COMMUNICATIONS AUTHORITY OF KENYA

# *AUDIENCE MEASUREMENT AND INDUSTRY TRENDS REPORT*

***August 2026***

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## 1. INTRODUCTION

Kenya has one of the most advanced and dynamic media sectors in Sub-Saharan Africa, combining a strong traditional broadcasting industry with a rapidly growing digital ecosystem. Radio remains one of the most accessible media channels, with more than 200 stations broadcasting in English, Kiswahili, and vernacular languages, while television continues to play a major role in news, entertainment, education, sports, and public communication.

The migration to digital terrestrial television in 2015 increased the number of available channels, improved signal quality, and strengthened competition among broadcasters. Free-to-Air television remains influential because of its national reach, while radio continues to provide affordable, frequent, and localized communication, particularly through vernacular stations.

The expansion of affordable smartphones and 3G, 4G, and 5G networks has accelerated internet use and changed how Kenyans consume media. Audiences increasingly move between television, radio, websites, streaming services, podcasts, and social media platforms such as Facebook, WhatsApp, Instagram, X, YouTube, and TikTok. TikTok has become especially popular among younger audiences because of its short-form, interactive, and highly shareable video content.

Advertising expenditure reflects this mixed media environment. Television and radio remain important for mass reach and local targeting, while digital advertising is growing because it offers precise audience targeting, measurable performance, and interactive engagement. Platforms such as Google, Meta, YouTube, and TikTok are therefore attracting a growing share of advertising budgets.

These changes are placing pressure on media houses to diversify revenue, adapt content for multiple platforms, and invest in digital transformation. Reliable and independent audience measurement is essential to help regulators, media owners, and advertisers understand audience behaviour, allocate resources effectively, improve programming, and support the sustainable growth of Kenya's 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.

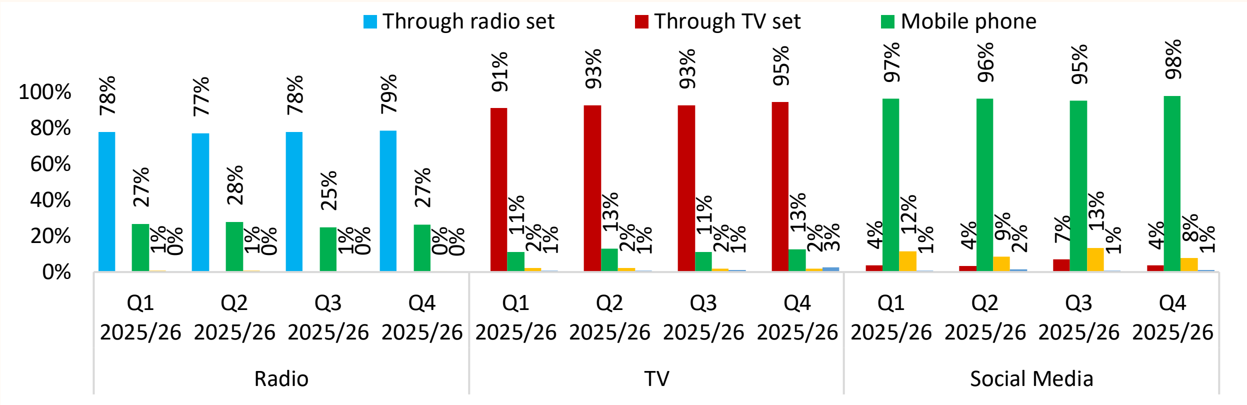



Figure 1: Ways in which media is consumed by total

### 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 | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Q1 2025/26 | Q2 2025/26 | Q3 2025/26 | Q4 2025/26 | Q1 2025/26 | Q2 2025/26 | Q3 2025/26 | Q4 2025/26 | Q1 2025/26 | Q2 2025/26 | Q3 2025/26 | Q4 2025/26 |
| At own home | 90% | 89% | 87% | 90% | 87% | 89% | 86% | 87% | 90% | 89% | 88% | 88% |
| Place of work | 3% | 4% | 8% | 4% | 3% | 3% | 12% | 3% | 4% | 4% | 4% | 4% |
| Bar/Restaurant/Hotel | 6% | 2% | 5% | 3% | 2% | 4% | 3% | 3% | 8% | 6% | 7% | 6% |
| Someone else's household | 1% | 3% | 3% | 2% | 2% | 2% | 3% | 2% | 3% | 1% | 3% | 2% |
| Bus/Taxi/Matatu | 1% | 1% | 1% | 1% | 2% | 2% | 2% | 2% | 0% | 0% | 0% | 0% |
| In car - Private | 2% | 1% | 0% | 1% | 2% | 2% | 1% | 2% | 0% | 0% | 0% | 0% |
| On the move | 1% | 0% | 2% | 1% | 1% | 1% | 3% | 1% | 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 increasing slightly from 73% in Q1 2025/26 to 75% in Q4 2025/26, while television remained broadly stable at 73%-74%. These marginal quarter-to-quarter movements reinforce the continued dominance of both platforms in regular media consumption.

Internet usage showed a modest softening, declining from 60% in Q1 2025/26 to 57% in Q3 2025/26, before remaining stable at 57% in Q4 2025/26. Despite this slight decline, internet remained the third most widely accessed medium, reaching well over half of the population.

In contrast, print media continued to record substantially lower levels of access. Newspaper readership declined from 19% in Q1 and Q2 2025/26 to 15% in Q3, before recovering slightly to 17% in Q4 2025/26. Magazine consumption remained the lowest, moving from 7% in Q1 and Q2 to 5% in Q3, followed by a slight recovery to 6% in Q4 2025/26. Overall, the latest quarter points to continued stability in radio and television, steady internet usage, and a modest recovery in print media following Q3 declines.

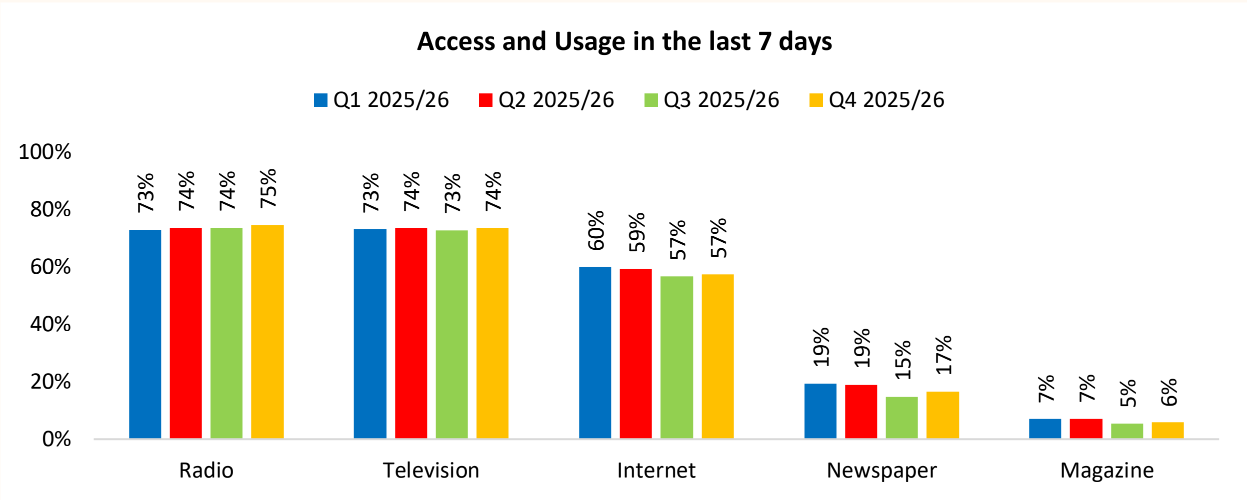



Figure 2: Access and Usage of media by total

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.

