AUDIENCE MEASUREMENT AND INDUSTRY TRENDS REPORT

April 2026

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1. INTRODUCTION

Kenya's media sector is one of the most advanced and dynamic in Sub-Saharan Africa, characterized by a well-established traditional broadcasting foundation alongside a rapidly evolving digital ecosystem. Radio remains the most pervasive medium, with over 200 stations broadcasting in both national and vernacular languages, ensuring deep cultural resonance and extensive reach across urban and rural populations. Television continues to play a central role following the 2015 migration to digital terrestrial broadcasting, which expanded channel availability and improved signal quality, strengthening content diversity and competition among broadcasters.

At the same time, the rapid growth in mobile phone penetration supported by affordable smartphones and expanding 3G/4G coverage has significantly accelerated internet adoption. This has transformed how audiences access content, with increasing consumption of social media, streaming services, and online video platforms. As a result, Kenya's media environment is becoming increasingly multi-platform and audience-centric, with consumers seamlessly shifting between traditional and digital channels.

Advertising investment trends reflect this hybrid structure. Free-to-Air television continues to command the largest share of advertising expenditure due to its unmatched national reach and ability to deliver mass audiences at scale. Radio remains a critical complementary medium, valued for its high frequency, strong commuter listenership, and localized targeting through vernacular stations. However, digital advertising is experiencing sustained and rapid growth, driven by mobile-first behavior, data-driven targeting capabilities, and the rise of global platforms such as Meta and Google. This has led to a more competitive and fragmented advertising landscape, with budgets increasingly distributed across multiple platforms to optimize reach, engagement, and conversion.

In response to these shifts, media houses are facing increasing pressure to adapt their business models, diversify revenue streams, and invest in digital transformation. Traditional revenue sources, particularly advertising, are under strain as global digital platforms capture a growing share of ad spend. At the same time, audience fragmentation and changing consumption habits require continuous innovation in content creation, distribution, and audience engagement strategies.

Within this evolving landscape, the importance of reliable audience measurement and industry data cannot be overstated. Robust, independent research is essential to support evidence-based decision-making for regulators, media owners, and advertisers alike. It enables effective policy formulation, enhances market transparency, and guides strategic investments in content, technology, and infrastructure. Ultimately, such insights are critical to ensuring the sustainability, competitiveness, and inclusive growth of Kenya's rapidly transforming media industry.

2. MEDIA AUDIENCE MEASUREMENT

2.1. Ways in Which Media is Consumed

Media usage remained broadly stable across all four quarters, reflecting entrenched consumption behaviors. Mobile phones continue to dominate access to digital and social media content, while radio and television remain closely tied to traditional devices. Despite this stability, subtle shifts suggest the early stages of media convergence and an emerging preference for mobile-first consumption.

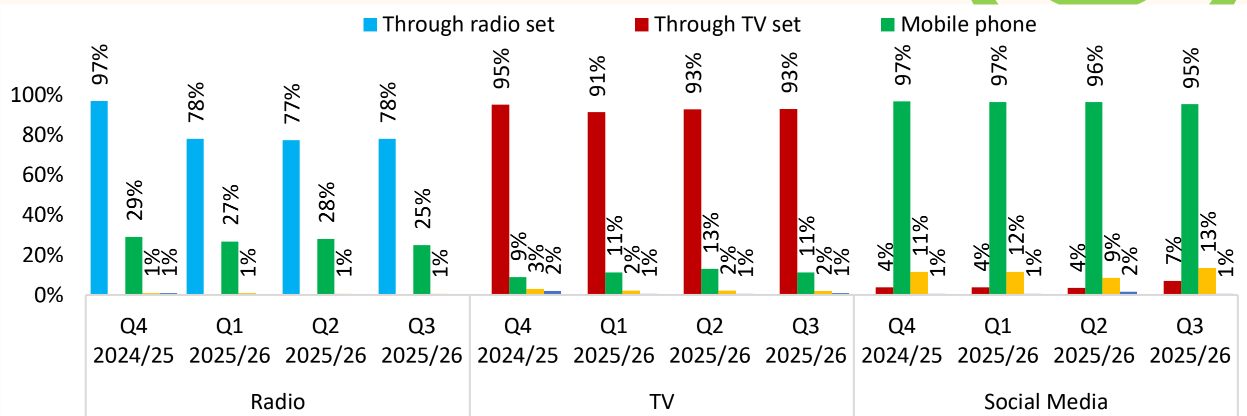


Figure 1: Ways in which media is consumed by total

2.2. Place of Media Consumption

Across all four quarters, media consumption by location remained stable. The home remains the main site of media use, where television marginally outperforms radio. Television also dominates media consumption in workplaces and is the preferred medium in social settings such as bars, restaurants, and hotels.

Table 1: Place of media consumption by total

Place of Media Consumption	Total				Radio				TV			
	Q4 2024 /25	Q1 2025 /26	Q2 2025 /26	Q3 2025 /26	Q4 2024 /25	Q1 2025 /26	Q2 2025 /26	Q3 2025 /26	Q4 2024 /25	Q1 2025 /26	Q2 2025 /26	Q3 2025 /26
At own home	90%	90%	89%	87%	87%	87%	89%	86%	86%	90%	89%	88%
Place of work	4%	3%	4%	8%	3%	3%	3%	12%	4%	4%	4%	4%
Bar/Restaurant/Hotel	2%	6%	2%	5%	3%	2%	4%	3%	7%	8%	6%	7%
Someone else's household	3%	1%	3%	3%	2%	2%	2%	3%	3%	3%	1%	3%
Bus/Taxi/Matatu	1%	1%	1%	1%	2%	2%	2%	2%	0%	0%	0%	0%
In car - Private	1%	2%	1%	0%	2%	2%	2%	1%	0%	0%	0%	0%
On the move	1%	1%	0%	2%	1%	1%	1%	3%	0%	0%	0%	0%

2.3. Access and usage of traditional media & digital media

Access and usage of media in the last seven days remained largely stable across the four quarters. Radio and television continued to have the widest reach, with radio usage fluctuating narrowly between 73% and 75%, while television showed a slight decline from 75% to 73% by Q3 2025/26. Both platforms show only marginal quarter-to-quarter variation, reinforcing their continued dominance in regular media consumption.

Internet usage shows minor fluctuations, increasing from 57% in Q4 2024/25 to a peak of 60% in Q1 2025/26, before declining to 59% in Q2 2025/26 and further to 57% in Q3 2025/26. This pattern suggests stable but slightly softening short-term digital engagement.

In contrast, print media continues to lag behind. Newspaper readership remained flat at around 19% through Q2 2025/26, before declining to 15% in Q3 2025/26, indicating a recent drop in usage. Magazine consumption was consistently the lowest, declining from 8% to 5% over the period, with a slight downward trend observed.

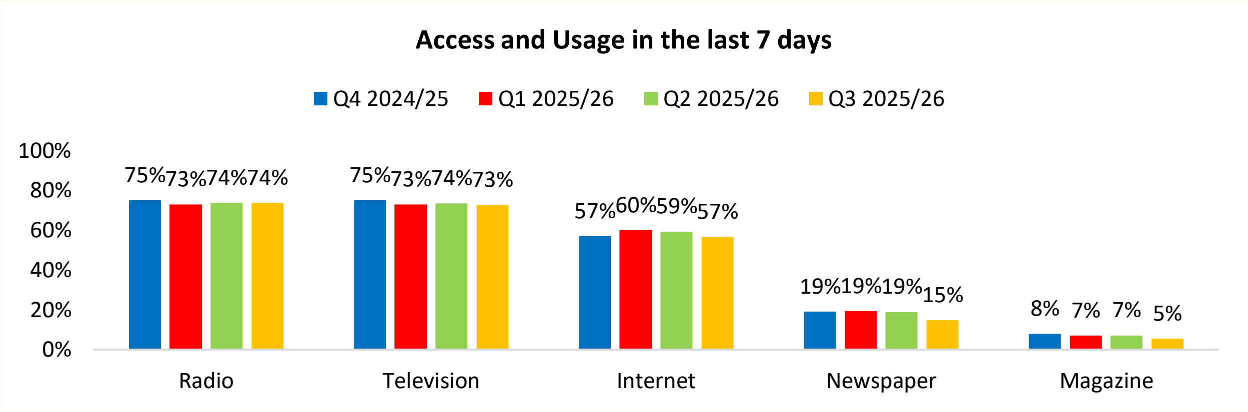


Figure 2: Access and Usage of media by total

Media consumption differs by gender across all quarters, with men reporting higher usage than women. Men are more likely to access radio, television, internet platforms, and digital news, as well as print media such as newspapers and magazines. This suggests continued gender differences in media access and consumption.

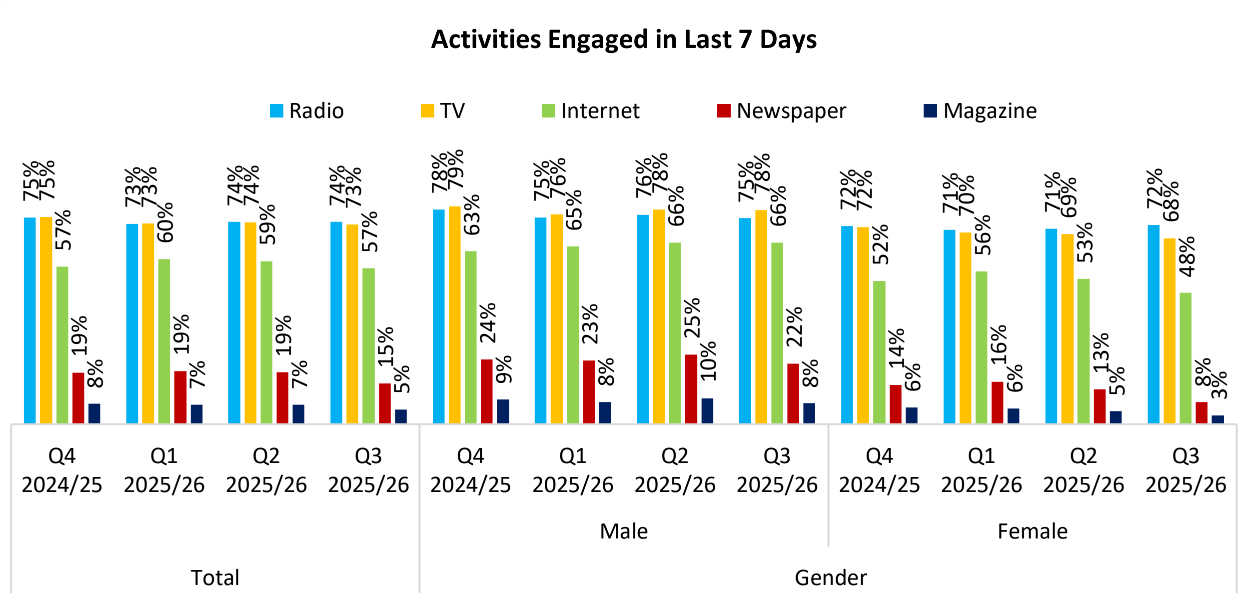


Figure 3: Activities Engaged in Last 7 Days - by total & gender

Among individuals in the LSM 1 to 4 category, radio remains the dominant medium due to its accessibility and affordability, with consistently high usage across all quarters, making it a reliable source of information and entertainment despite fluctuations in other media.
Equally, in urban areas and among individuals in the higher LSM 12+ category, television consumption remains consistently high alongside strong internet usage, while radio shows a gradual decline. This contrast highlights the influence of socio-economic status and infrastructure on media consumption preferences.

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

		Quarter	Radio	TV	Internet	Newspaper	Magazine
Total		Q4 2024/25	75%	75%	57%	19%	8%
		Q1 2025/26	73%	73%	60%	19%	7%
		Q2 2025/26	74%	74%	59%	19%	7%
		Q3 2025/26	74%	73%	57%	15%	5%
LSM Group	**LSM 1 to 4**	Q4 2024/25	90%	28%	8%	2%	1%
		Q1 2025/26	90%	24%	9%	3%	2%
		Q2 2025/26	95%	21%	4%	2%	1%
		Q3 2025/26	93%	30%	8%	2%	1%
	LSM 5 to 7	Q4 2024/25	75%	68%	29%	7%	2%
		Q1 2025/26	76%	65%	26%	7%	3%
		Q2 2025/26	75%	66%	25%	7%	3%
		Q3 2025/26	81%	67%	26%	4%	2%
	LSM 8 to 11	Q4 2024/25	73%	86%	74%	22%	8%
		Q1 2025/26	72%	80%	75%	21%	7%
		Q2 2025/26	72%	80%	73%	21%	6%
		Q3 2025/26	70%	80%	73%	17%	5%
	LSM 12+	Q4 2024/25	70%	93%	92%	41%	20%
		Q1 2025/26	63%	92%	92%	38%	15%
		Q2 2025/26	65%	93%	93%	36%	17%
		Q3 2025/26	60%	93%	92%	32%	13%

In Q3 2025/26, radio and television remained the most accessed media nationally, at 74% and 73% respectively. Radio use was highest in Rift, Western, Lake, and Lower Eastern, while television viewership was strongest in Nairobi and Upper Eastern, supported by better infrastructure and access. Internet access was highest in Nairobi, followed by North Eastern, reflecting continued strong digital engagement. Newspaper readership was highest in Lower Eastern and Lake, while magazine consumption remained low across all regions.

