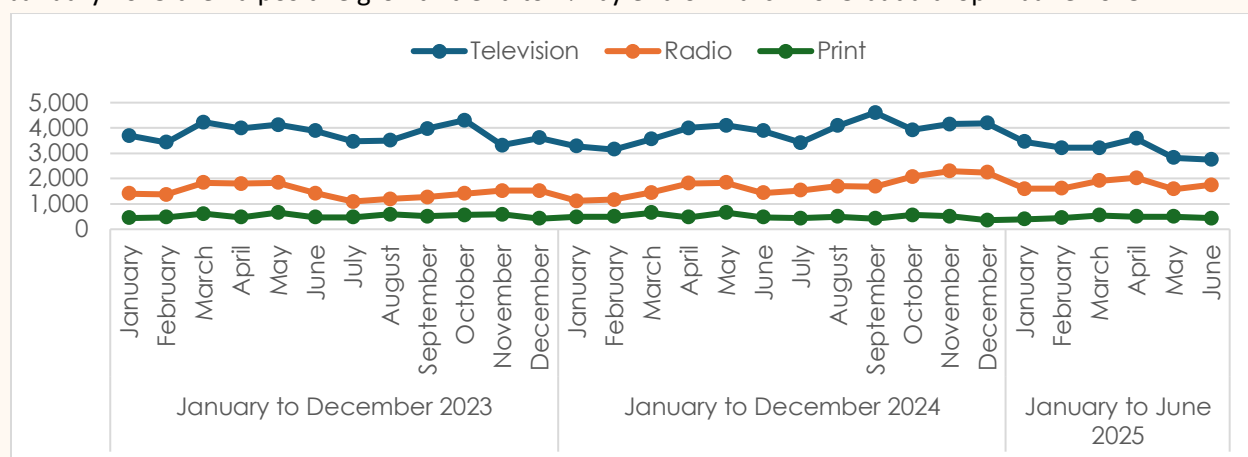


Figure 25: Advertising spends Jan 2023 to March 2025  
Key: Figures in KES Millions (000,000)

## 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.

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

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	Q1 2024/25	Q2 2024/25	Q3 2024/25	Q4 2024/25
Media	2330	1687	1552	1193
Personal Care	1435	1045	718	1082
Financial Services	1156	992	864	988
Betting & Gaming	1871	1150	1302	796
Communications	823	770	820	709
Property & Building & Acc.	1022	704	702	631
Tourism & Entertainment	378	685	936	629
Retail	383	1443	609	567
Foods	539	1220	580	495
Publishing & Education	300	336	490	432
Corporate & Multibrand	798	727	496	409
Veterinary & Agriculture	63	237	48	370
Pharmaceuticals	287	414	289	287
Transport	79	109	74	207
Household	304	284	224	155
Beverage	283	375	155	145
Clothing, Fabrics & Footwear	37	60	20	43
Office Equipment & Supplies	12	24	4	13

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 Corporate & Multibrand in Q4 2024/25

Table 10: Radio spends by sector/industry

Sector	Q1 2024/25	Q2 2024/25	Q3 2024/25	Q4 2024/25
Financial Services	950	378	1014	1134

Corporate & Multibrand	405	89	284	513
Media	760	375	564	499
Beverage	310	243	222	436
Veterinary & Agriculture	271	213	303	375
Transport	139	44	75	333
Betting & Gaming	629	259	887	330
Foods	269	139	208	307
Communications	304	298	348	279
Retail	136	598	490	226
Property & Building & Acc	72	54	122	200
Publishing & Education	158	13	177	180
Personal Care	137	100	73	131
Pharmaceuticals	94	43	43	125
Tourism & Entertainment	68	71	190	122
Household	210	71	92	93
Clothing, Fabrics & Footwear	4	7	23	54
Office Equipment's & Supplies	2	1	8	23

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 across all quarters with a notable increase in Q4 2024/25.

Table 11: Print spends by sector/industry

SECTOR	Q1 2024/25	Q2 2024/25	Q3 2024/25	Q4 2024/25
Corporate & Multibrand	686	604	524	574
Media	430	399	363	407
Financial Services	221	169	192	198
Publishing & Education	56	51	51	86
Betting & Gaming	40	4	1	60
Tourism & Entertainment	7	48	151	21
Property & Building & Acc.	48	37	26	19
Transport	40	48	27	18
Pharmaceuticals	7	8	7	12
Household	10	10	6	8
Foods	2	1	1	6
Veterinary & Agriculture	7	2	5	5
Retail	17	25	20	5
Communications	19	7	1	3
Office Equipment & Supplies	1	0	7	3
Beverage	10	6	4	1
Clothing, Fabrics & Footwear	3	5	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

#### ❖ Declining Ad Spend in Key Sectors

- There has been a notable drop in advertising expenditure across several sectors including personal care, betting, retail, and media indicating reduced marketing budgets or a strategic shift away from traditional media. This places pressure on broadcasters' revenue streams.

#### ❖ Underperformance of Print and Pay TV

- While free-to-air (FTA) TV remains dominant, print media and Pay TV platforms are seeing low reach and declining advertiser interest, limiting their viability and long-term sustainability.

#### ❖ Limited Youth Engagement on Traditional Platforms

- Younger audiences (especially 15–24 years) are increasingly turning to social media and streaming services, leading to declining relevance of traditional platforms like radio and TV among this group. Traditional broadcasters risk becoming disconnected from this influential demographic.

#### ❖ Widening Urban-Rural Access Gap

- Urban areas and higher LSM groups enjoy richer media access, while rural and low-income populations remain constrained by infrastructure, cost, and content availability worsening the digital divide.

#### ❖ Fragmented Audience Habits and Attention Spans

- The rise of short-form content and social media scrolling has led to reduced attention spans, making it harder for broadcasters to retain viewers through long-format programming or traditional scheduling models.

### Opportunities in the Broadcasting Industry in Kenya

#### ❖ Growth in Digital and Multi-Platform Audiences

- With over 57% of the population regularly using the internet, and mobile-first consumption becoming the norm, broadcasters can extend their reach through social media, online streaming, podcasts, and mobile apps. Multi-platform strategies will be essential for audience growth.

#### ❖ Mobile Accessibility and Content Innovation

- Smartphones are the primary device for internet access in Kenya. This creates room for mobile-friendly content formats such as short videos, mobile radio, WhatsApp programming, and SMS-based audience engagement, especially among Gen Z and young adults.

#### ❖ Data-Driven Content and Advertising Strategies

- With improved audience measurement (e.g., reach, share, spot frequency by time blocks), broadcasters can tailor content and advertising to match specific audience profiles, time segments, and regions, optimizing return on investment and viewer satisfaction.

❖ **Rise of On-Demand and Interactive Formats**

- Kenyan audiences especially youth are increasingly shifting toward on-demand and personalized content. This presents a strong opportunity to develop hybrid broadcasting models (live + digital replays) and integrate interactive features like polls, comments, and user-generated content.

❖ **Educational and Informational Programming Gaps**

- With social media often seen as an entertainment-first platform, broadcasters can fill the gap by offering educational, civic, or career-related content especially for youth, women, and underserved rural audiences.

❖ **Educational and Informational Programming Gaps**

- Government and private sector initiatives aimed at expanding digital infrastructure, local content development, and rural connectivity present room for broadcasters to co-develop or syndicate content, especially in health, agriculture, and civic education.