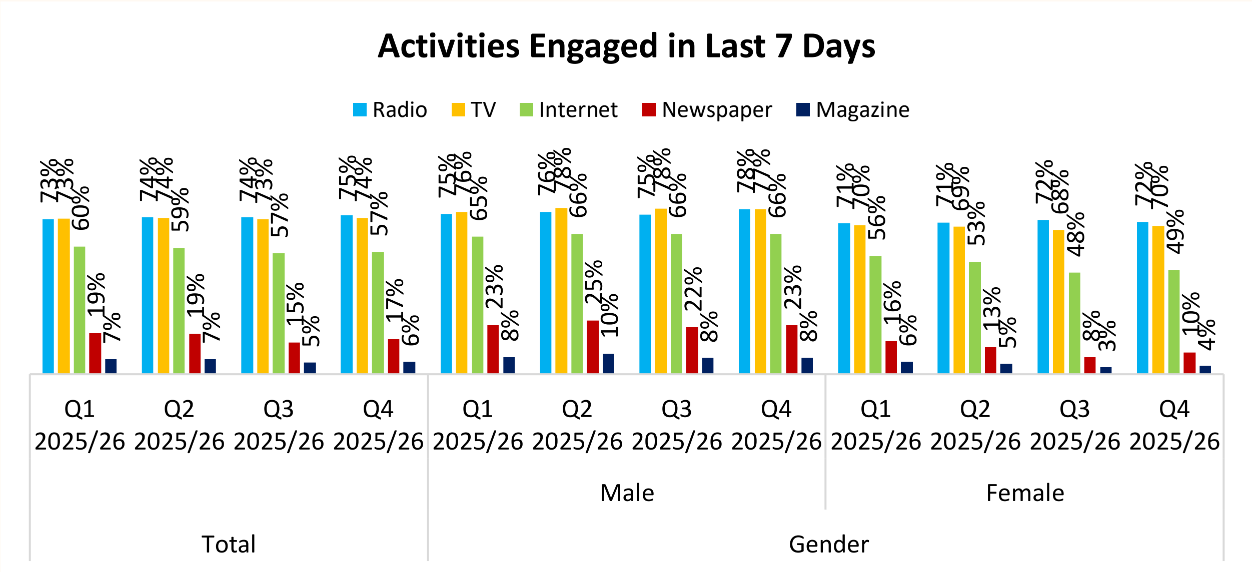



Figure 3: Activities Engaged in Last 7 Days - by total & gender

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** | | Q1 2025/26 | 73% | 73% | 60% | 19% | 7% |
| | | Q2 2025/26 | 74% | 74% | 59% | 19% | 7% |
| | | Q3 2025/26 | 74% | 73% | 57% | 15% | 5% |
| | | Q4 2025/26 | 75% | 74% | 57% | 17% | 6% |
| **LSM Group** | LSM 1 to 4 | Q1 2025/26 | 90% | 24% | 9% | 3% | 2% |
| | | Q2 2025/26 | 95% | 21% | 4% | 2% | 1% |
| | | Q3 2025/26 | 93% | 30% | 8% | 2% | 1% |
| | | Q4 2025/26 | 94% | 24% | 7% | 1% | 1% |
| | LSM 5 to 7 | Q1 2025/26 | 76% | 65% | 26% | 7% | 3% |
| | | Q2 2025/26 | 75% | 66% | 25% | 7% | 3% |
| | | Q3 2025/26 | 81% | 67% | 26% | 4% | 2% |
| | | Q4 2025/26 | 74% | 69% | 29% | 6% | 2% |
| | LSM 8 to 11 | Q1 2025/26 | 72% | 80% | 75% | 21% | 7% |
| | | Q2 2025/26 | 72% | 80% | 73% | 21% | 6% |
| | | Q3 2025/26 | 70% | 80% | 73% | 17% | 5% |
| | | Q4 2025/26 | 72% | 83% | 75% | 20% | 6% |
| | LSM 12+ | Q1 2025/26 | 63% | 92% | 92% | 38% | 15% |
| | | Q2 2025/26 | 65% | 93% | 93% | 36% | 17% |
| | | Q3 2025/26 | 60% | 93% | 92% | 32% | 13% |
| | | Q4 2025/26 | 68% | 94% | 93% | 35% | 15% |

In Q4 2025/26, radio and television remained the most accessed media nationally, at 75% and 74% respectively. Radio usage was highest in Western, while television was strongest in Nairobi. Internet access peaked in North Eastern and Nairobi, newspaper readership was highest in Lake and Rift, and magazine consumption remained low across all regions.

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

| | Quarter | Radio | TV | Internet | Newspaper | Magazine |
|---|---|---|---|---|---|---|
| **Total** | Q1 2025/26 | 73% | 73% | 60% | 19% | 7% |
| | Q2 2025/26 | 74% | 74% | 59% | 19% | 7% |
| | Q3 2025/26 | 74% | 73% | 57% | 15% | 5% |
| | Q4 2025/26 | 75% | 74% | 57% | 17% | 6% |
| **Central** | Q1 2025/26 | 71% | 78% | 60% | 20% | 5% |
| | Q2 2025/26 | 74% | 79% | 59% | 19% | 6% |
| | Q3 2025/26 | 71% | 79% | 58% | 14% | 4% |
| | Q4 2025/26 | 75% | 78% | 56% | 16% | 4% |
| **Coast** | Q1 2025/26 | 71% | 68% | 58% | 11% | 5% |
| | Q2 2025/26 | 68% | 69% | 58% | 15% | 5% |
| | Q3 2025/26 | 65% | 67% | 59% | 6% | 2% |
| | Q4 2025/26 | 68% | 66% | 58% | 12% | 4% |
| **Lake** | Q1 2025/26 | 83% | 74% | 53% | 22% | 9% |
| | Q2 2025/26 | 82% | 74% | 62% | 24% | 9% |
| | Q3 2025/26 | 83% | 67% | 58% | 17% | 5% |
| | Q4 2025/26 | 81% | 77% | 63% | 21% | 6% |
| **Lower Eastern** | Q1 2025/26 | 83% | 72% | 52% | 22% | 12% |
| | Q2 2025/26 | 83% | 73% | 50% | 19% | 13% |
| | Q3 2025/26 | 83% | 73% | 47% | 20% | 11% |
| | Q4 2025/26 | 80% | 76% | 50% | 18% | 10% |
| **Nairobi** | Q1 2025/26 | 60% | 81% | 80% | 21% | 7% |
| | Q2 2025/26 | 63% | 84% | 80% | 22% | 6% |
| | Q3 2025/26 | 60% | 82% | 77% | 17% | 5% |
| | Q4 2025/26 | 63% | 84% | 75% | 19% | 5% |
| **North Eastern** | Q1 2025/26 | 30% | 68% | 76% | 19% | 3% |
| | Q2 2025/26 | 34% | 63% | 76% | 14% | 2% |
| | Q3 2025/26 | 30% | 67% | 73% | 14% | 1% |
| | Q4 2025/26 | 45% | 58% | 79% | 8% | 3% |
| **North Western** | Q1 2025/26 | 61% | 67% | 69% | 16% | 6% |
| | Q2 2025/26 | 59% | 70% | 68% | 15% | 4% |
| | Q3 2025/26 | 65% | 63% | 65% | 12% | 3% |
| | Q4 2025/26 | 65% | 71% | 62% | 12% | 3% |
| **Rift** | Q1 2025/26 | 82% | 68% | 56% | 20% | 7% |
| | Q2 2025/26 | 81% | 72% | 56% | 19% | 8% |

| | | | | | | |
|---|---|---|---|---|---|---|
| | Q3 2025/26 | 85% | 67% | 48% | 17% | 8% |
| | Q4 2025/26 | 80% | 72% | 51% | 20% | 9% |
| **South Nyanza** | Q1 2025/26 | 79% | 68% | 49% | 20% | 8% |
| | Q2 2025/26 | 80% | 63% | 48% | 20% | 8% |
| | Q3 2025/26 | 82% | 69% | 43% | 16% | 6% |
| | Q4 2025/26 | 81% | 64% | 48% | 18% | 4% |
| **Upper Eastern** | Q1 2025/26 | 76% | 80% | 64% | 18% | 6% |
| | Q2 2025/26 | 79% | 77% | 59% | 17% | 7% |
| | Q3 2025/26 | 79% | 82% | 58% | 14% | 9% |
| | Q4 2025/26 | 79% | 73% | 57% | 13% | 10% |
| **Western** | Q1 2025/26 | 81% | 69% | 53% | 20% | 8% |
| | Q2 2025/26 | 81% | 68% | 48% | 19% | 7% |
| | Q3 2025/26 | 83% | 72% | 48% | 14% | 6% |
| | Q4 2025/26 | 83% | 70% | 47% | 16% | 6% |

## 2.4. Number of Media Consumed

In Q4 2025/26, the share of individuals consuming only one media platform increased to 28%, indicating a slight shift toward more concentrated media use. Consumption of two media platforms remained relatively high at 37%, despite a marginal decline from the previous quarter. Meanwhile, multiple media consumption (three or more platforms) declined further to 35%, suggesting a continued reduction in more diversified media use.

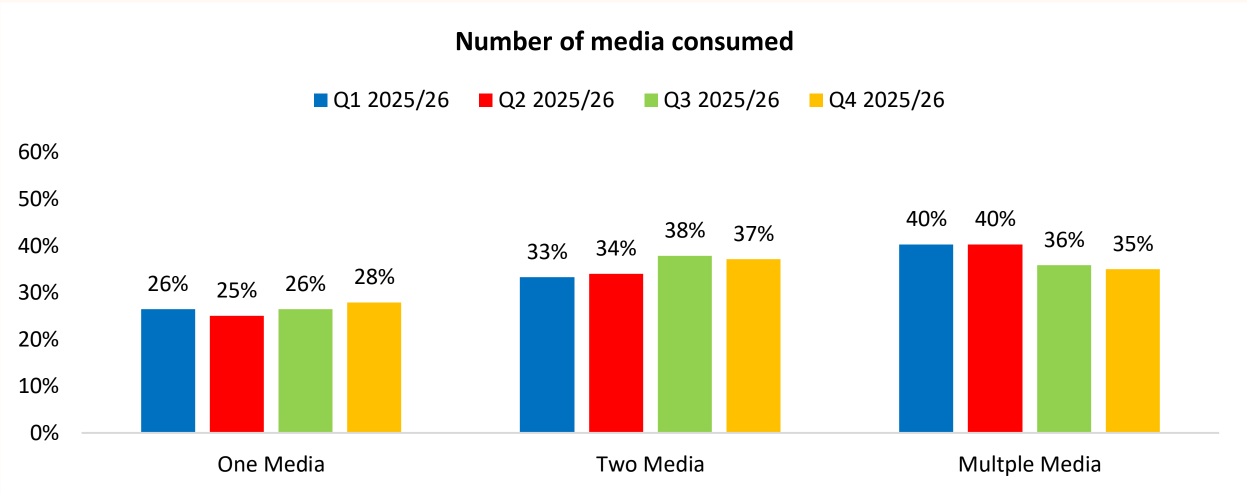



Figure 4: Number of media consumed by total

## 2.5. Type of Media Consumed

Across the four quarters, media consumption patterns continued to show a strong preference for multi-platform engagement. The radio–TV–online combination remained the most common, rising sharply from 20.3% in Q3 to 29.6% in Q4 2025/26. Single-platform consumption also increased for radio-only users to 16.4% and TV-only users to 7.4%, while online-only usage declined further to 4.1%.