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

	Quarter	Radio	TV	Internet	Newspaper	Magazine
Total	Q4 2024/25	75%	75%	57%	19%	8%
	Q1 2025/26	73%	73%	60%	19%	7%
	Q2 2025/26	74%	74%	59%	19%	7%
	Q3 2025/26	74%	73%	57%	15%	5%
Central	Q4 2024/25	70%	71%	54%	17%	9%
	Q1 2025/26	71%	78%	60%	20%	5%
	Q2 2025/26	74%	79%	59%	19%	6%
	Q3 2025/26	71%	79%	58%	14%	4%
Coast	Q4 2024/25	70%	71%	54%	17%	9%
	Q1 2025/26	71%	68%	58%	11%	5%
	Q2 2025/26	68%	69%	58%	15%	5%
	Q3 2025/26	65%	67%	59%	6%	2%
Lake	Q4 2024/25	81%	76%	52%	21%	10%
	Q1 2025/26	83%	74%	53%	22%	9%
	Q2 2025/26	82%	74%	62%	24%	9%
	Q3 2025/26	83%	67%	58%	17%	5%
Lower Eastern	Q4 2024/25	86%	69%	52%	16%	8%
	Q1 2025/26	83%	72%	52%	22%	12%
	Q2 2025/26	83%	73%	50%	19%	13%
	Q3 2025/26	83%	73%	47%	20%	11%
Nairobi	Q4 2024/25	64%	85%	80%	21%	8%
	Q1 2025/26	60%	81%	80%	21%	7%
	Q2 2025/26	63%	84%	80%	22%	6%
	Q3 2025/26	60%	82%	77%	17%	5%
North Eastern	Q4 2024/25	45%	69%	84%	18%	10%
	Q1 2025/26	30%	68%	76%	19%	3%
	Q2 2025/26	34%	63%	76%	14%	2%
	Q3 2025/26	30%	67%	73%	14%	1%
North Western	Q4 2024/25	53%	73%	60%	15%	4%
	Q1 2025/26	61%	67%	69%	16%	6%
	Q2 2025/26	59%	70%	68%	15%	4%
	Q3 2025/26	65%	63%	65%	12%	3%
Rift	Q4 2024/25	81%	75%	55%	20%	8%
	Q1 2025/26	82%	68%	56%	20%	7%
	Q2 2025/26	81%	72%	56%	19%	8%
	Q3 2025/26	85%	67%	48%	17%	8%
South Nyanza	Q4 2024/25	84%	63%	50%	16%	7%
	Q1 2025/26	79%	68%	49%	20%	8%
	Q2 2025/26	80%	63%	48%	20%	8%

	Q3 2025/26	82%	69%	43%	16%	6%
Upper Eastern	Q4 2024/25	78%	79%	58%	15%	5%
	Q1 2025/26	76%	80%	64%	18%	6%
	Q2 2025/26	79%	77%	59%	17%	7%
	Q3 2025/26	79%	82%	58%	14%	9%
Western	Q4 2024/25	84%	68%	50%	20%	6%
	Q1 2025/26	81%	69%	53%	20%	8%
	Q2 2025/26	81%	68%	48%	19%	7%
	Q3 2025/26	83%	72%	48%	14%	6%

2.4. Number of Media Consumed

In Q3 2025/26, the share of individuals consuming only one media platform edged up to 26%, indicating a slight shift away from broader media use. Consumption of two media platforms increased to 38%, reflecting a modest rise in cross-platform engagement. Meanwhile, multiple media consumption (three or more platforms) declined to 36%, suggesting a slight reduction in more diversified media use.

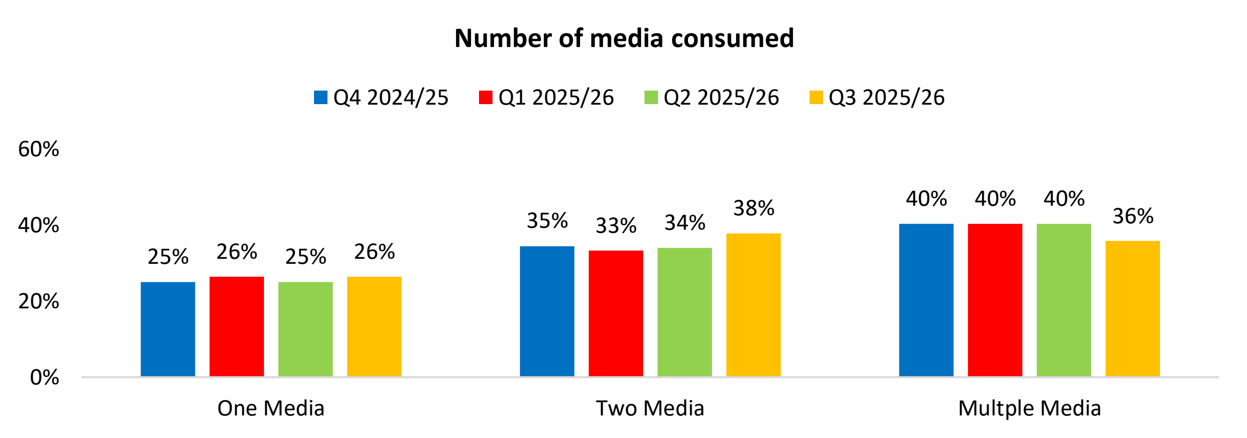


Figure 4: Number of media consumed by total

2.5. Type of Media Consumed

Across the four quarters, media consumption patterns consistently indicate a strong preference for multi-platform engagement, particularly combinations involving radio, television, and online platforms. The radio–TV–online mix remained the most common combination, stabilizing at around 20% and slightly declining to 20.3% in Q3 2025/26. The combination of radio and television also remained popular, increasing to 18.1% in Q3 2025/26.

Single-platform consumption persists, with radio-only users rising slightly to 15.9%, highlighting the continued relevance of traditional media alongside growing digital use. Consumption of only television remained stable, while online-only usage declined slightly in Q3 2025/26. Niche combinations involving print media remained low and, in some cases, declined further. Overall, the findings reinforce the central role of radio, television, and online platforms in shaping Kenya's media consumption landscape.

Table 4: Combination of media Consumed by total

Type of Media Consumed	Q4 2024/25	Q1 2025/26	Q2 2025/26	Q3 2025/26
Radio+TV+Online	21.4%	20.8%	20.7%	20.3%
Radio+TV	17.1%	14.7%	15.5%	18.1%
Radio Only	14.4%	14.5%	14.8%	15.9%
All Media	13.7%	13.1%	13.6%	10.3%
TV+Online	11.5%	11.9%	12.0%	13.1%
TV Only	6.5%	6.5%	6.1%	6.0%
Online Only	4.0%	5.3%	5.4%	4.5%
Radio+Online	4.0%	5.0%	4.3%	5.5%
Radio+TV+Print	3.3%	3.1%	3.2%	2.4%
TV+Print+Online	1.5%	2.3%	2.0%	2.1%
Print+Online	0.8%	0.5%	0.4%	0.3%
Radio+Print	0.7%	0.7%	0.7%	0.4%
Radio+Print+Online	0.5%	0.9%	0.8%	0.7%
TV+Print	0.4%	0.4%	0.4%	0.4%
Print Only	0.1%	0.0%	0.0%	0.0%

2.6. Frequency of Media Consumption

In Q3 2025/26, daily media consumption remained strongest for television and radio, each used daily by around 51% of the population, underscoring their continued dominance in everyday media habits. Social media daily use remained stable at 31%, showing consistent engagement compared to previous quarters. In contrast, online video streaming saw a slight increase to 36% daily use, though a significant share still engages infrequently.

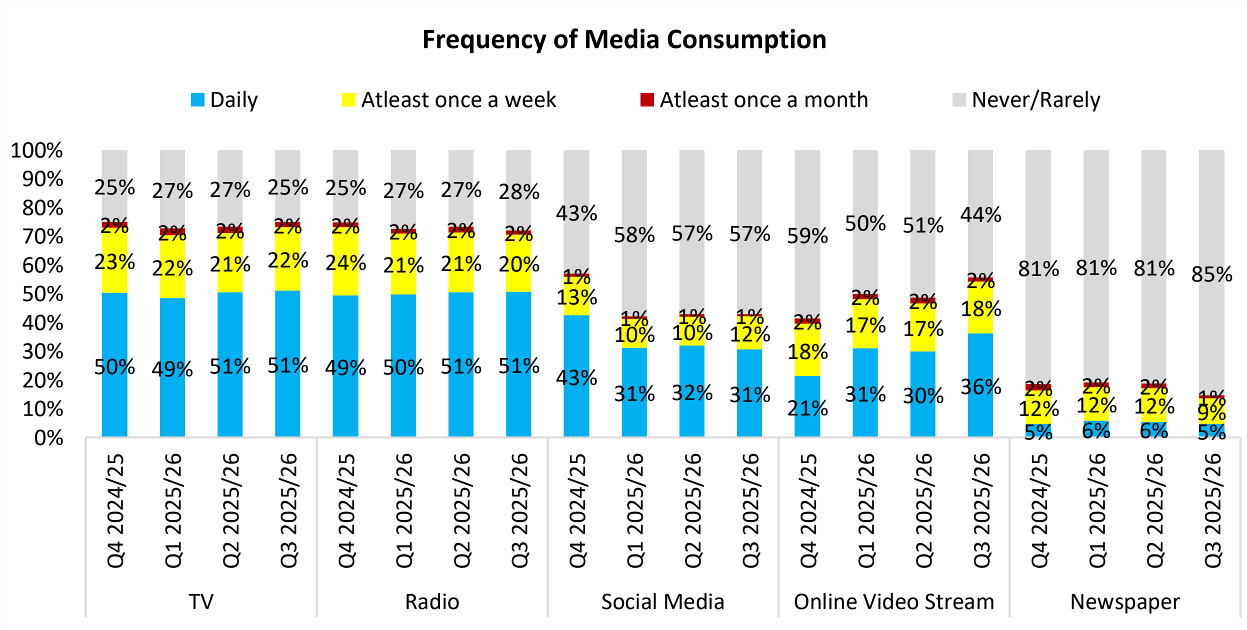


Figure 5: Frequency of consuming Tv, radio, social media, online streams and newspapers

2.7. Demographics of Media Consumers Profiles

In Q3 2025/26, media consumption patterns remained broadly consistent across demographic and socioeconomic groups. Men continued to lead in newspaper readership and online use, with the gap widening further, while radio and TV consumption remained broadly balanced by gender. Young adults aged 18–34, particularly those aged 25–34, remained the most active consumers across platforms, while the 15–17 age group continued to show the lowest engagement, especially with traditional media. Older audiences (45+) maintained stronger reliance on radio and TV, with comparatively lower online use.

Geographically, rural audiences continued to dominate radio consumption, while TV usage remained higher in rural areas but relatively stable. Urban residents led in online and print media use, with a slight increase in online engagement. Socioeconomic disparities persisted, with lower LSM groups (1-4) relying heavily on radio, middle LSM groups (5-7) showing moderate multi-platform use, and higher LSM groups (8-11 and 12+) maintaining the strongest engagement with TV, online platforms, and newspapers.

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	Q4 2024/25	51%	52%	62%	54%
		Q1 2025/26	51%	51%	59%	53%
		Q2 2025/26	51%	52%	66%	55%
		Q3 2025/26	50%	53%	73%	57%
	Female	Q4 2024/25	49%	48%	39%	46%
		Q1 2025/26	49%	49%	41%	47%
		Q2 2025/26	49%	48%	34%	45%
		Q3 2025/26	50%	47%	27%	43%
Age group	15-17 years	Q4 2024/25	10%	11%	11%	15%
		Q1 2025/26	11%	11%	11%	14%
		Q2 2025/26	11%	12%	12%	14%
		Q3 2025/26	11%	11%	9%	14%
	18-24 years	Q4 2024/25	20%	23%	22%	27%
		Q1 2025/26	20%	22%	22%	27%
		Q2 2025/26	21%	22%	19%	26%
		Q3 2025/26	20%	22%	21%	27%
	25-34 years	Q4 2024/25	24%	25%	30%	30%
		Q1 2025/26	24%	26%	27%	28%
		Q2 2025/26	23%	25%	26%	29%
		Q3 2025/26	24%	25%	27%	28%
	35-44 years	Q4 2024/25	19%	18%	18%	16%
		Q1 2025/26	19%	18%	18%	16%
		Q2 2025/26	18%	18%	20%	17%

		Q3 2025/26	19%	18%	18%	16%
	45+ years	Q4 2024/25	27%	23%	20%	13%
		Q1 2025/26	27%	24%	23%	15%
		Q2 2025/26	27%	24%	23%	14%
		Q3 2025/26	26%	25%	25%	15%
Setting	Urban	Q4 2024/25	28%	36%	42%	42%
		Q1 2025/26	29%	35%	40%	42%
		Q2 2025/26	29%	36%	39%	42%
		Q3 2025/26	28%	36%	41%	44%
	Rural	Q4 2024/25	72%	65%	58%	58%
		Q1 2025/26	71%	65%	60%	59%
		Q2 2025/26	71%	64%	61%	58%
		Q3 2025/26	72%	64%	59%	56%
LSM Group	LSM 1 to 4	Q4 2024/25	15%	5%	1%	2%
		Q1 2025/26	14%	4%	1%	2%
		Q2 2025/26	13%	3%	1%	1%
		Q3 2025/26	16%	5%	1%	2%
	LSM 5 to 7	Q4 2024/25	26%	23%	10%	13%
		Q1 2025/26	24%	21%	9%	10%
		Q2 2025/26	23%	20%	8%	10%
		Q3 2025/26	27%	23%	6%	11%
	LSM 8 to 11	Q4 2024/25	44%	52%	53%	58%
		Q1 2025/26	45%	50%	49%	56%
		Q2 2025/26	46%	51%	50%	57%
		Q3 2025/26	42%	48%	51%	56%
	LSM 12+	Q4 2024/25	16%	21%	37%	27%
		Q1 2025/26	18%	26%	41%	32%
		Q2 2025/26	18%	26%	40%	33%
		Q3 2025/26	16%	24%	42%	31%

3. Radio Listenership Section

3.1. Radio Listeners' Key Demographics

Radio listenership remains consistently higher among males than females and increases with age, peaking among adults aged 35-44 and 45+, while adolescents aged 15-17 continue to record the lowest levels across all quarters, despite slight fluctuations over time.

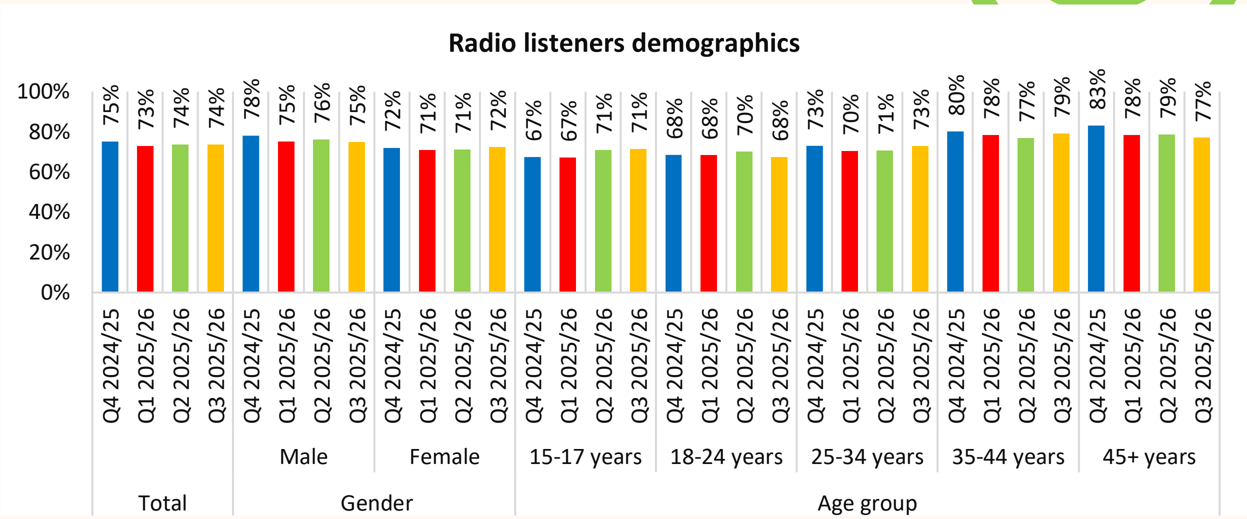


Figure 6: Demographics of radio consumers– by total, gender & age group

Radio listenership remains broadly stable over time, but clear structural differences emerge across segments. Consumption is consistently stronger in rural areas compared to urban settings, where there is a gradual softening in engagement. By socio-economic status, listenership is highest among lower LSM groups and progressively declines as affluence increases, with the highest LSM segment showing the weakest and steadily declining engagement. Middle LSM groups maintain relatively moderate and stable levels throughout.