Combinations involving print media continued to decline, with radio–TV–print falling to 0.8% and other print-related combinations remaining negligible. Overall, the findings reinforce the central role of radio, television, and online platforms in Kenya's media consumption landscape, with Q4 showing a notable increase in combined use of all three platforms.

Table 4: Combination of media Consumed by total

| Type of Media Consumed | Q1 2025/26 | Q2 2025/26 | Q3 2025/26 | Q4 2025/26 |
|---|---|---|---|---|
| **Radio+TV+Online** | 20.8% | 20.7% | 20.3% | 29.6% |
| **Radio+TV** | 14.7% | 15.5% | 18.1% | 17.8% |
| **Radio Only** | 14.5% | 14.8% | 15.9% | 16.4% |
| **All Media** | 11.9% | 12.0% | 13.1% | 13.3% |
| **TV+Online** | 6.5% | 6.1% | 6.0% | 7.4% |
| **TV Only** | 5.0% | 4.3% | 5.5% | 5.6% |
| **Online Only** | 5.3% | 5.4% | 4.5% | 4.1% |
| **Radio+Online** | 13.1% | 13.6% | 10.3% | 4.0% |
| **Radio+TV+Print** | 3.1% | 3.2% | 2.4% | 0.8% |
| **TV+Print+Online** | 2.3% | 2.0% | 2.1% | 0.5% |
| **Print+Online** | 0.5% | 0.4% | 0.3% | 0.2% |
| **Radio+Print** | 0.7% | 0.7% | 0.4% | 0.1% |
| **Radio+Print+Online** | 0.9% | 0.8% | 0.7% | 0.1% |
| **TV+Print** | 0.4% | 0.4% | 0.4% | 0.1% |
| **Print Only** | 0.0% | 0.0% | 0.0% | 0.0% |

## 2.6. Frequency of Media Consumption

In Q4 2025/26, daily media consumption remained strongest for television and radio, at 52% and 49% respectively, underscoring their continued importance in everyday media habits. Social media daily use increased significantly to 44%, indicating stronger engagement compared to previous quarters. In contrast, online video streaming declined to 28% daily use, while newspaper consumption remained largely infrequent, with 84% rarely or never reading newspapers.

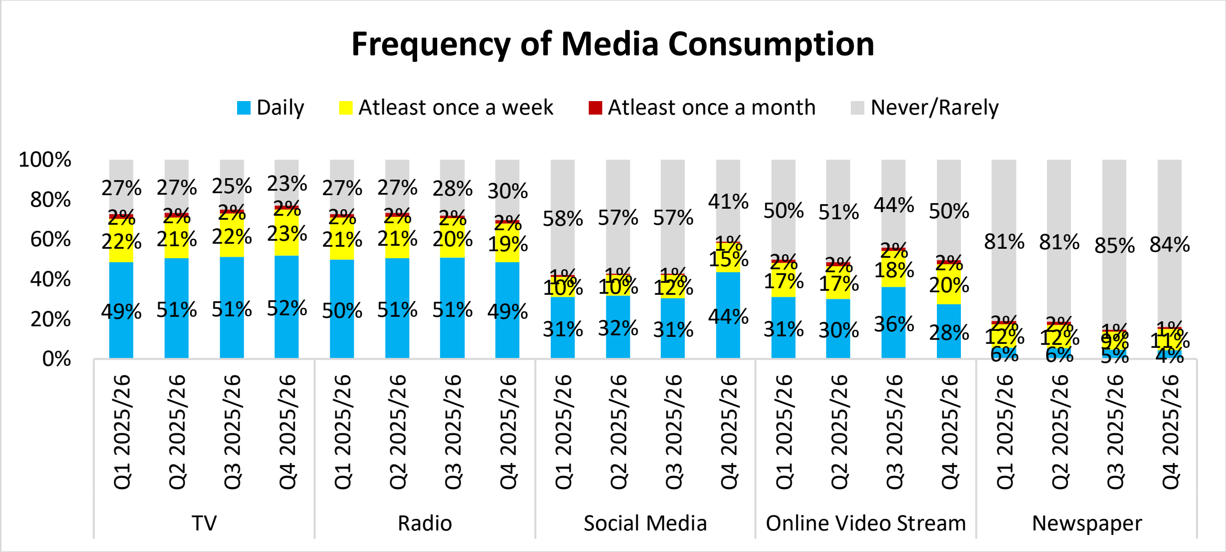



Figure 5: Frequency of consuming Tv, radio, social media, online streams and newspapers

## 2.7. Demographics of Media Consumers Profiles

In Q4 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 | | Quarter | Radio Listeners, n=24.4M | TV Viewers, n=24.1M | Newspaper Readership, n=5.4M | Online Usage, n=18.8M |
|---|---|---|---|---|---|---|
| Gender | Male | Q1 2025/26 | 51% | 51% | 59% | 53% |
| | | Q2 2025/26 | 51% | 52% | 66% | 55% |
| | | Q3 2025/26 | 50% | 53% | 73% | 57% |

| | | | | | | |
|---|---|---|---|---|---|---|
| | | Q4 2025/26 | 51% | 52% | 68% | 57% |
| | Female | Q1 2025/26 | 49% | 49% | 41% | 47% |
| | | Q2 2025/26 | 49% | 48% | 34% | 45% |
| | | Q3 2025/26 | 50% | 47% | 27% | 43% |
| | | Q4 2025/26 | 49% | 48% | 32% | 44% |
| | | | | | | |
| Age group | 15-17 years | Q1 2025/26 | 11% | 11% | 11% | 14% |
| | | Q2 2025/26 | 11% | 12% | 12% | 14% |
| | | Q3 2025/26 | 11% | 11% | 9% | 14% |
| | | Q4 2025/26 | 11% | 11% | 9% | 14% |
| | 18-24 years | Q1 2025/26 | 20% | 22% | 22% | 27% |
| | | Q2 2025/26 | 21% | 22% | 19% | 26% |
| | | Q3 2025/26 | 20% | 22% | 21% | 27% |
| | | Q4 2025/26 | 20% | 23% | 20% | 28% |
| | 25-34 years | Q1 2025/26 | 24% | 26% | 27% | 28% |
| | | Q2 2025/26 | 23% | 25% | 26% | 29% |
| | | Q3 2025/26 | 24% | 25% | 27% | 28% |
| | | Q4 2025/26 | 25% | 25% | 31% | 29% |
| | 35-44 years | Q1 2025/26 | 19% | 18% | 18% | 16% |
| | | Q2 2025/26 | 18% | 18% | 20% | 17% |
| | | Q3 2025/26 | 19% | 18% | 18% | 16% |
| | | Q4 2025/26 | 19% | 17% | 17% | 15% |
| | 45+ years | Q1 2025/26 | 27% | 24% | 23% | 15% |
| | | Q2 2025/26 | 27% | 24% | 23% | 14% |
| | | Q3 2025/26 | 26% | 25% | 25% | 15% |
| | | Q4 2025/26 | 25% | 24% | 23% | 14% |
| | | | | | | |
| Setting | Urban | Q1 2025/26 | 29% | 35% | 40% | 42% |
| | | Q2 2025/26 | 29% | 36% | 39% | 42% |
| | | Q3 2025/26 | 28% | 36% | 41% | 44% |
| | | Q4 2025/26 | 29% | 36% | 39% | 42% |
| | Rural | Q1 2025/26 | 71% | 65% | 60% | 59% |
| | | Q2 2025/26 | 71% | 64% | 61% | 58% |
| | | Q3 2025/26 | 72% | 64% | 59% | 56% |
| | | Q4 2025/26 | 71% | 64% | 61% | 58% |
| LSM Group | LSM 1 to 4 | Q1 2025/26 | 14% | 4% | 1% | 2% |
| | | Q2 2025/26 | 13% | 3% | 1% | 1% |
| | | Q3 2025/26 | 16% | 5% | 1% | 2% |
| | | Q4 2025/26 | 16% | 4% | 1% | 2% |
| | LSM 5 to 7 | Q1 2025/26 | 24% | 21% | 9% | 10% |

| | | | | | | |
|---|---|---|---|---|---|---|
| | | Q2 2025/26 | 23% | 20% | 8% | 10% |
| | | Q3 2025/26 | 27% | 23% | 6% | 11% |
| | | Q4 2025/26 | 26% | 25% | 9% | 13% |
| | LSM 8 to 11 | Q1 2025/26 | 45% | 50% | 49% | 56% |
| | | Q2 2025/26 | 46% | 51% | 50% | 57% |
| | | Q3 2025/26 | 42% | 48% | 51% | 56% |
| | | Q4 2025/26 | 43% | 50% | 55% | 59% |
| | LSM 12+ | Q1 2025/26 | 18% | 26% | 41% | 32% |
| | | Q2 2025/26 | 18% | 26% | 40% | 33% |
| | | Q3 2025/26 | 16% | 24% | 42% | 31% |
| | | Q4 2025/26 | 15% | 21% | 35% | 27% |

## 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.

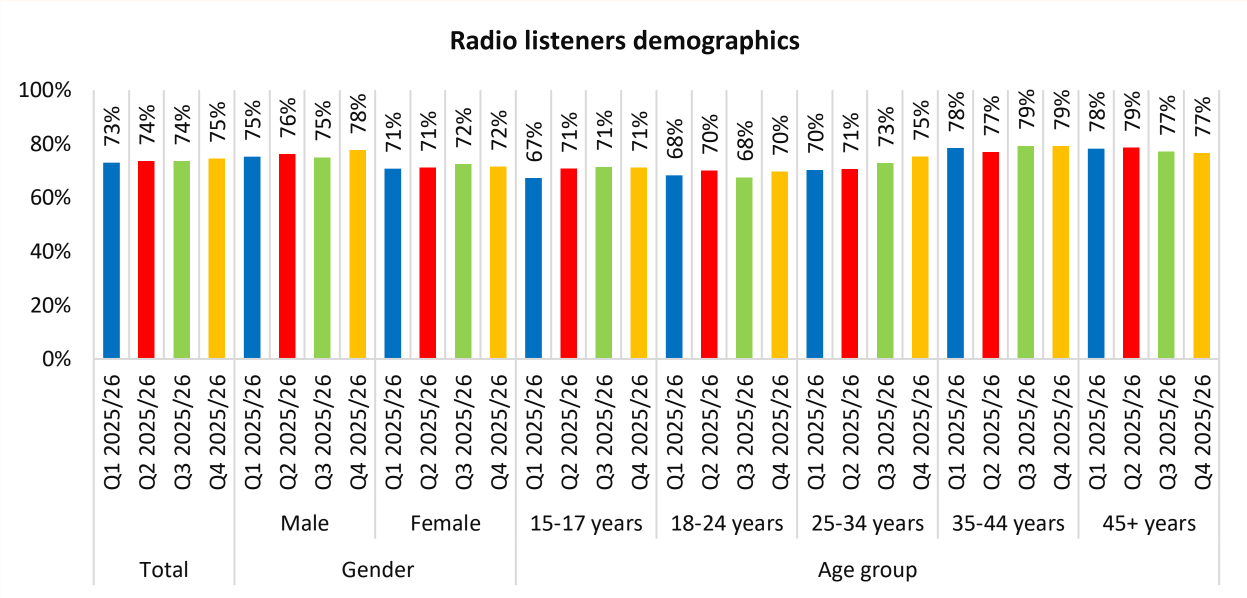



Figure 6: Demographics of radio consumers– by total, gender & age group

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.

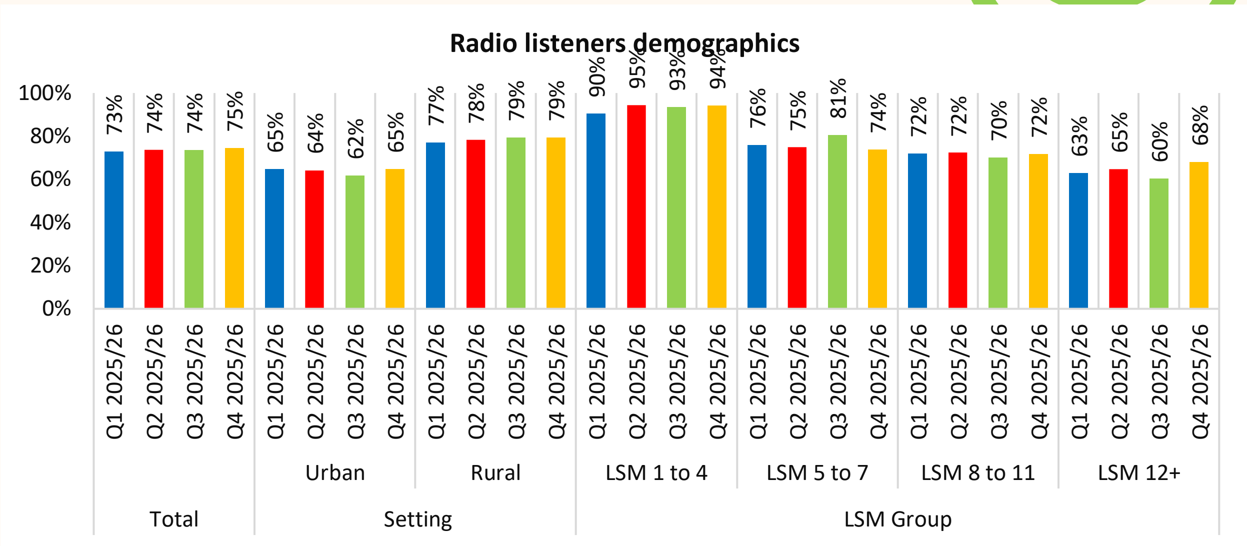



Figure 7: Demographics of radio consumers– by total, setting and LSM

In Q4 2025/26, radio listenership was highest in Western and Rift (83%), followed by Lake (81%) and Lower Eastern (80%). North Eastern recorded the lowest listenership at 45%, despite a notable increase from Q3, while Nairobi and North Western also remained below the national average, highlighting continued regional disparities in radio consumption.