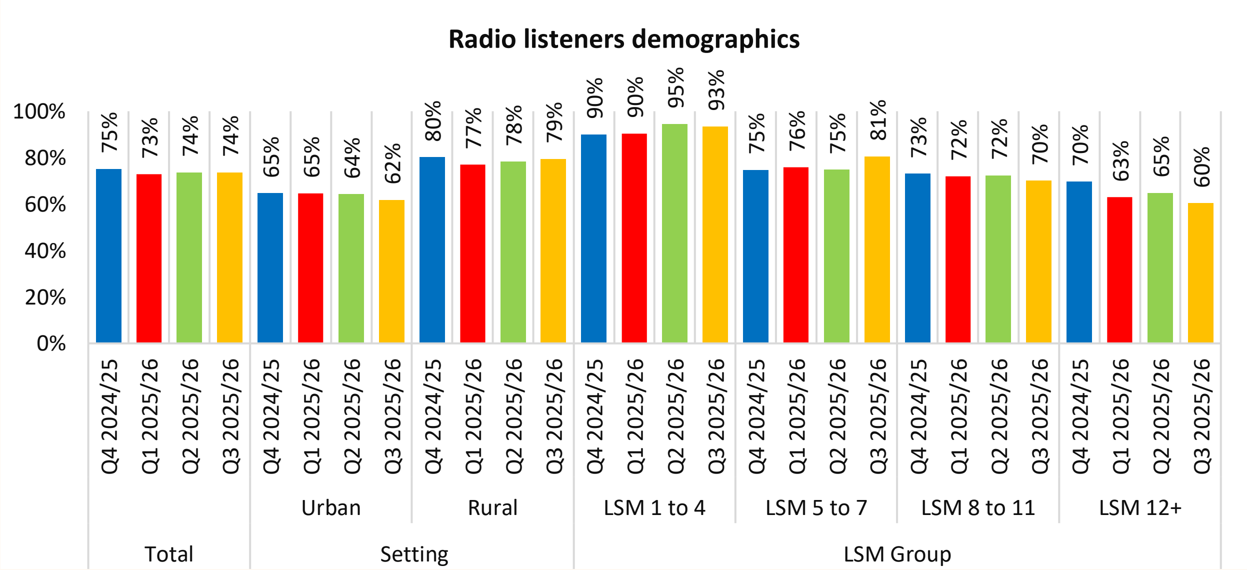


Figure 7: Demographics of radio consumers– by total, setting and LSM

In Q3 2025/26, radio listenership was highest in Rift, Lower Eastern, Lake and Western regions (80%+), while North Eastern recorded the lowest uptake, with Nairobi and North Western also trailing the national average, highlighting clear regional disparities in radio use.

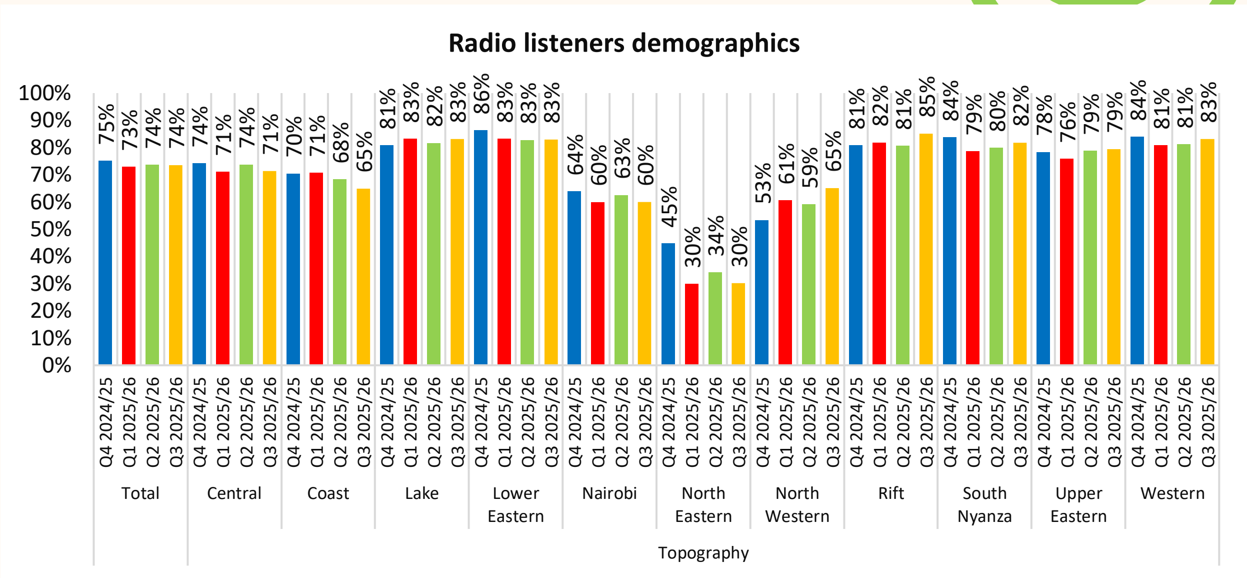


Figure 8: Demographics of radio consumers– by total, Topography

3.2. Radio Genre Preference

Radio listenership in Kenya is strongly driven by news and current affairs, which account for nearly half of listeners (46.7%), highlighting radio's central role as a trusted source of information. Entertainment and talk shows follow as the second most popular genre, attracting about a fifth of the audience. Music and sports occupy a solid middle position, reflecting varied listener interests. Religious or inspirational content draws a smaller audience, while educational, informative, and lifestyle or cultural content remain niche with minimal reach.

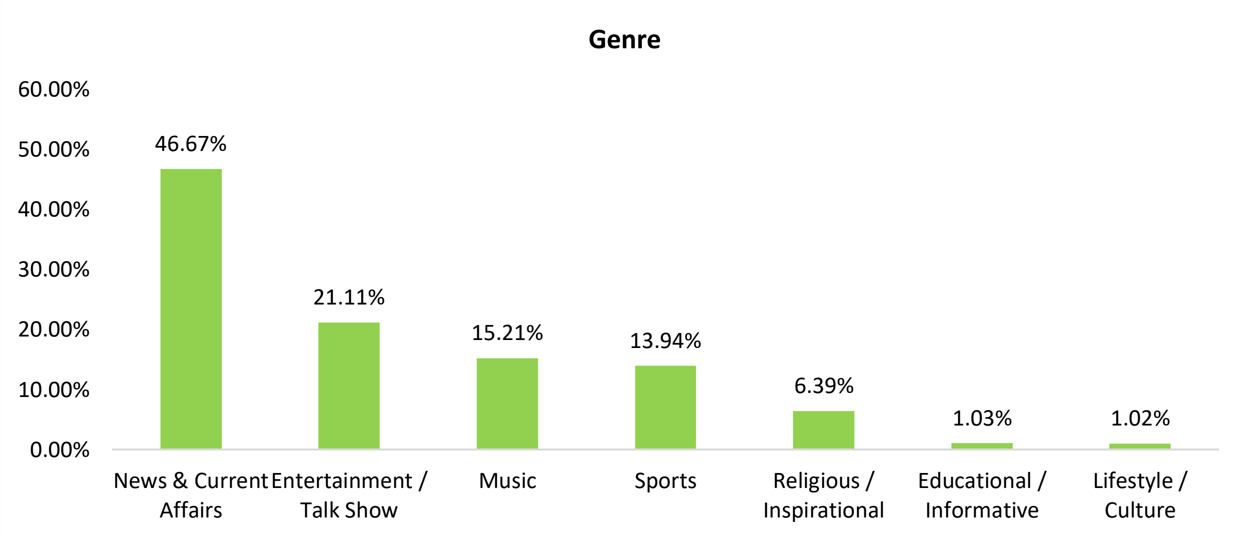


Figure 9: Radio Genre Preference

3.3. Radio Listenership Language

Swahili continues to be the primary language of radio consumption across all quarters, accounting for the largest share of listeners among both male and female audiences, with a slight upward trend among males. On average, over 60% of male listeners and around mid-50% of female listeners tune into Swahili-language stations. Vernacular stations remain the second most preferred, with consistently higher uptake among female audiences compared to males. English-language stations attract the smallest share of listeners, remaining stable at low levels across quarters and genders.

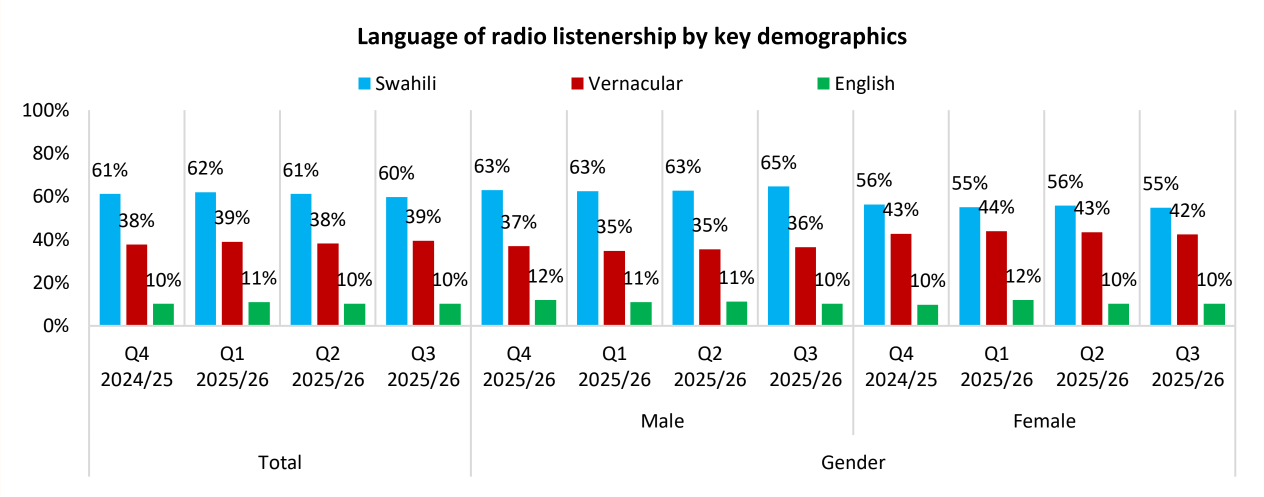


Figure 10: Radio listenership language by total and gender

Swahili continues to be the main language used for radio listening in both urban and rural areas across all quarters. Vernacular stations are more widely listened to in rural areas than in urban settings. In contrast, urban listeners show a much stronger preference for English-language stations, with listenership levels almost three times higher than those in rural areas.

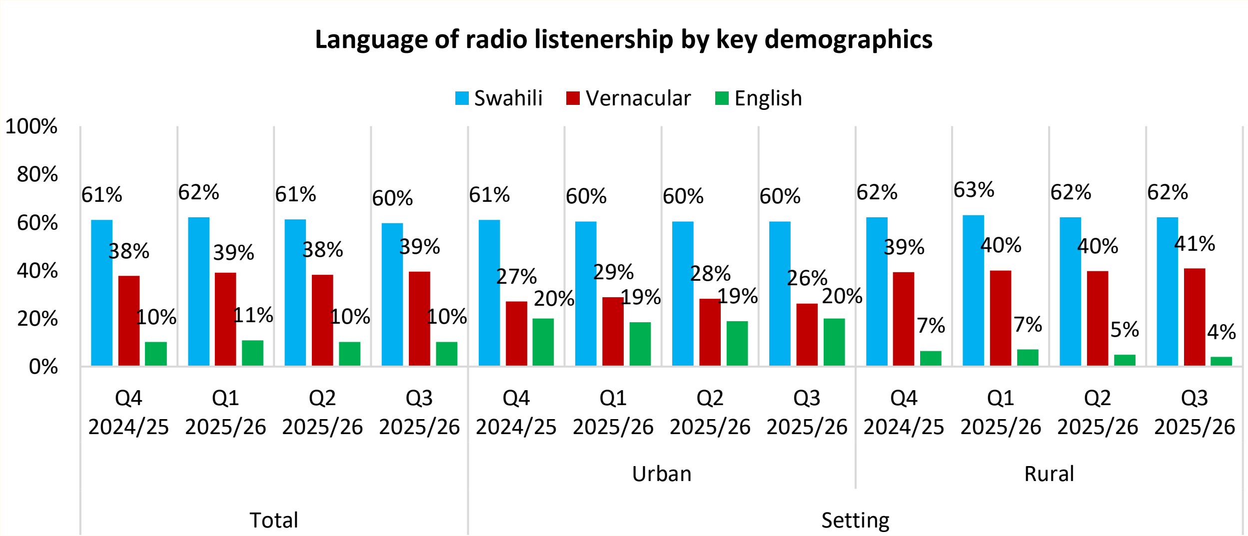


Figure 11: Radio listenership language by total & setting

Swahili and vernacular languages remain the main languages used for radio listening among lower to middle LSM groups (LSM 1-11), with over 60% tuning into Swahili stations and strong vernacular listenership, particularly in LSM 1-4. Among higher LSM listeners (LSM 12+), Swahili listenership is lower at around the mid-50% range, while English radio listening is notably higher and continues to increase, indicating a stronger preference for English-language content among higher-income audiences.