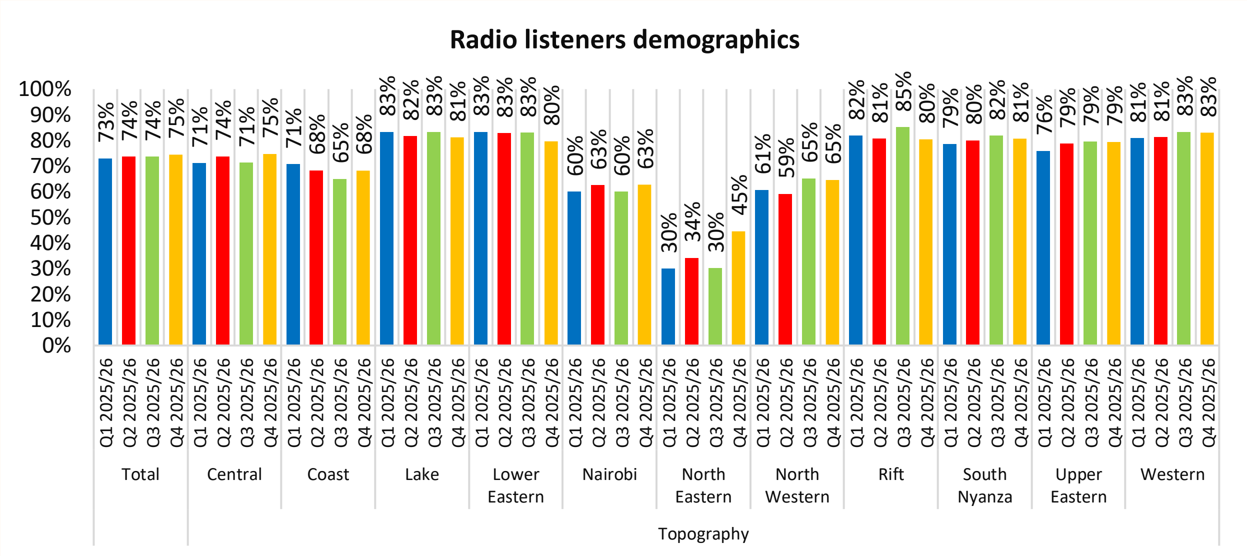



Figure 8: Demographics of radio consumers– by total, Topography

### 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.

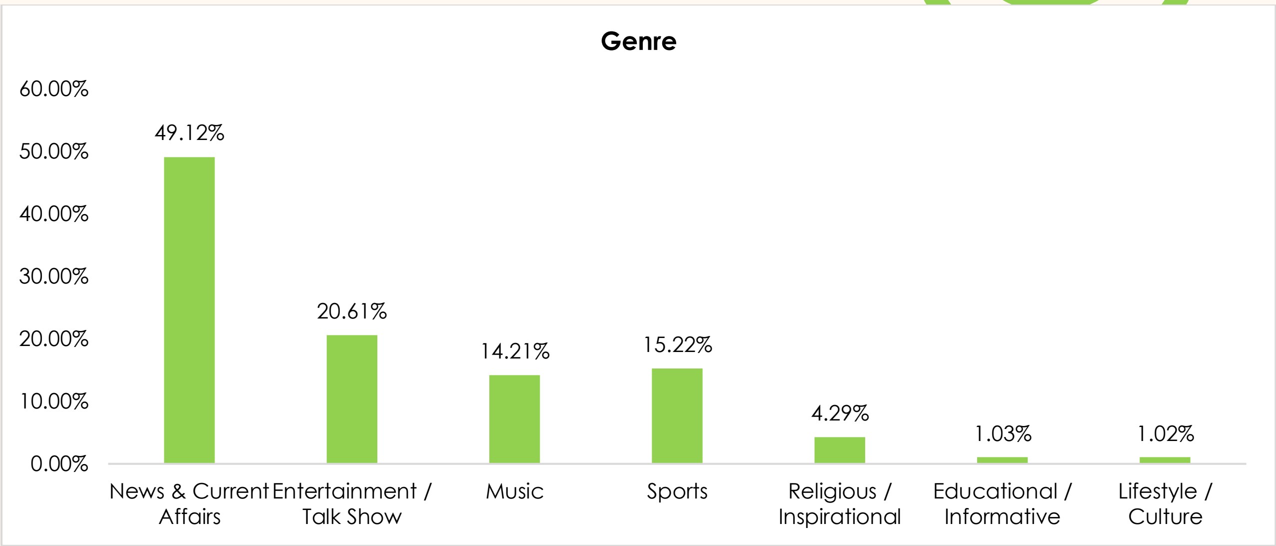



Figure 9: Radio Genre Preference

### 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.

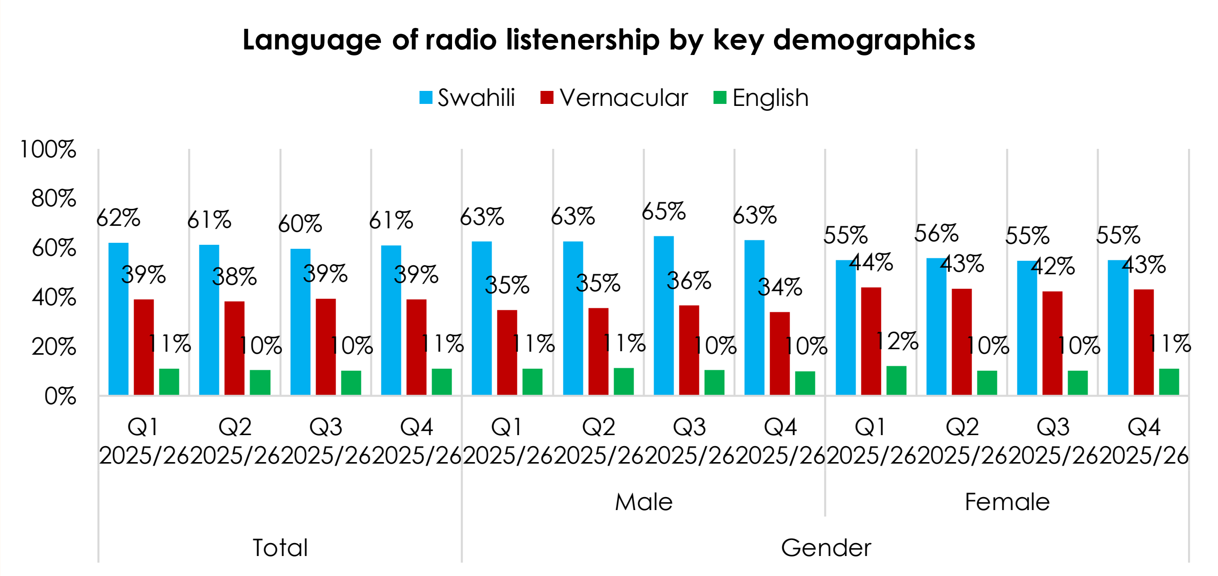



Figure 10: Radio listenership language by total and gender

Swahili continues to be the main language used for radio listening in both urban and rural areas across all quarters. Vernacular stations remain more widely listened to in rural areas than in urban settings. In contrast, urban listeners show a stronger preference for English-language stations, with consistently higher listenership than in rural areas, though the gap has narrowed slightly over time.

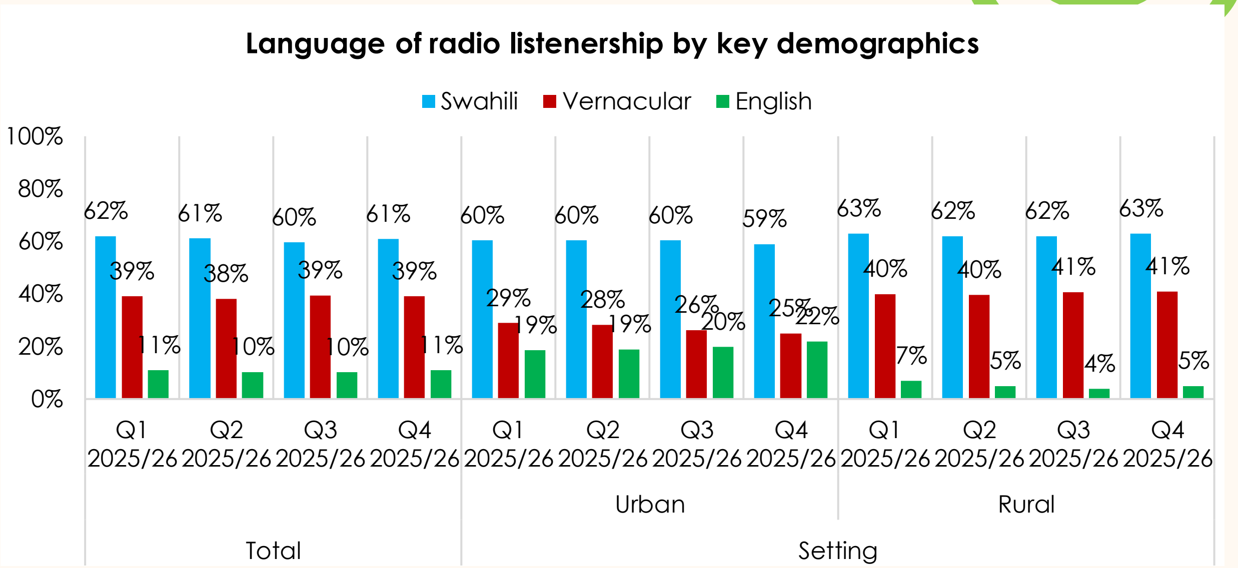



Figure 11: Radio listenership language by total & setting

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.