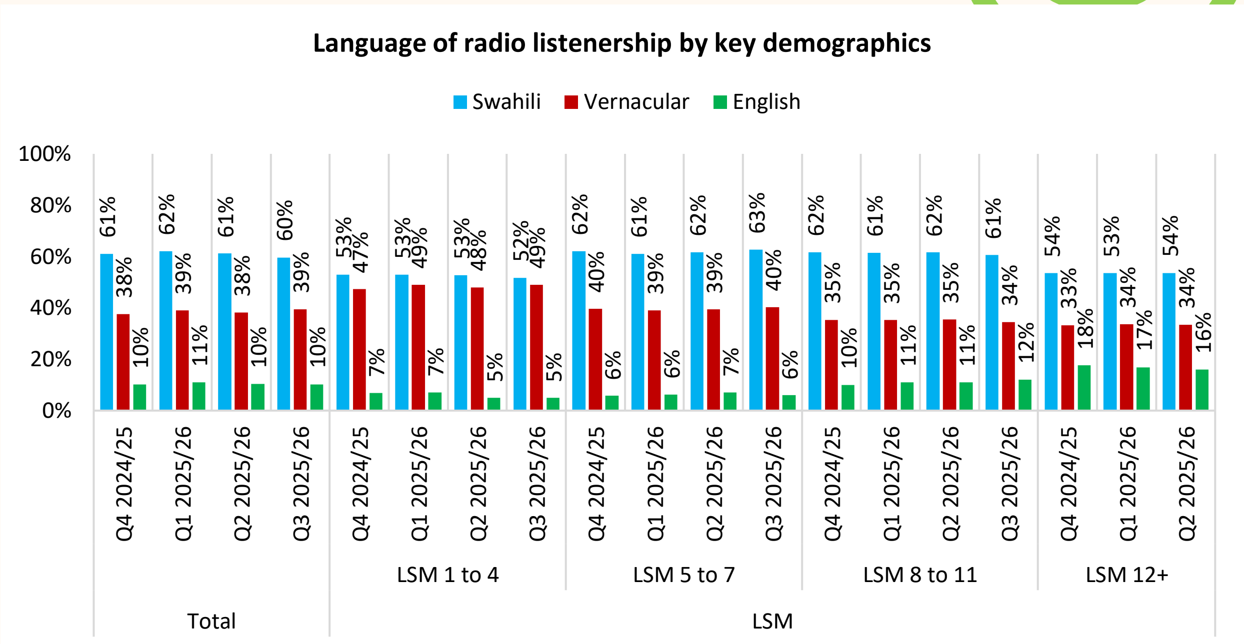


Figure 12: Radio listenership language by total & LSM

Swahili-language radio stations continue to have the strongest following in Western and South Nyanza, consistently exceeding 75%, with Western remaining the highest at around 88% in Q3 2025/26. Similarly, strong Swahili preference is observed in Rift. Conversely, vernacular radio maintains its highest uptake in Lower Eastern and Lake regions, where it exceeds 60% of listeners, reflecting strong cultural and linguistic ties. English-language radio, though limited in reach overall, continues to see relatively higher traction in urbanized regions like Nairobi and North Eastern, with Nairobi maintaining a consistent 24% share.

Table 6: Radio listenership language by total and topography

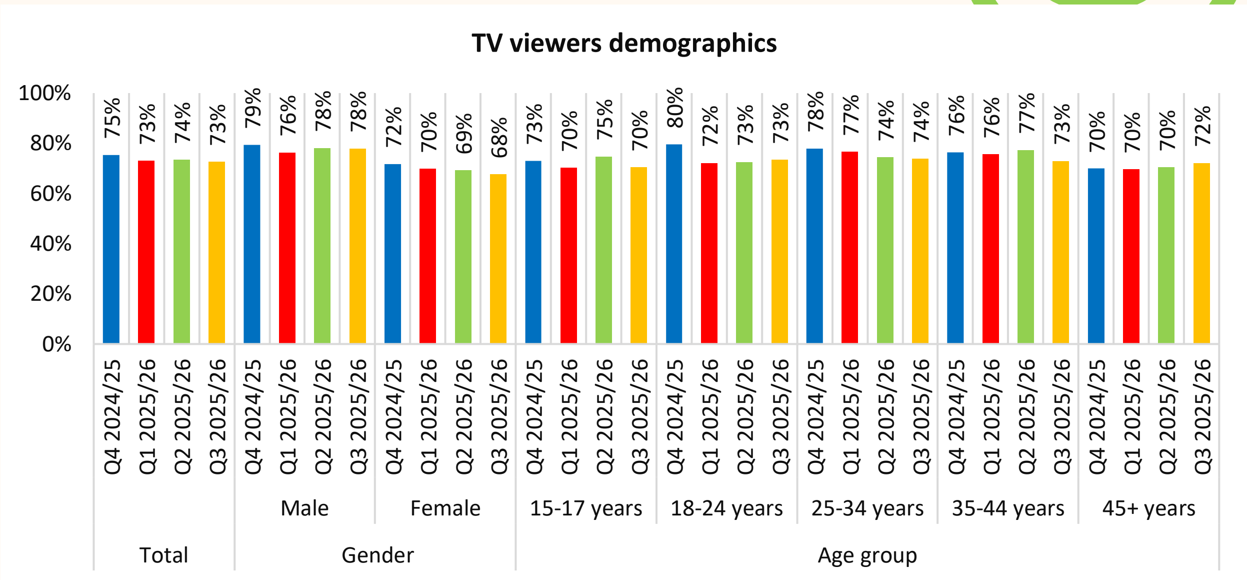
Total/ Topography		Financial Year	Radio listenership language		
			Swahili	Vernacular	English
Total		Q4 2024/25	60%	39%	10%
		Q1 2025/26	62%	39%	11%
		Q2 2025/26	61%	38%	10%
		Q3 2025/26	60%	39%	10%
Topography	Central	Q4 2024/25	44%	52%	11%
		Q1 2025/26	45%	53%	10%
		Q2 2025/26	44%	52%	10%
		Q3 2025/26	44%	53%	9%
	Coast	Q4 2024/25	61%	31%	15%
		Q1 2025/26	62%	32%	13%
		Q2 2025/26	61%	32%	14%
		Q3 2025/26	63%	31%	13%
	Lake	Q4 2024/25	48%	57%	5%
		Q1 2025/26	45%	58%	5%
		Q2 2025/26	47%	58%	5%
		Q3 2025/26	47%	59%	4%

	Lower Eastern	Q4 2024/25	37%	62%	8%
		Q1 2025/26	36%	63%	8%
		Q2 2025/26	36%	63%	8%
		Q3 2025/26	35%	64%	8%
	Nairobi	Q4 2024/25	67%	17%	23%
		Q1 2025/26	67%	16%	24%
		Q2 2025/26	67%	16%	24%
		Q3 2025/26	68%	17%	24%
	North Eastern	Q4 2024/25	53%	27%	26%
		Q1 2025/26	54%	27%	25%
		Q2 2025/26	53%	27%	26%
		Q3 2025/26	54%	27%	26%
	North Western	Q4 2024/25	67%	31%	12%
		Q1 2025/26	68%	33%	10%
		Q2 2025/26	67%	32%	11%
		Q3 2025/26	67%	31%	10%
	Rift	Q4 2024/25	69%	29%	9%
		Q1 2025/26	71%	30%	8%
		Q2 2025/26	70%	29%	8%
		Q3 2025/26	69%	29%	8%
	South Nyanza	Q4 2024/25	78%	24%	7%
		Q1 2025/26	77%	25%	6%
		Q2 2025/26	78%	25%	6%
		Q3 2025/26	78%	24%	8%
	Upper Eastern	Q4 2024/25	48%	48%	9%
		Q1 2025/26	49%	51%	8%
		Q2 2025/26	48%	49%	9%
		Q3 2025/26	47%	49%	9%
	Western	Q4 2024/25	88%	16%	4%
		Q1 2025/26	87%	17%	4%
		Q2 2025/26	88%	15%	4%
		Q3 2025/26	88%	16%	4%

4. TV Viewership Section

4.1. TV Viewer's Key Demographics

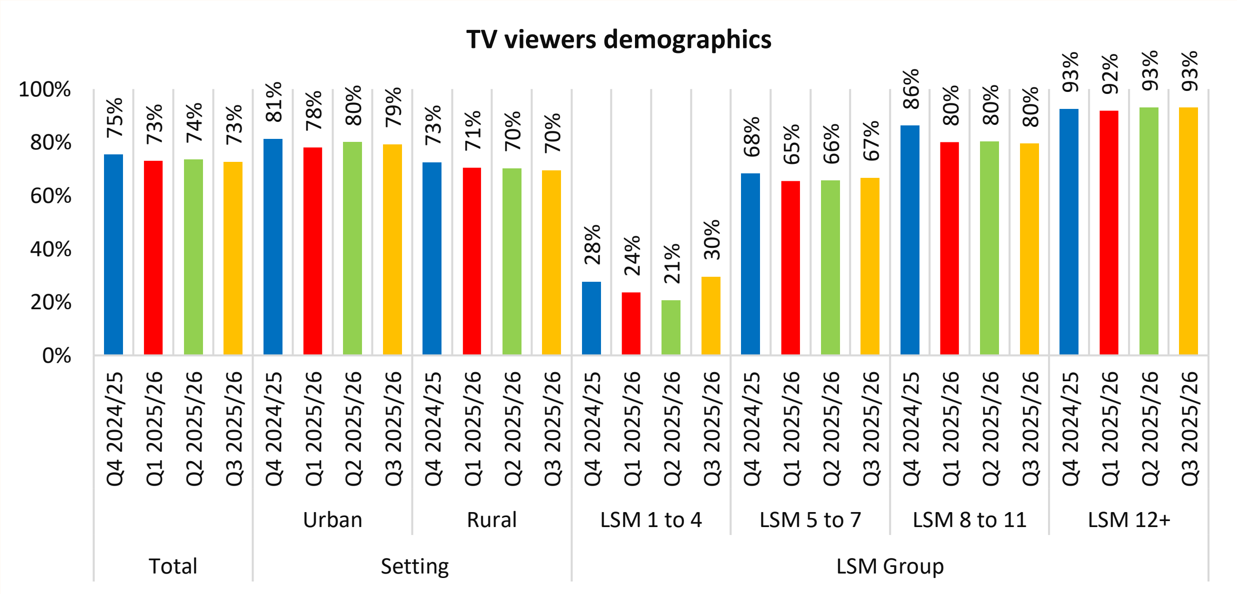
TV viewership is consistently higher among men than women across all four quarters. By age, the strongest engagement is seen among adults aged 25–34 years, while viewership declines noticeably among younger audiences aged 15–17 years.



N=32.23M: All Respondents

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

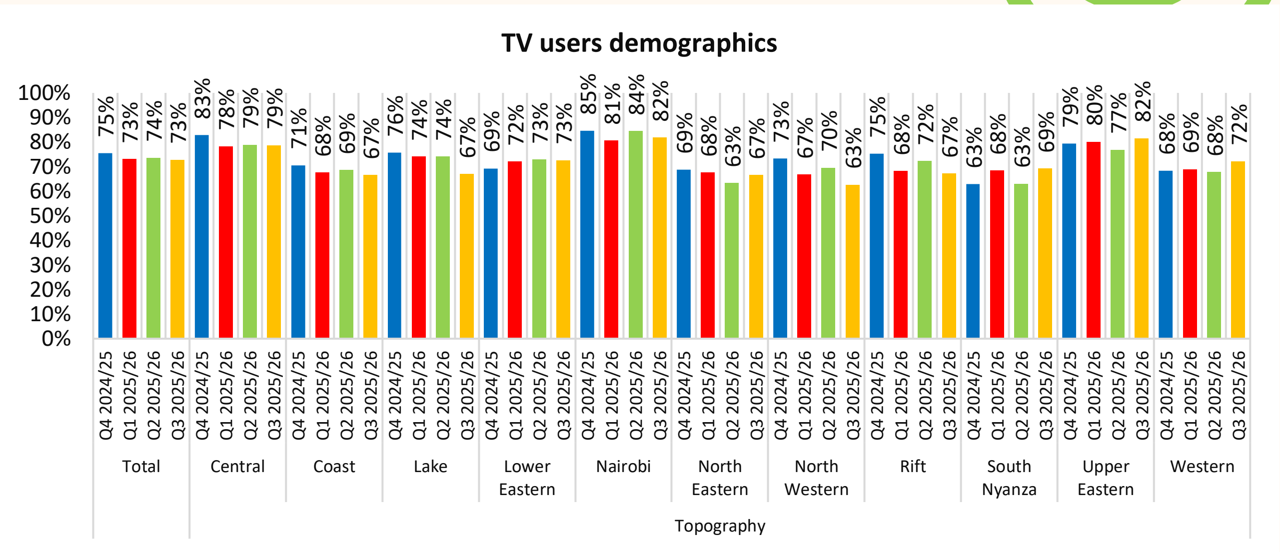
TV viewership is consistently higher in urban areas than in rural areas across all quarters. Differences are even more evident by socioeconomic status, with significantly lower viewership among LSM 1–4, likely due to limited access to television sets and electricity. In contrast, viewership is highest among LSM 12+, exceeding 90% in every quarter, followed closely by LSM 8–11.



N=32.23M: All Respondents

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

In Q3 2025/26, television viewership was highest in Nairobi and Upper Eastern (80%+), while North Eastern and Coast recorded the lowest uptake, with North Western and Western also trailing the national average, highlighting clear regional disparities in TV consumption.



N=32.23M: All Respondents

Figure 15: TV Viewership demographics – by total and topography

4.2. TV Genre Preference

TV viewership in Kenya is heavily concentrated around news and entertainment, with news leading as the most watched genre and entertainment/drama following closely. movies also command a notable share, driven by live and major events, while Sports, music, and soap operas attract moderate audiences. Other genres such as religious programming, educational content, talk shows, politics, and reality TV remain niche, indicating selective engagement. Overall, Kenyan audiences prioritize information and entertainment, with secondary genres adding diversity to viewing habits.

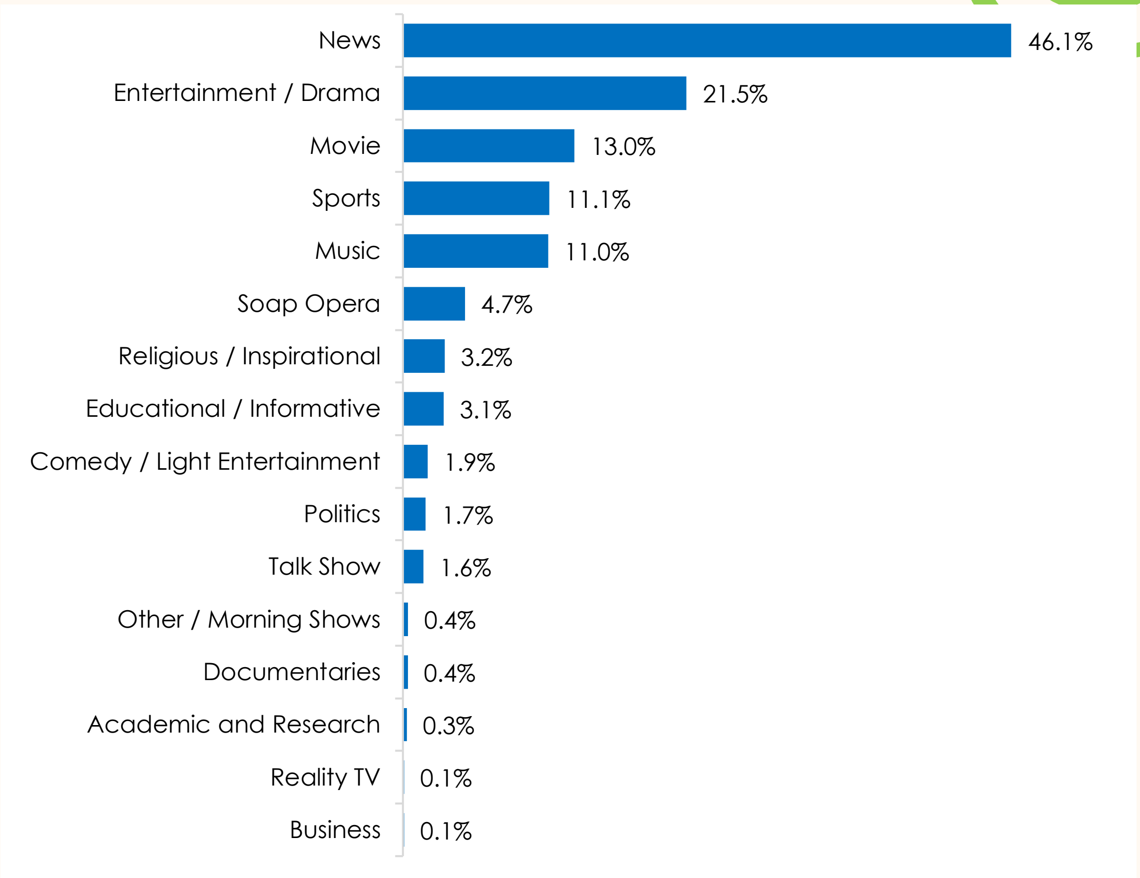
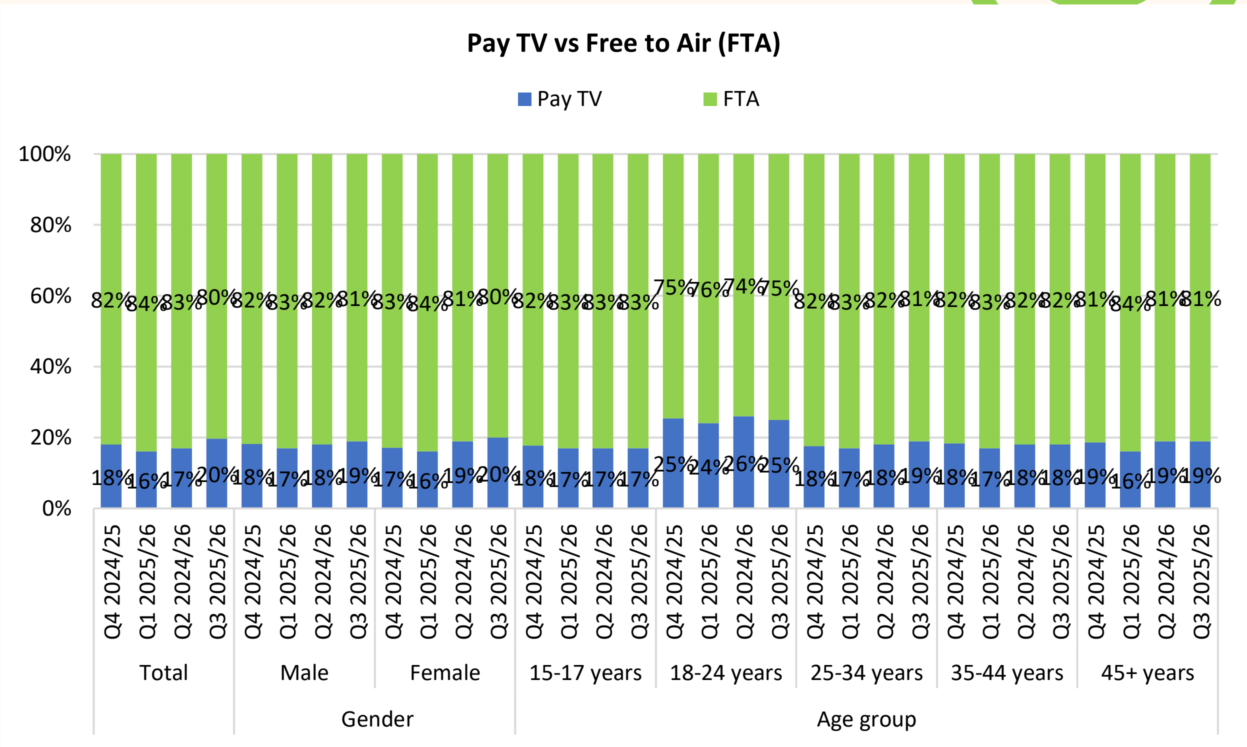


Figure 16: TV Genre Preference

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

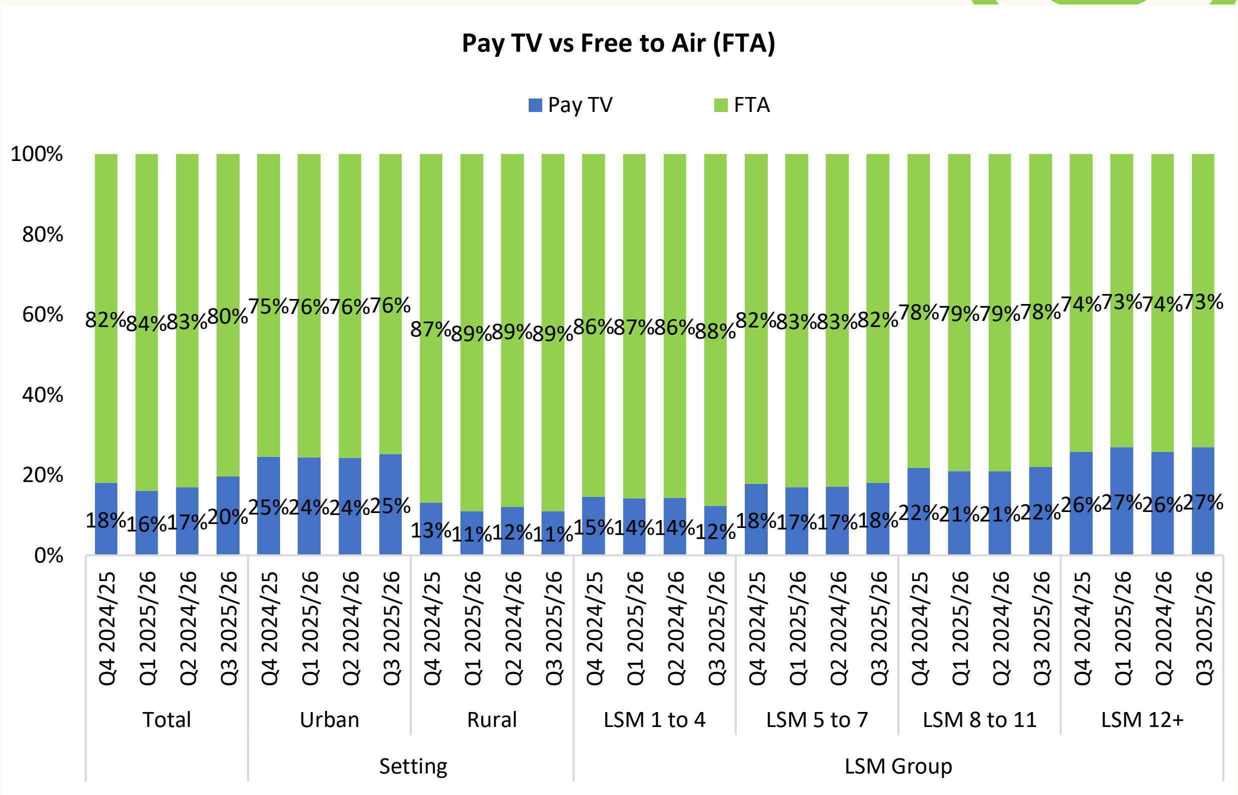
Free-to-air (FTA) television clearly dominates TV viewership in Kenya, attracting a much larger audience than Pay TV across the population. Viewing patterns show little difference between men and women, indicating broadly similar access and preferences by gender. However, Pay TV has relatively stronger penetration among younger audiences, particularly those aged 18–24 years, while its reach declines among older age groups. Overall, FTA remains the primary television platform, with Pay TV appealing more narrowly to younger segments.



n=24.3M: Average Daily TV Viewers

Figure 17: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 18: Pay TV vs Free to Air TV Reach - total and LSM

4.4. Exposure to impact of advertising

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

Advertising impact is strongest during the 7:00–10:00 PM window, when audience size and advertising activity peak simultaneously. To improve efficiency, advertisers can reduce spend during late-night and midday periods with lower engagement, and instead strengthen placements in the morning and early evening to achieve a better balance between reach and cost.

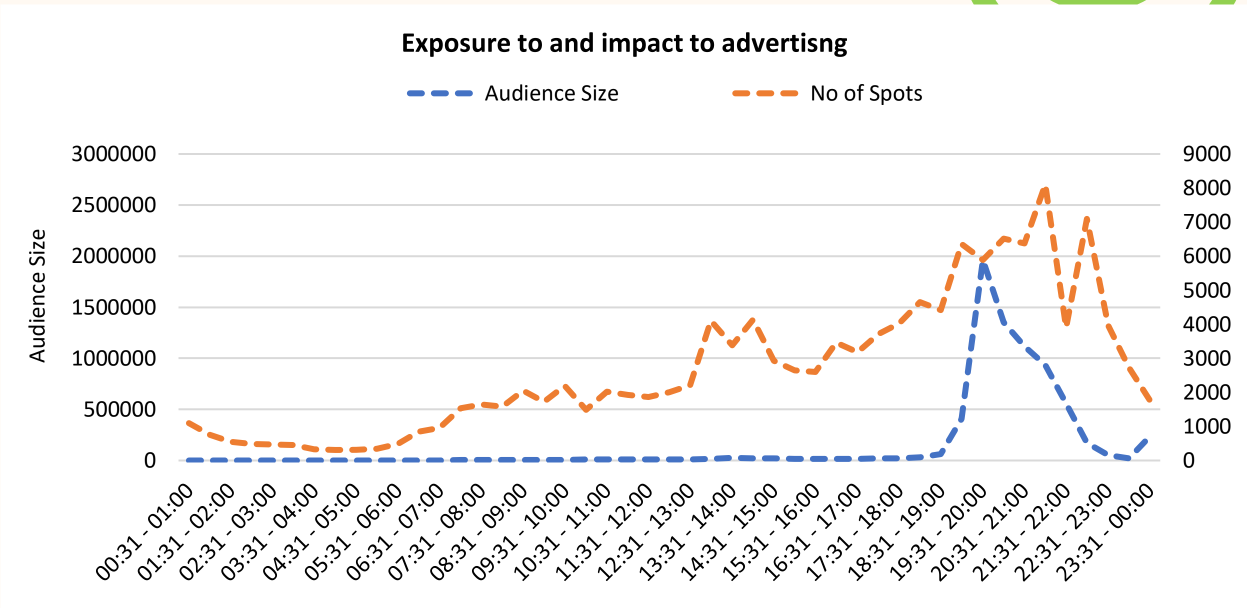
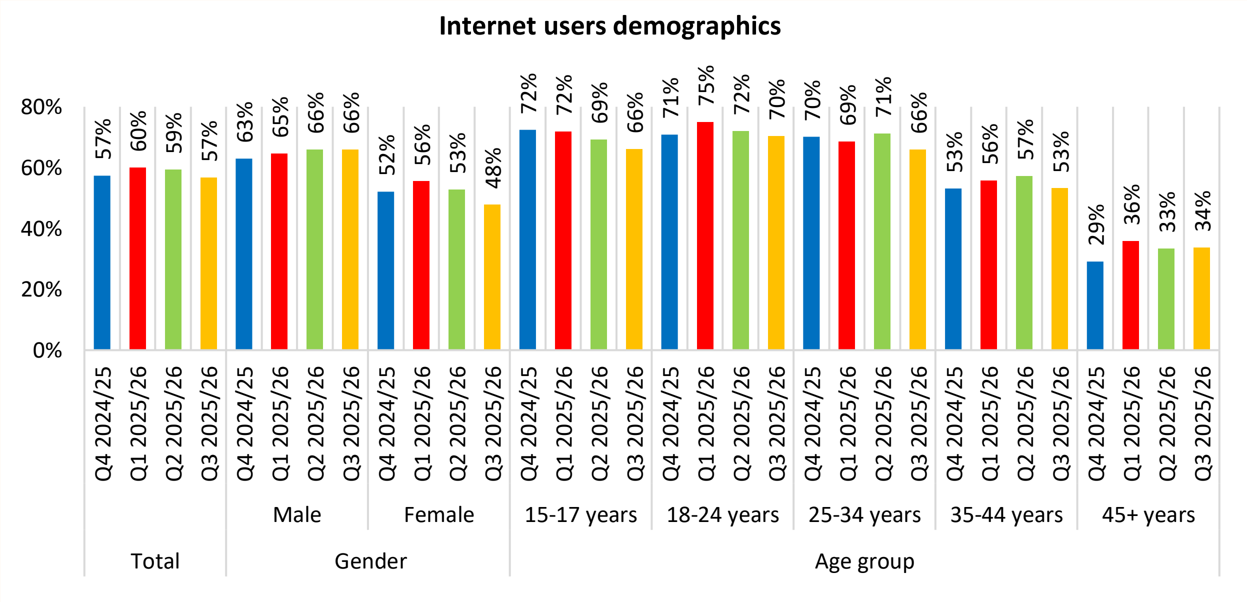