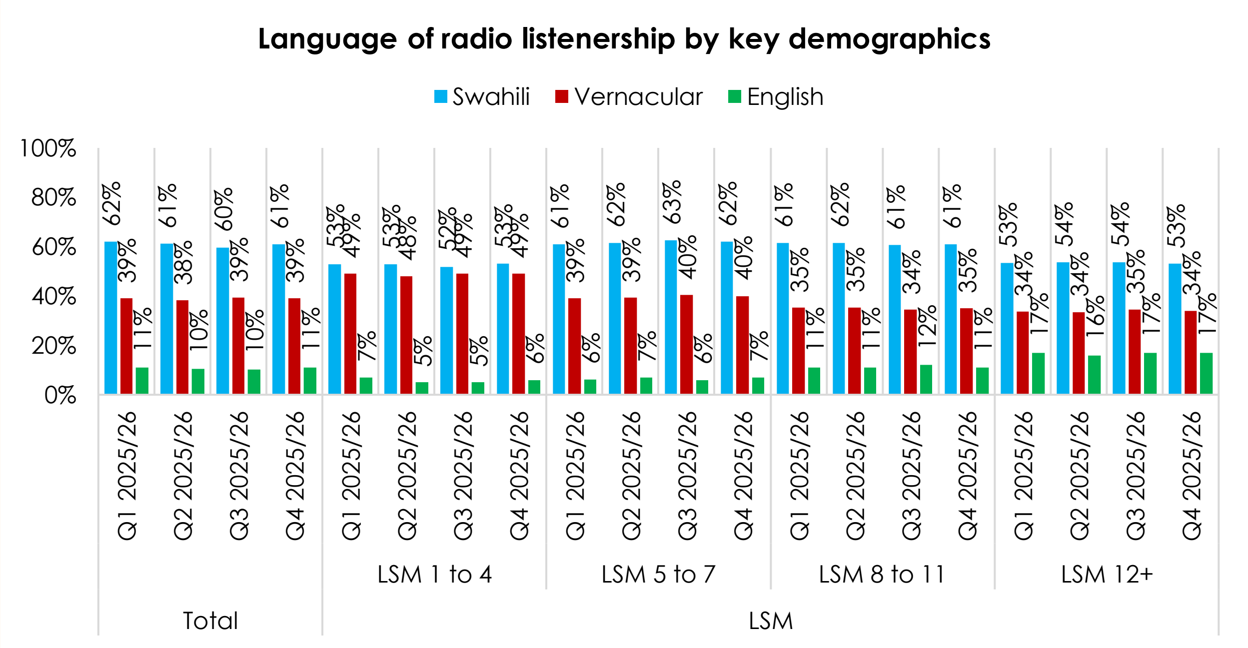



Figure 12: Radio listenership language by total & LSM

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*

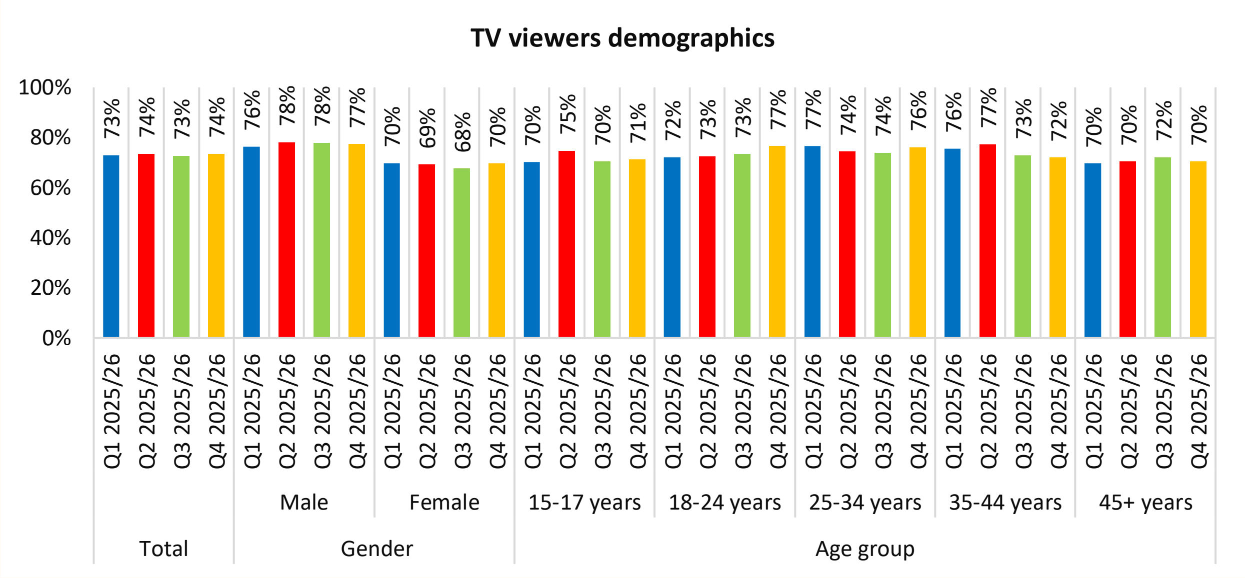
| Total/ Topography | | Quarter | Radio listenership language | | |
|---|---|---|---|---|---|
| | | | Swahili | Vernacular | English |
| Total | | Q1 2025/26 | 62% | 39% | 11% |
| | | Q2 2025/26 | 61% | 38% | 10% |
| | | Q3 2025/26 | 60% | 39% | 10% |
| | | Q4 2025/26 | 61% | 39% | 11% |
| Topography | Central | Q1 2025/26 | 45% | 53% | 10% |
| | | Q2 2025/26 | 44% | 52% | 10% |
| | | Q3 2025/26 | 44% | 53% | 9% |
| | | Q4 2025/26 | 44% | 53% | 10% |
| | Coast | Q1 2025/26 | 62% | 32% | 13% |
| | | Q2 2025/26 | 61% | 32% | 14% |
| | | Q3 2025/26 | 63% | 31% | 13% |
| | | Q4 2025/26 | 62% | 31% | 14% |
| | Lake | Q1 2025/26 | 45% | 58% | 5% |
| | | Q2 2025/26 | 47% | 58% | 5% |
| | | Q3 2025/26 | 47% | 59% | 4% |
| | | Q4 2025/26 | 47% | 58% | 4% |
| | Lower Eastern | Q1 2025/26 | 36% | 63% | 8% |
| | | Q2 2025/26 | 36% | 63% | 8% |
| | | Q3 2025/26 | 35% | 64% | 8% |
| | | Q4 2025/26 | 36% | 63% | 8% |
| | Nairobi | Q1 2025/26 | 67% | 16% | 24% |
| | | Q2 2025/26 | 67% | 16% | 24% |
| | | Q3 2025/26 | 68% | 17% | 24% |
| | | Q4 2025/26 | 67% | 16% | 24% |
| | North Eastern | Q1 2025/26 | 54% | 27% | 25% |
| | | Q2 2025/26 | 53% | 27% | 26% |
| | | Q3 2025/26 | 54% | 27% | 26% |
| | | Q4 2025/26 | 54% | 27% | 25% |
| | North Western | Q1 2025/26 | 68% | 33% | 10% |
| | | Q2 2025/26 | 67% | 32% | 11% |
| | | Q3 2025/26 | 67% | 31% | 10% |
| | | Q4 2025/26 | 68% | 32% | 11% |
| | Rift | Q1 2025/26 | 71% | 30% | 8% |
| | | Q2 2025/26 | 70% | 29% | 8% |
| | | Q3 2025/26 | 69% | 29% | 8% |
| | | Q4 2025/26 | 70% | 29% | 8% |
| | South Nyanza | Q1 2025/26 | 77% | 25% | 6% |
| | | Q2 2025/26 | 78% | 25% | 6% |
| | | Q3 2025/26 | 78% | 24% | 8% |

| | | | | | |
|---|---|---|---|---|---|
| | | Q4 2025/26 | 78% | 25% | 7% |
| | Upper Eastern | Q1 2025/26 | 49% | 51% | 8% |
| | | Q2 2025/26 | 48% | 49% | 9% |
| | | Q3 2025/26 | 47% | 49% | 9% |
| | | Q4 2025/26 | 48% | 49% | 9% |
| | Western | Q1 2025/26 | 87% | 17% | 4% |
| | | Q2 2025/26 | 88% | 15% | 4% |
| | | Q3 2025/26 | 88% | 16% | 4% |
| | | Q4 2025/26 | 87% | 16% | 4% |

## 4. TV Viewership Section

### 4.1. TV Viewer's Key Demographics

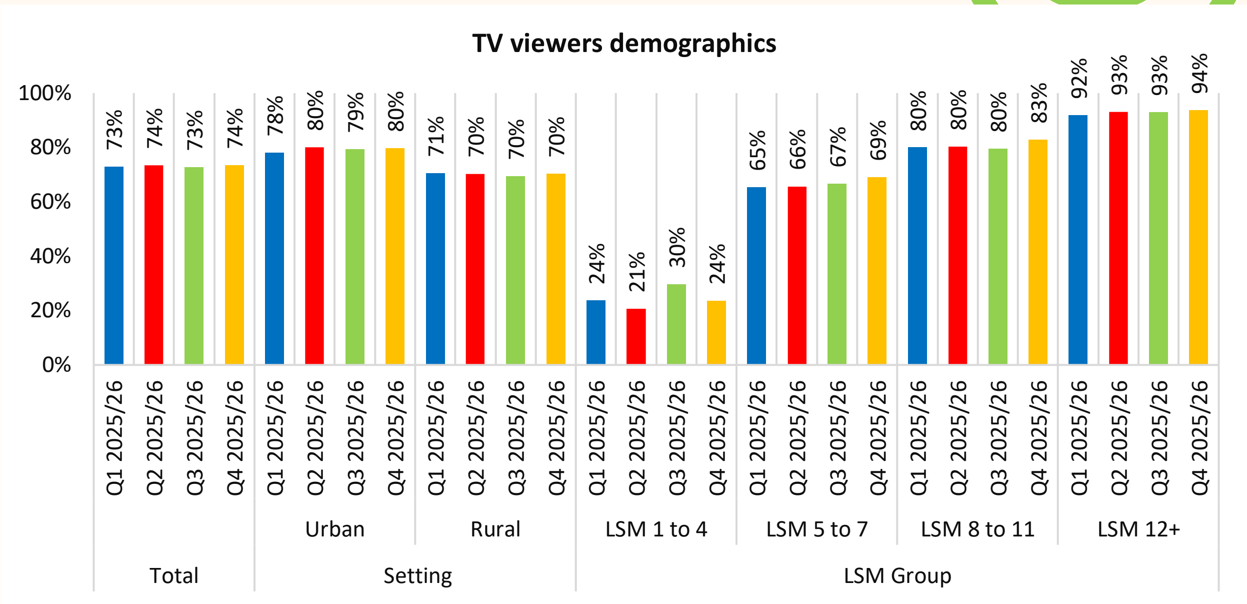
TV viewership is consistently higher among men than women across all four quarters. By age, the strongest engagement is seen among adults aged 25–34 years, while viewership declines noticeably among younger audiences aged 15–17 years.