Figure 19: TV exposure to and impact to advertising

5. Internet Usage

5.1. Internet Access by Demographics

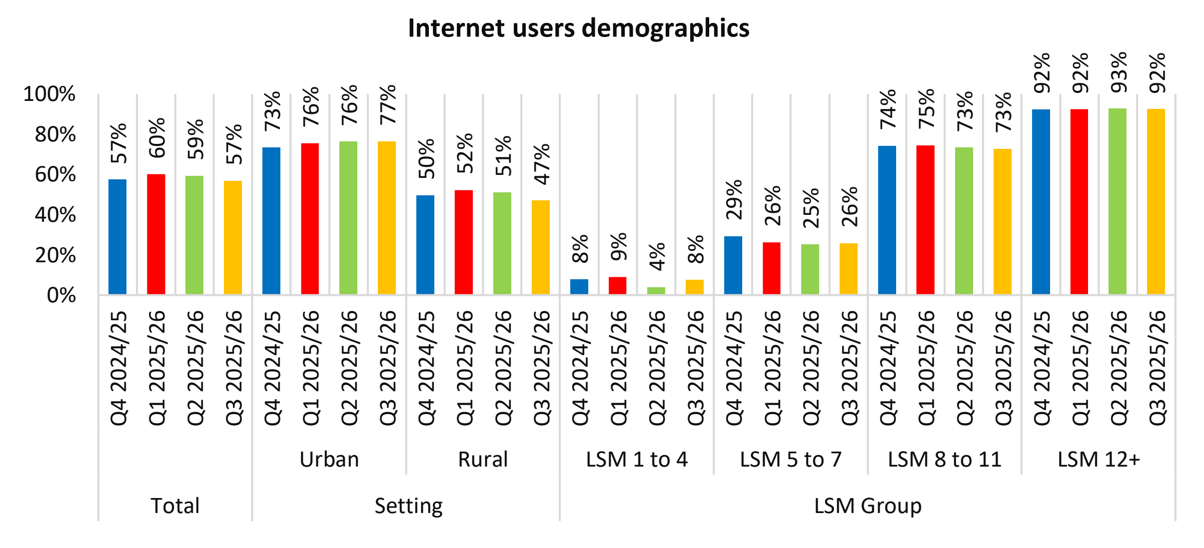
More than half of the people say they use the internet, with men consistently reporting higher usage than women in all quarters. Age also plays a key role in internet access: use is highest among young people aged 15–24 years, where more than 70% are online. Internet use then steadily decreases with age, with the lowest levels seen among those aged 45 years and above, where fewer than 40% report using the internet.



n=19.0M: Average Internet Users

Figure 20: Internet users' demographics – total, gender and age group

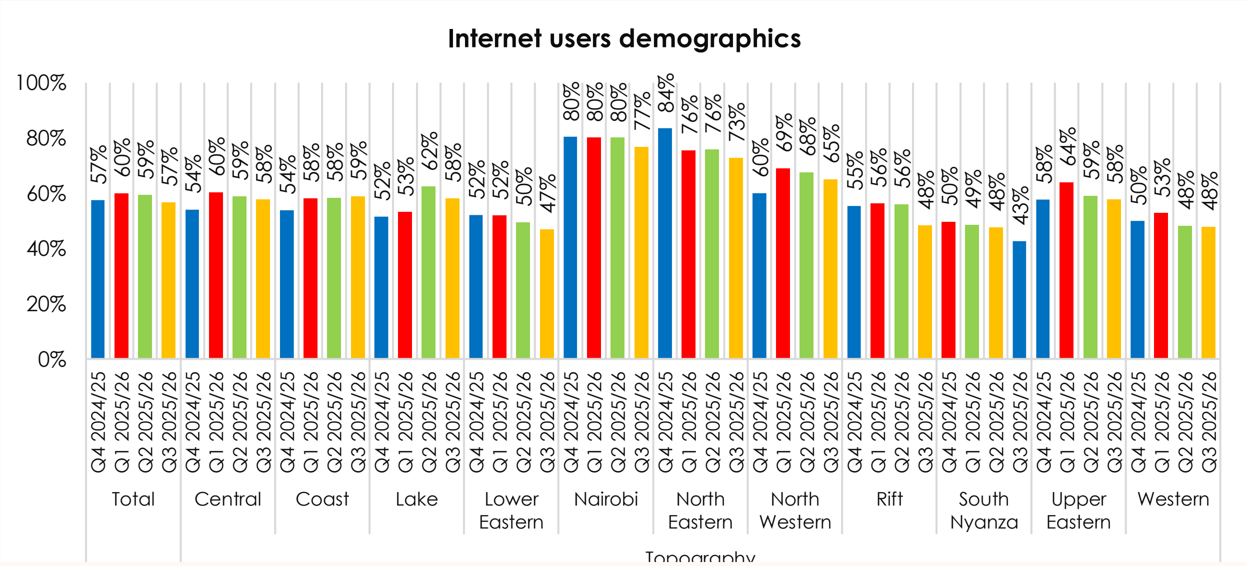
High internet access in Kenyan urban areas is largely due to strong digital infrastructure, including wide broadband coverage and reliable mobile networks. Urban residents also benefit from higher income levels and better access to digital devices, making it easier for them to adopt new technologies. In addition, internet use rises steadily with higher Living Standards Measure (LSM) levels, showing a clear connection between income, education, and digital participation in Kenya's evolving media landscape.



n=19.0M: Average Internet Users

Figure 21: Internet users' demographics – total, setting and LSM

Internet access varies widely across Kenya. Nairobi has the highest internet use, with North Eastern also showing relatively high access due to better infrastructure and more urban centres. On the other hand, Lower Eastern records the lowest levels of internet use, highlighting a clear digital gap linked to weaker infrastructure and lower economic capacity. Regions such as Coast, Rift Valley, and Western also have lower-than-average internet access.



n=19.0M: Average Internet Users

Figure 22: Internet users' demographics – total and topography

5.2. Devices Used

Most Kenyans rely on smartphones as their main means of accessing the internet, highlighting the central role these devices play in staying connected and accessing information. As mobile technology advances, expanding affordable access to smartphones remains crucial for strengthening digital inclusion and reducing connectivity gaps across different income levels and regions.

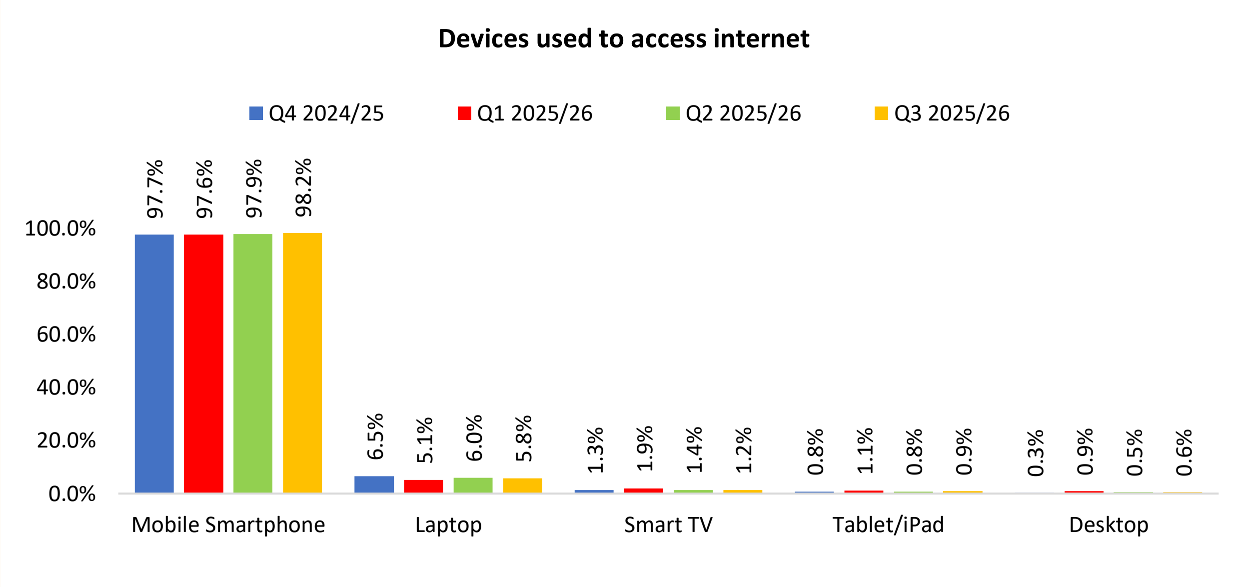


Figure 23:Devices used to access the internet

5.3. Social Media Platforms

Facebook and WhatsApp emerge as the most widely used social media platforms in Kenya, with TikTok and YouTube following closely behind. Their prominence reflects deep penetration and strong influence within Kenya's digital ecosystem, underscoring their central role in everyday communication and online engagement.

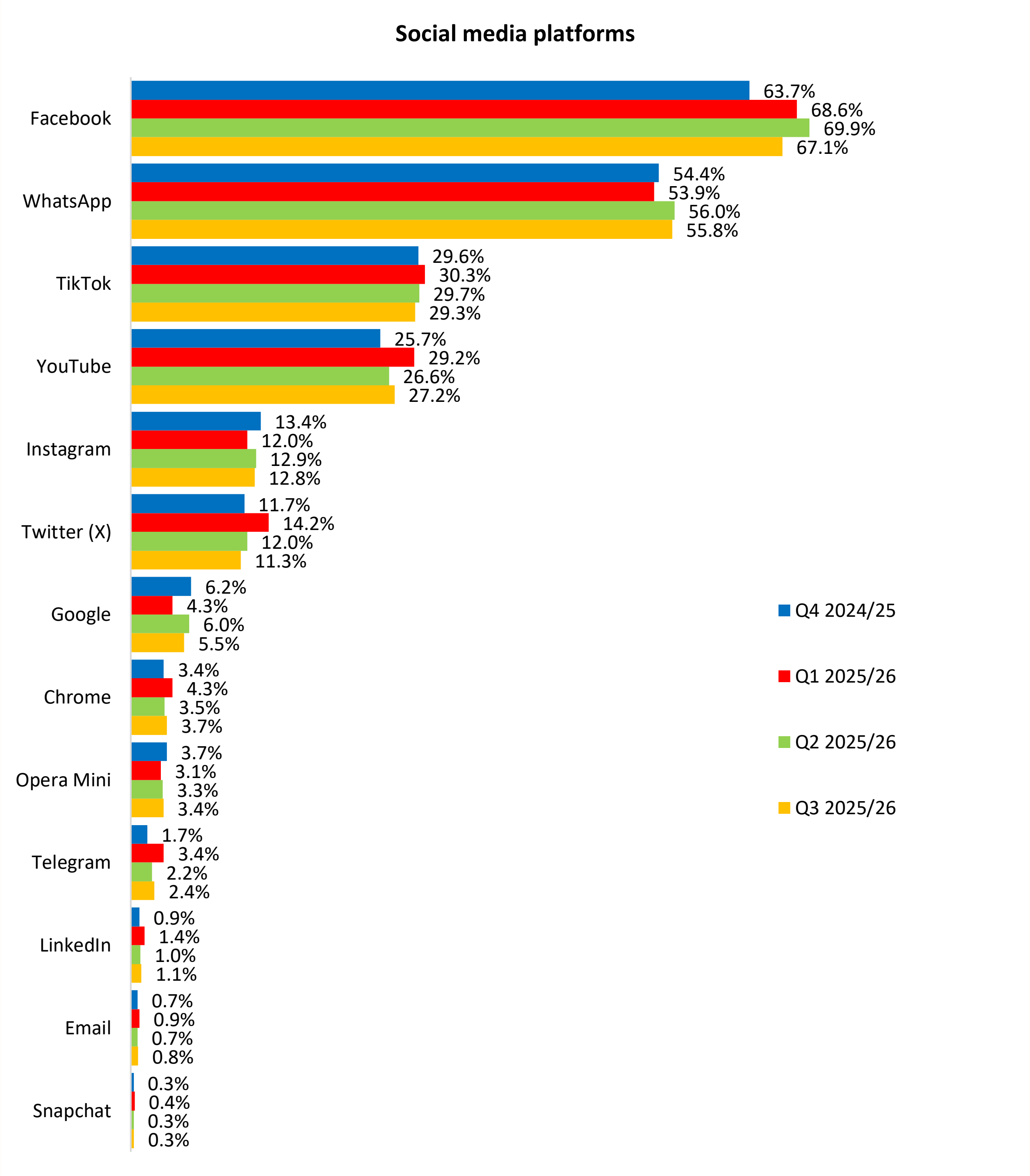
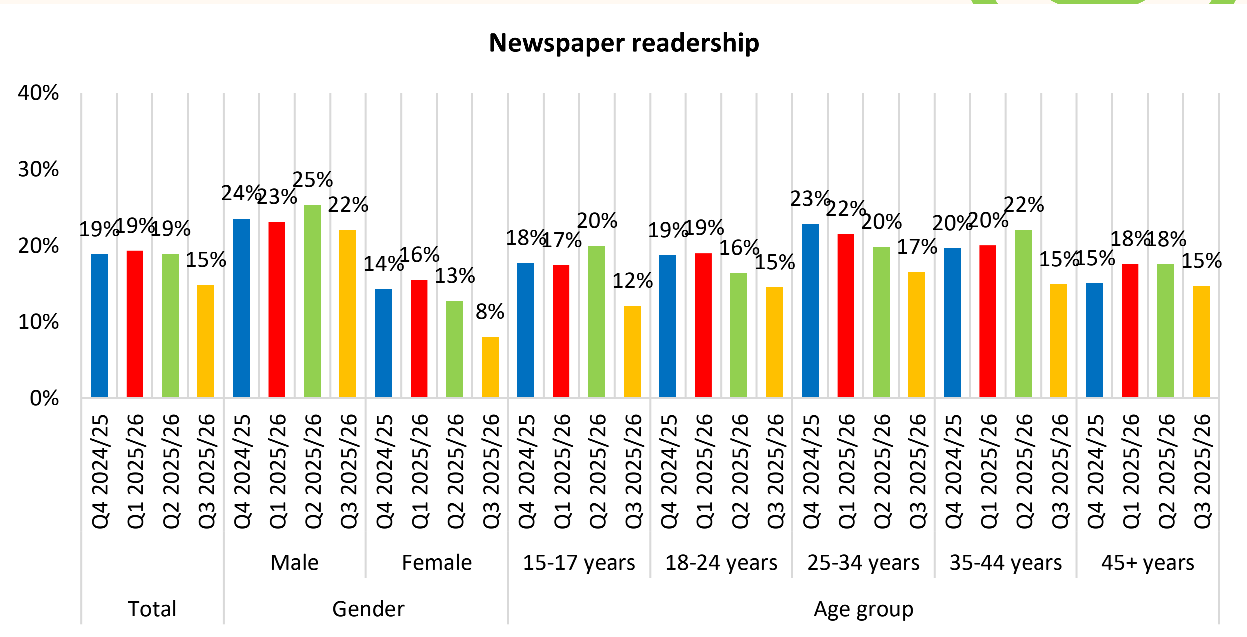


Figure 25: Popular social media platforms

6. Newspaper Readership

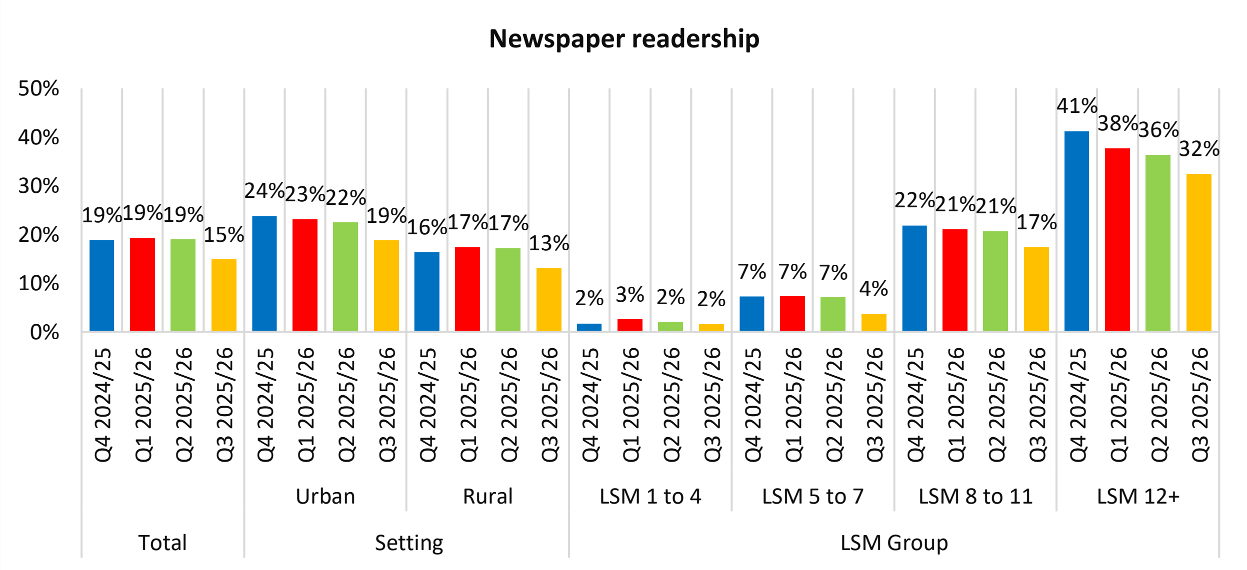
Newspaper reading in Kenya shows a noticeable difference between men and women, with men consistently reporting higher readership than women in all quarters. By age, people aged 25-34 years are the most active newspaper readers, recording the highest levels of readership. In contrast, newspaper reading is lower among teenagers aged 15-17 years and adults aged 45 years and above, suggesting that print media appeals most to young and mid-career adults.



n=32.2M: All Respondents

Figure 24: Newspaper readership demographics – by total, gender and age

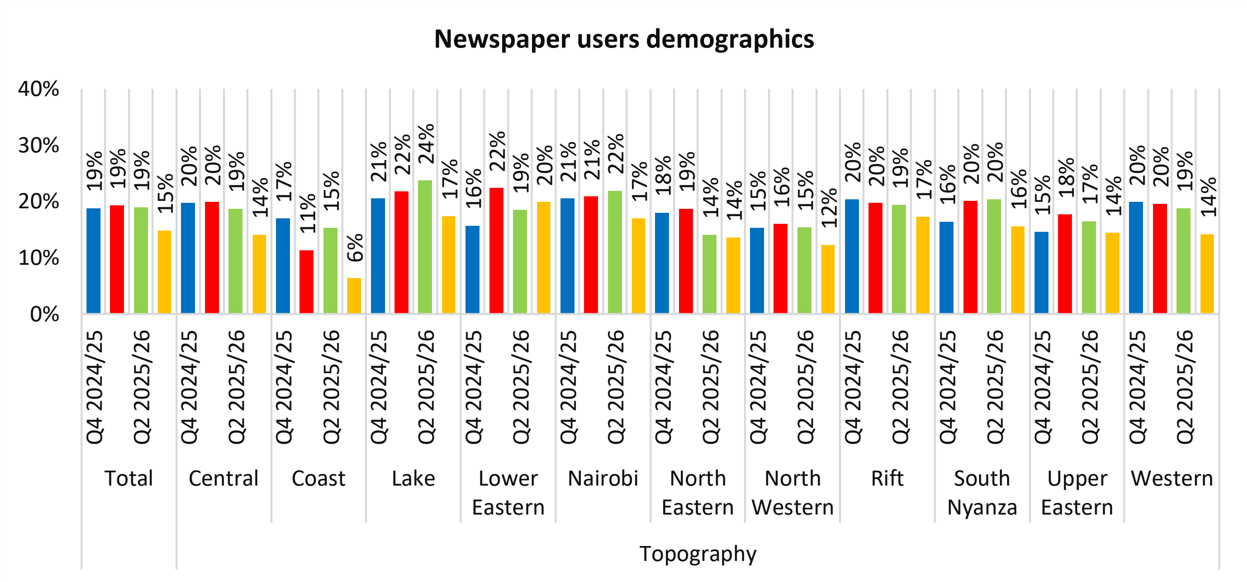
Newspaper readership in Kenya is significantly higher in urban areas compared to rural regions. Urban dwellers consistently show greater engagement with print media, reflecting better access to distribution channels and higher literacy levels.



n=32.2M: All Respondents

Figure 25: Newspaper readership demographics – by total, setting and LSM

In Q3 2025/26, newspaper readership is highest in the Lower Eastern and South Nyanza regions, both recording 20%, indicating relatively strong engagement with print media in these areas; this marks a recovery for South Nyanza, which had dipped to 16% in the previous quarter before rebounding, while most other regions show either stable or slightly declining readership, pointing to a generally soft but regionally varied newspaper consumption landscape.



n=32.2M: All Respondents

Figure 26: Newspaper readership demographics – by total and topography

7. Advertising Expenditure

7.1. Advertising Expenditure Overview

Overall advertising spend records a modest decline in the latest quarter, reflecting ongoing strategic adjustments in media investment amid evolving market conditions. While some sectors scaled back spending, others demonstrated resilience or growth, indicating a reallocation rather than a broad-based contraction.

Banking & Finance remains one of the most stable and dominant sectors, sustaining high investment levels across periods. Media & Publishing, despite fluctuations, continues to command significant spend, highlighting its central role in driving visibility. Notably, sectors such as Agriculture and Audio-Visual Equipment show strong growth, suggesting emerging or opportunistic investment areas.
Conversely, several traditionally strong sectors including Entertainment & Leisure, Servicing Companies, and Property record declines, pointing to tightening budgets or shifting campaign priorities. Telecommunications and Foods exhibit relative stability, reinforcing their importance in maintaining consistent market presence.

Table 7: Advertising Expenditure

SECTOR	Q4 2024/25	Q1 2025/26	Q2 2025/26	Q3 2025/26	CHANGE (Q3-Q2)
Media & Publishing & Advertising	2,926	2,082	3,271	1,864	-43.0%
Banking & Finance	2,357	2,798	2,709	2,342	-13.5%
Entertainment & Leisure	1,955	1,523	1,087	1,094	0.7%
Servicing Companies	1,302	2,204	1,598	1,878	17.5%
Telecommunication	953	2,083	2,243	1,295	-42.3%
Hygiene & Beauty Care	1,084	1,143	896	681	-24.0%
Foods	837	1,185	1,221	449	-63.2%
Property & Building & Acc.	853	1,203	875	619	-29.3%
Distribution	829	396	497	258	-48.0%
Transportation & Accessories	436	948	671	201	-70.0%
Agriculture & Gardening Equipment	751	153	218	540	147.8%
Non-Alcoholic Drinks	437	561	439	245	-44.3%
Medicine & Health Care	424	407	350	362	3.4%
Upkeep Products	258	210	240	223	-7.0%
Sport	-	415	181	96	-46.8%
Energy	82	216	265	63	-76.1%
Alcoholic Drinks	145	133	187	95	-49.3%
Office Supplies	38	255	93	28	-70.0%
Household Appliances	110	103	34	45	30.7%
Industrial Sector	-	156	239	74	-69.2%
Clothing & Accessories	104	56	138	30	-78.1%
Automotive	41	75	75	59	-21.4%
Audio.Video & Photo Equipments	1	18	49	176	257.7%
Furniture & Decoration	18	11	41	1	-97.7%
TOTAL AD SPENDS KSHS	**15,940**	**18,331**	**17,619**	**12,719**	**-27.8%**

Key: Figures in KES Millions (000,000)

TV has the greatest spending, with radio coming in second. On TV Media & Publishing & Advertising has highest spending while on radio is Banking & Finance. Servicing Companies have the highest spending in print.

Table 8: Advertising Expenditure for radio, TV & print

SECTOR	TV	Radio	Print	Total	Share of Spending (SOS)
Banking & Finance	1,038	1,097	208	2,342	18.4%
Servicing Companies	814	547	517	1,878	14.8%
Media & Publishing & Advertising	1,077	441	345	1,864	14.7%

Telecommunication	1,008	283	5	1,295	10.2%
Entertainment & Leisure	705	316	73	1,094	8.6%
Hygiene & Beauty Care	615	66	0	681	5.4%
Property & Building & Acc.	521	88	10	619	4.9%
Agriculture & Gardening Equipment	153	386	1	540	4.2%
Foods	314	134	0	449	3.5%
Medicine & Health Care	272	83	7	362	2.8%
Distribution	161	95	2	258	2.0%
Non-Alcoholic Drinks	90	155	0	245	1.9%
Upkeep Products	180	42	2	223	1.8%
Transportation & Accessories	74	118	10	201	1.6%
Audio. Video & Photo Equipment’s	173	3	0	176	1.4%
Sport	70	17	9	96	0.8%
Alcoholic Drinks	17	76	2	95	0.7%
Industrial Sector	3	61	10	74	0.6%
Energy	16	30	18	63	0.5%
Automotive	21	35	3	59	0.5%
Household Appliances	22	19	3	45	0.4%
Clothing & Accessories	21	8	1	30	0.2%
Office Supplies	4	20	5	28	0.2%
Furniture & Decoration	0	1	0	1	0.0%
Total Ad Spends Kshs	**7,368**	**4,121**	**1,231**	**12,719**	**100.0%**

Key: Figures in KES Millions (000,000)

7.2. Year to Date Advertising Trends

Media advertising spends across 2023 to early 2026 shows clear cyclical patterns, with television consistently leading despite periodic fluctuations. TV spend demonstrates strong peaks around late-year periods (particularly September–November), followed by notable slowdowns at the beginning of each year, reflecting budget resets and seasonal demand shifts.

Radio follows a similar but more moderate trajectory, maintaining stable investment levels with gradual increases toward the end of each year. Its peaks are less pronounced than television, reinforcing its role as a steady support medium rather than a primary driver of spend volatility.
Print remains the least invested medium throughout the period, with relatively flat trends and only minor fluctuations. While occasional slight increases are visible, it continues to play a limited, complementary role in the media mix.

A consistent pattern emerges across all years: spend tends to dip in the early months (January–February), recover through mid-year, and peak in the final quarter, before resetting again. The decline observed in early 2026 follows this established seasonal trend rather than indicating a structural shift.

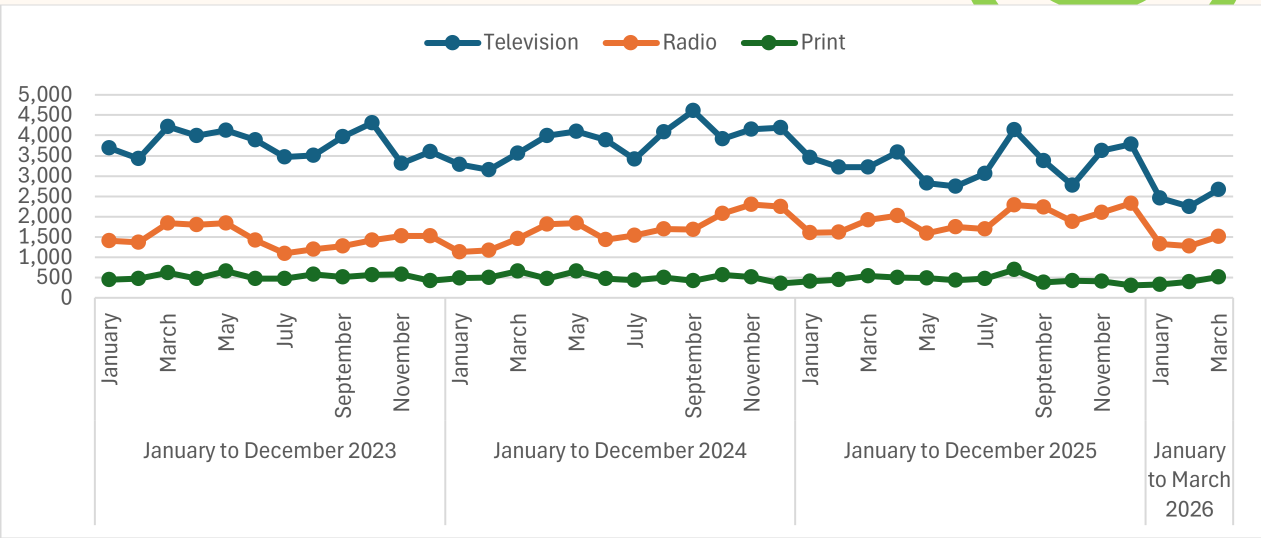


Figure 27: Advertising spends Jan 2023 to March 2026
Key: Figures in KES Millions (000,000)

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

Most advertising spend is concentrated on free-to-air television, underscoring its pivotal role in the media landscape. This strong focus reflects FTA TV's effectiveness in delivering broad reach and engaging a diverse audience across the market.

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	-
Q2 2025/26	October	2,772	1
	November	3,624	1
	December	3,778	2
Q3 2025/26	January	2,445	13
	February	2,246	2

	March	2,661	

Key: Figures in KES Millions (000,000)

7.4. TV Spends by Sector/Industry

Telecommunications and Banking continue to demonstrate strong and stable investment patterns, underscoring their reliance on television for broad audience engagement. Meanwhile, Media & Publishing, although still dominant, reflects some fluctuation, suggesting campaign-driven spending cycles.