N=32.23M: All Respondents

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

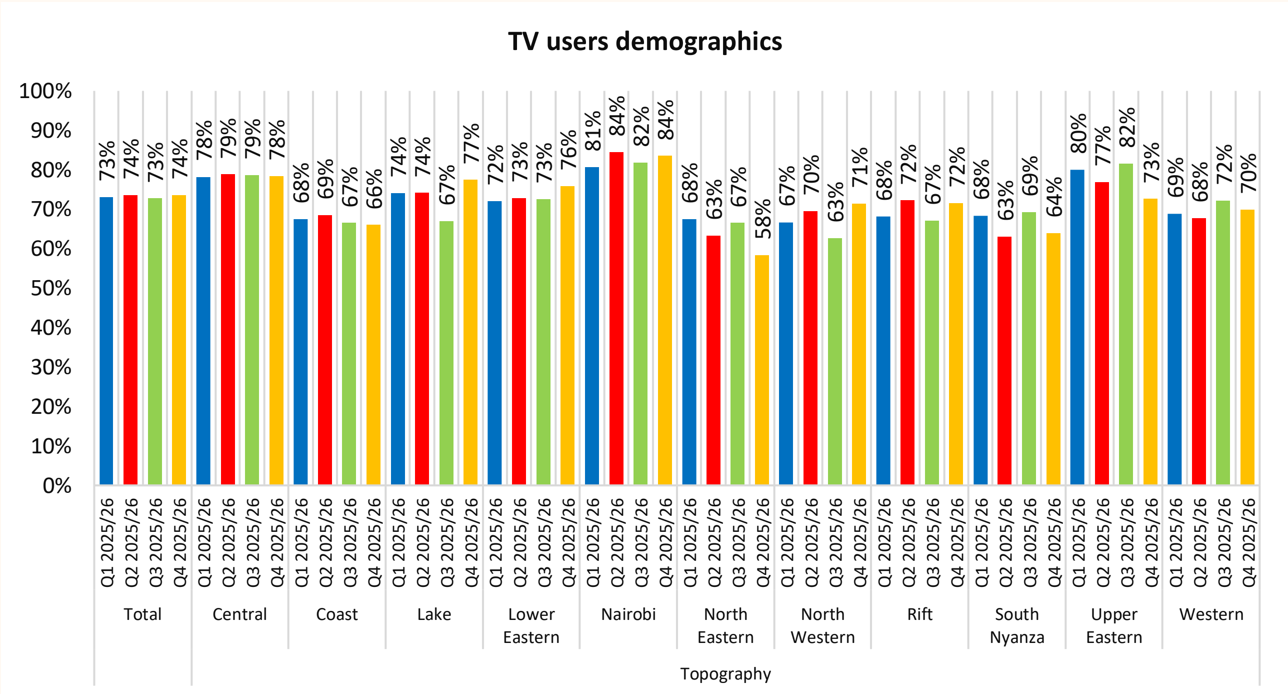
TV viewership is consistently higher in urban areas than in rural areas across all quarters. Differences are even more evident by socioeconomic status, with significantly lower viewership among LSM 1–4, likely due to limited access to television sets and electricity. In contrast, viewership is highest 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

TV viewership is strongest in Nairobi and Rift, which consistently record the highest levels of engagement across the periods, while regions such as Upper Eastern, Western, and South Nyanza also demonstrate relatively high and stable viewership; Central, while still above average, shows a slight softening in the most recent quarter, and regions like Lower Eastern and Lake maintain moderate but consistent performance. In contrast, North Eastern and North Western continue to register the lowest levels of TV viewership, highlighting persistent regional disparities in television access and 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.

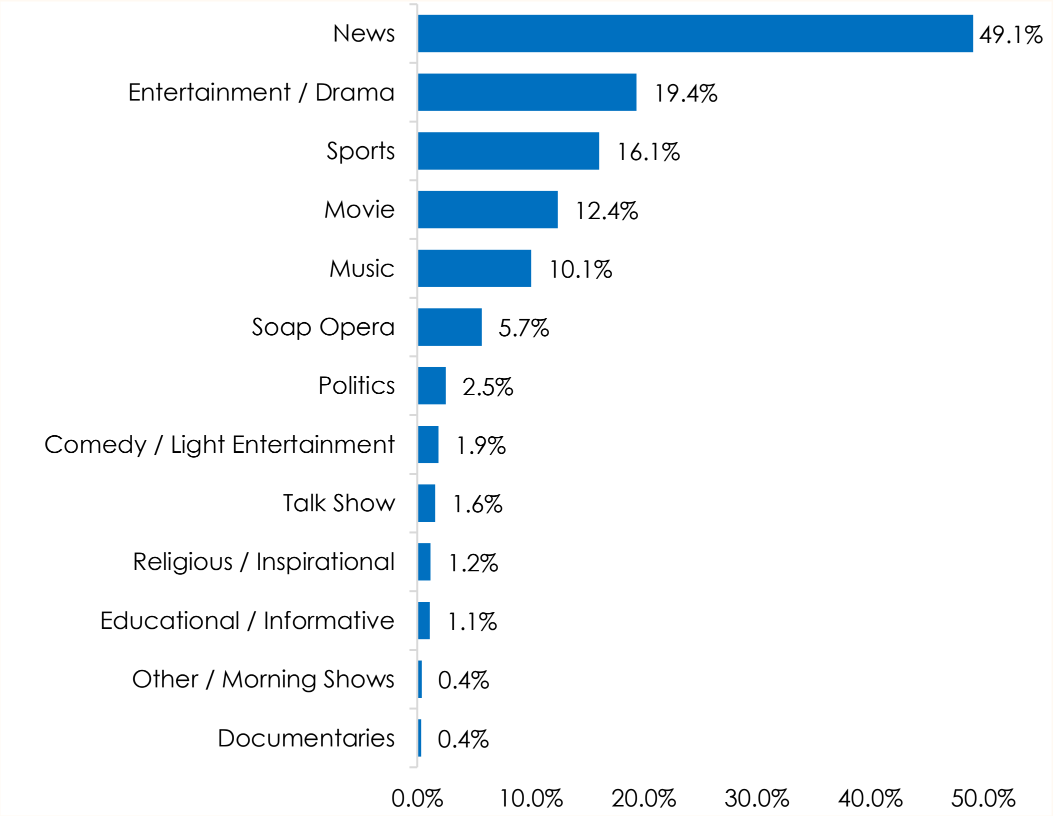
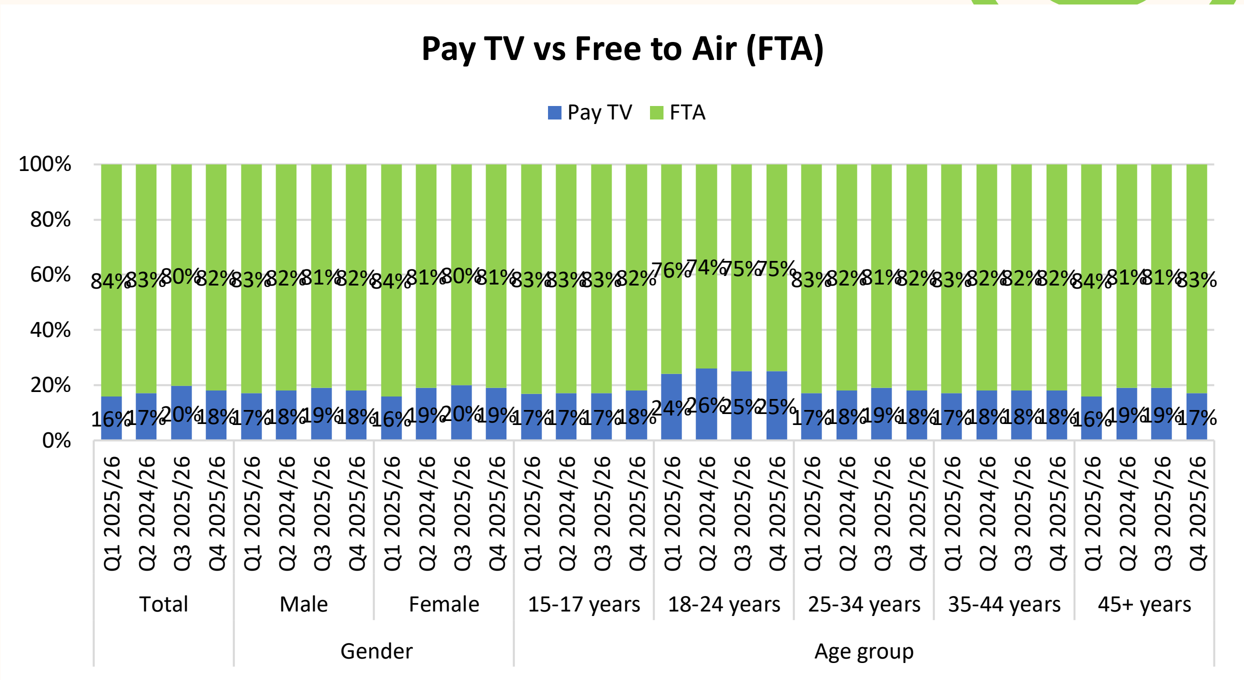