Several sectors, including Entertainment & Leisure, Hygiene & Beauty Care, and Property, show a gradual decline over time, pointing to reduced spending intensity or shifts toward alternative channels. In contrast, Servicing Companies exhibit a recovery in Q3, indicating renewed campaign activity.

Overall, the trend reflects a more selective and efficiency-driven TV advertising landscape, where advertisers continue to prioritize high-impact sectors while optimizing budgets in response to evolving market dynamics.

Table 10: TV spends by sector/industry

Sector	Q4 2024/25	Q1 2025/26	Q2 2025/26	Q3 2025/26
Media & Publishing & Advertising	1694	1170	1945	1077
Telecommunication	698	1531	1578	1008
Banking & Finance	998	1259	1215	1038
Entertainment & Leisure	1424	1017	743	705
Hygiene & Beauty Care	989	983	755	615
Property & Building & Acc	631	950	638	521
Servicing Companies	319	790	642	814
Foods	513	777	756	314
Distribution	575	336	270	161
Medicine & Health Care	287	222	260	272
Transportation & Accessories	190	436	287	74
Upkeep Products	168	156	196	180
Non-Alcoholic Drinks	93	150	303	90
Agriculture & Gardening Equipment	370	61	32	153
Sport	0	304	108	70
Clothing & Accessories	43	53	127	21
Audio. Video & Photo Equipment's	0	17	36	173
Office Supplies	12	131	58	4
Energy	6	40	109	16
Alcoholic Drinks	52	51	48	17
Household Appliances	80	48	0	22
Industrial Sector	0	62	50	3
Automotive	11	19	5	21
Furniture & Decoration	0	0	15	0
Grand Total	**9,152**	**10,565**	**10,176**	**7,368**

Key: Figures in KES Millions (000,000)

7.5. Sector spends distribution on radio

Radio advertising spend shows a moderate decline in Q3 2025/26 following relatively stronger activity in earlier quarters, reflecting a cautious and more selective investment approach by advertisers. Despite this slowdown, Banking & Finance remains the dominant sector, consistently leading in spend and reinforcing radio's effectiveness for broad outreach and frequency-driven campaigns.

Servicing Companies and Media & Publishing continue to be key contributors, although Media & Publishing records a notable drop in Q3, suggesting reduced campaign intensity after a strong peak in the previous quarter. Telecommunications also shows a sharp decline, indicating a shift in channel strategy or reallocation of budgets.

In contrast, Agriculture & Gardening Equipment stands out with a strong rebound in Q3, pointing to seasonal or campaign-driven investment. Entertainment & Leisure maintains relatively stable spend levels, highlighting consistent engagement strategies within the sector.

Table 11: Advertising spend by sector for radio

Sector/ Industry	Q4 2024/25	Q1 2025/26	Q2 2025/26	Q3 2025/26
Banking & Finance	1,161	1,399	1,368	1,097
Servicing Companies	432	657	481	547
Media & Publishing & Advertising	725	492	1,008	441
Agriculture & Gardening Equipment	375	92	186	386
Entertainment & Leisure	445	389	293	316
Telecommunication	252	545	642	283
Non-Alcoholic Drinks	344	410	136	155
Foods	317	407	464	134
Transportation & Accessories	242	504	376	118
Distribution	248	54	211	95
Property & Building & Acc.	200	233	198	88
Medicine & Health Care	125	167	86	83
Alcoholic Drinks	91	77	131	76
Hygiene & Beauty Care	95	159	141	66
Industrial Sector	-	71	176	61
Upkeep Products	90	53	43	42
Automotive	24	50	69	35
Energy	68	172	138	30
Office Supplies	23	123	31	20
Household Appliances	27	53	28	19
Sport	-	102	58	17
Clothing & Accessories	60	3	11	8
Audio.Video & Photo Equipments	0	1	13	3

Key: Figures in KES Millions (000,000)

7.6. Sector spends distribution on Print

Print advertising is dominated by a few key sectors, particularly Servicing Companies and Media & Publishing, with Banking & Finance showing a recent uptick. Most other sectors record low and inconsistent spend, indicating limited reliance on print.

Table 12: Spend distribution by sector on print

SECTOR	Q4 2024/25	Q1 2025/26	Q2 2025/26	Q3 2025/26
Servicing Companies	552.3	756.8	475.7	516.9
Media & Publishing & Advertising	506.6	419.7	318.0	344.9
Banking & Finance	198.3	140.3	125.7	207.5
Entertainment & Leisure	85.6	116.9	50.9	73.2
Energy	7.4	4.1	17.5	17.6
Industrial Sector	0.0	22.8	13.3	10.3
Property & Building & Acc.	21.3	19.3	38.1	10.1
Transportation & Accessories	4.6	7.9	7.8	9.9
Sport	0.0	8.0	16.1	8.9
Medicine & Health Care	12.0	17.7	3.2	7.1
Telecommunication	3.2	7.9	23.6	4.6
Office Supplies	2.7	1.2	4.3	4.6
Household Appliances	2.8	1.9	6.3	3.3
Automotive	6.7	4.8	1.4	2.9
Distribution	5.4	5.9	15.3	2.5
Alcoholic Drinks	1.2	5.1	7.5	1.9
Upkeep Products	0.2	0.0	0.6	1.7
Agriculture & Gardening Equipment	5.5	0.3	0.0	1.2
Clothing & Accessories	0.5	0.0	0.1	0.9
Foods	7.3	1.0	0.6	0.5
Audio. Video & Photo Equipment's	0.7	0.0	0.5	0.0
Furniture & Decoration	3.9	3.3	2.2	0.0
Hygiene & Beauty Care	0.0	0.3	0.6	0.0
Non-Alcoholic Drinks	0.3	0.5	0.7	0.0

Key: Figures in KES Millions (000,000)

7.7. Overall Digital Spends Trends

In Q1 2025/26, digital advertising spends reached approximately KES 11.76 billion, reflecting a continued shift by Kenyan brands toward digital platforms. Spending rose steadily from July to September, peaking in September, driven largely by strong investment from the Banking and Finance sector. This growth highlights increasing confidence in digital channels for targeted reach and audience engagement.

However, this momentum softened in Q2 2025/26, with a noticeable decline in spend through October to December, indicating a slowdown in campaign intensity. In Q3 2025/26, the market shows signs of recovery, with gradual month-on-month growth from January to March, suggesting renewed advertiser activity and budget reallocation toward digital.

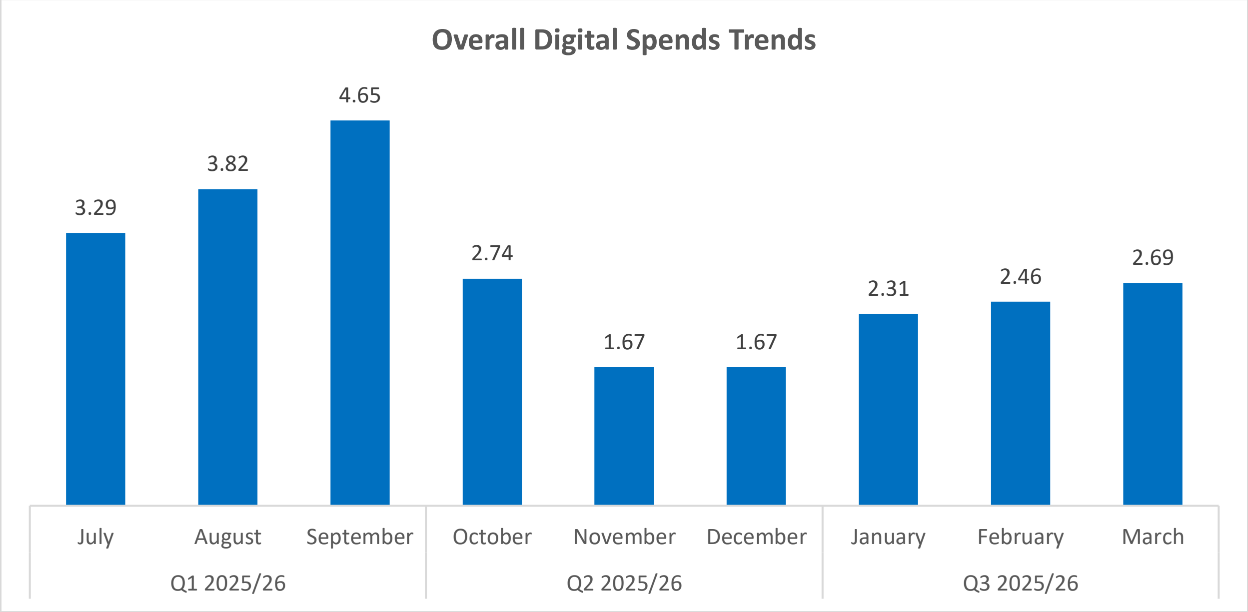


Figure 28: Overall Digital Spends Trends
Key: Figures in KES Billions (000,000,000)

7.8. Top Digital Channels

Digital advertising spend is heavily concentrated on Meta platforms, which together account for nearly four-fifths of total digital investment, confirming their position as the most preferred channels among advertisers. Facebook remains the single largest platform despite a slight decline from Q1 to Q2 2025/26, while Instagram also retains a substantial share, reinforcing Meta's dominance.

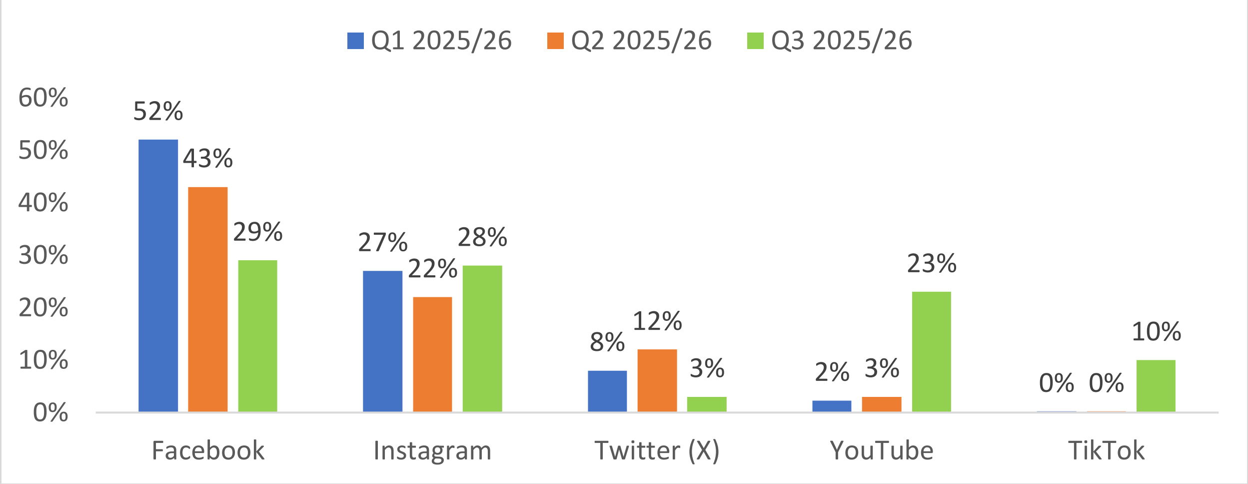


Figure 29: Top Digital Channels

8. CHALLENGES AND OPPORTUNITIES FOR THE BROADCASTING INDUSTRY IN KENYA

Challenges in the Broadcasting Industry in Kenya

❖ **Intensifying Competition from Digital-First Players**

Broadcasters are facing heightened competition from global digital platforms and content creators who operate with lower costs and more flexible distribution models. Platforms such as social media and streaming services are attracting younger audiences, weakening traditional TV and radio's appeal among key demographic segments.

❖ **Declining Advertising Share for Traditional Media**

While television and radio still command substantial reach, there is a gradual shift of advertising budgets towards digital channels due to better targeting, measurability, and performance tracking. This has created revenue pressures for traditional broadcasters, particularly smaller stations.

❖ **Content Relevance and Changing Consumer Preferences**

Audiences are increasingly demanding personalized, on-demand, and interactive content. Traditional broadcasting formats, which are largely linear and scheduled, are struggling to keep pace with evolving consumption habits, especially among urban and younger audiences.

❖ **High Cost Structures and Operational Pressures**

Broadcasting remains a capital-intensive industry, with significant costs related to content production, licensing, transmission infrastructure, and talent. These costs are rising even as revenues become more uncertain, squeezing profitability.

❖ **Measurement and Attribution Gaps**

Limited integration between traditional audience measurement systems and digital analytics creates challenges in demonstrating full audience reach and campaign effectiveness to advertisers. This weakens the competitiveness of broadcasters in an increasingly data-driven advertising ecosystem.

❖ **Fragmentation of Audiences Across Platforms**

The rapid growth of digital and social media platforms has significantly fragmented audiences, reducing the dominance of traditional broadcasting channels. Viewers and listeners are increasingly consuming content across multiple platforms, making it difficult for broadcasters to retain consistent audience share and loyalty.

Opportunities in the Broadcasting Industry in Kenya

- **Growth of Hybrid Media Consumption**

The coexistence of traditional and digital media presents an opportunity for broadcasters to adopt hybrid models; integrating TV, radio, and digital platforms to extend reach and deepen engagement. Multi-platform distribution can help broadcasters remain relevant across diverse audience segments.

- **Expansion of Digital and Online Broadcasting Channels**

Broadcasters can leverage digital platforms such as streaming services, mobile apps, podcasts, and social media to diversify content delivery and attract younger, digitally native audiences. This creates new monetization avenues beyond traditional advertising.

- **Strong Continued Reach of Free-to-Air (FTA) and Radio**

Despite digital disruption, FTA television and radio continue to offer unmatched mass reach, particularly in rural and peri-urban areas. This positions broadcasters as critical platforms for national communication, public information, and mass advertising campaigns.

- **Local Content Advantage**

Kenyan broadcasters have a strong opportunity to capitalize on locally relevant content, including vernacular programming, cultural storytelling, and locally produced entertainment. This remains a key differentiator against global digital platforms.

- **Data-Driven Content and Advertising Strategies**

The increasing availability of audience data presents an opportunity for broadcasters to refine programming, optimize scheduling, and offer more targeted advertising solutions. Integrating audience insights across platforms can enhance competitiveness with digital media.

- **Strategic Partnerships and Content Syndication**

Collaborations with telecom companies, digital platforms, and content producers can expand distribution and unlock new revenue streams. Partnerships can also support innovation in content formats and delivery mechanisms.