Figure 16: TV Genre Preference

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

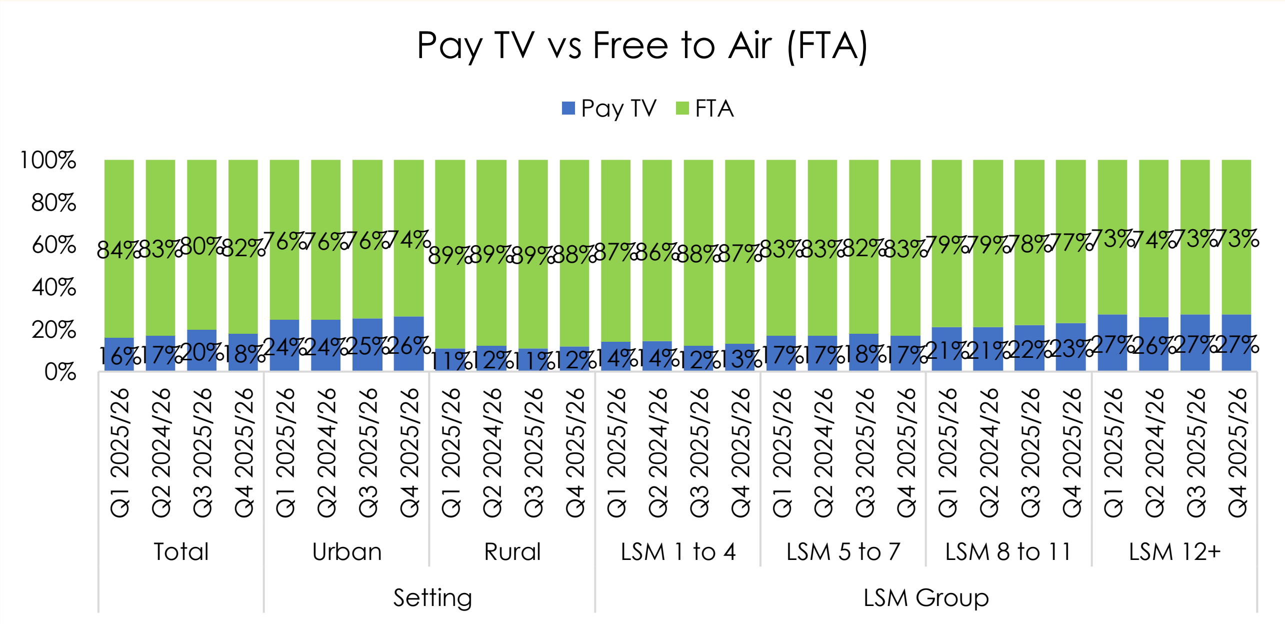
Free-to-air (FTA) television clearly dominates TV viewership in Kenya, attracting a much larger audience than Pay TV across the population. Viewing patterns show little difference between men and women, indicating broadly similar access and preferences by gender. However, Pay TV has relatively stronger 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.

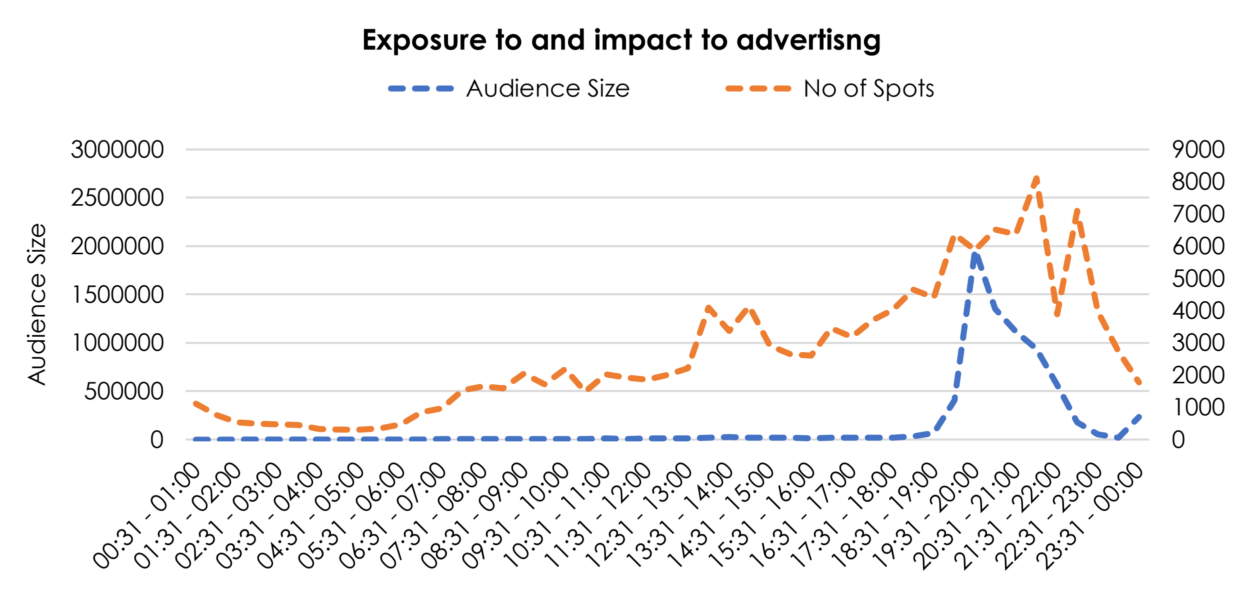
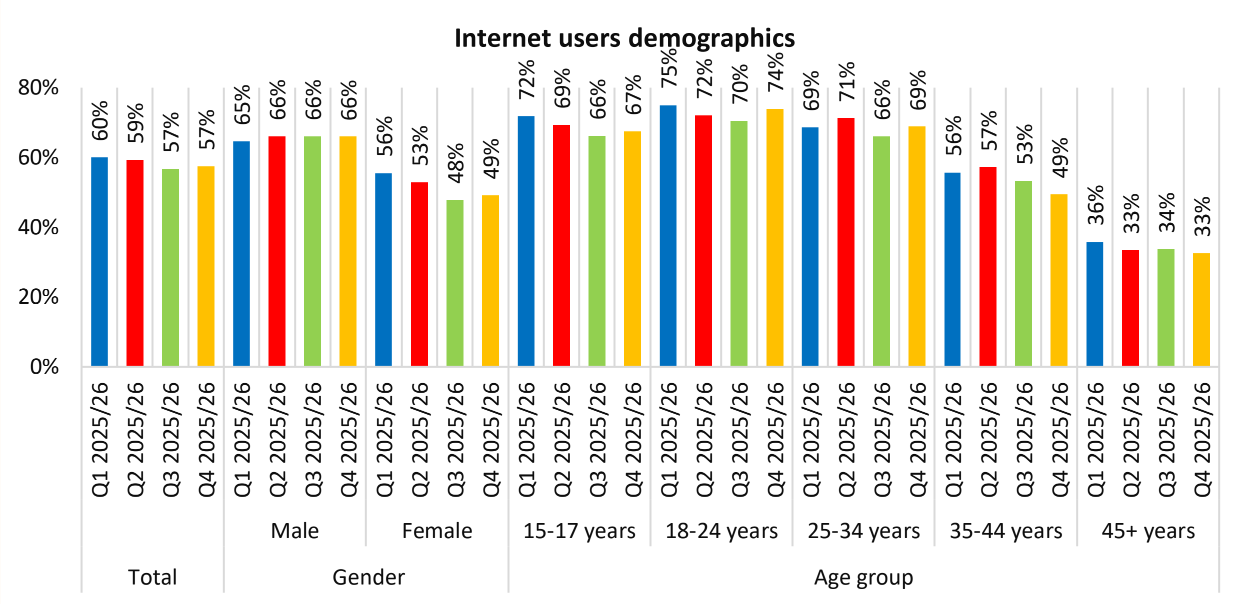



Figure 19: TV exposure to and impact to advertising

## 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=18.8M: 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.

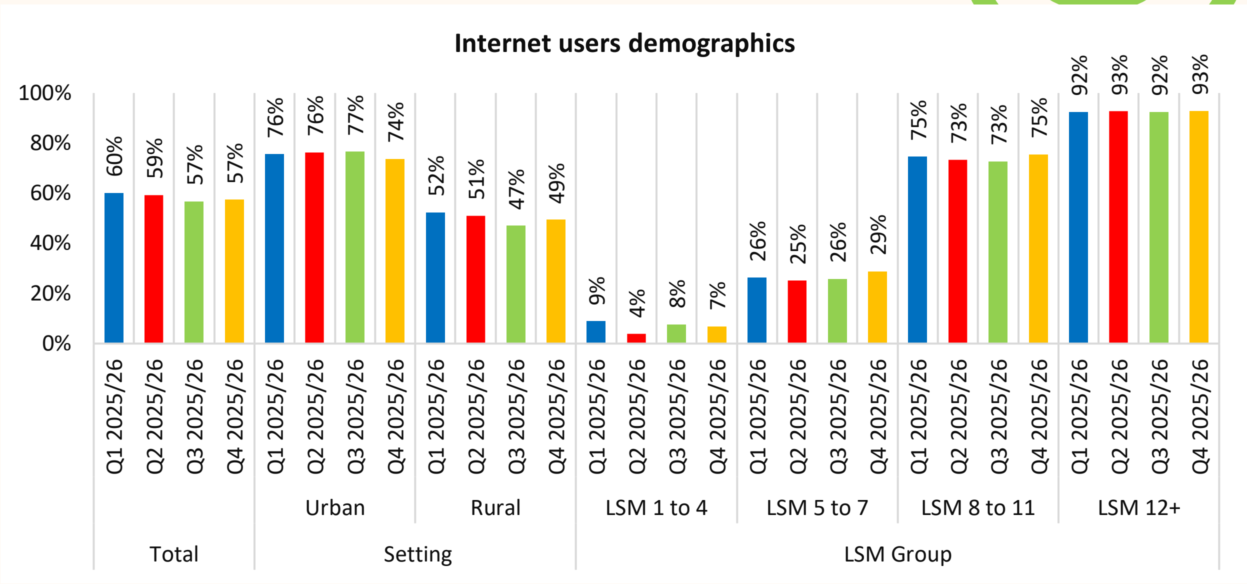



Figure 21: Internet users' demographics – total, setting and LSM

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.

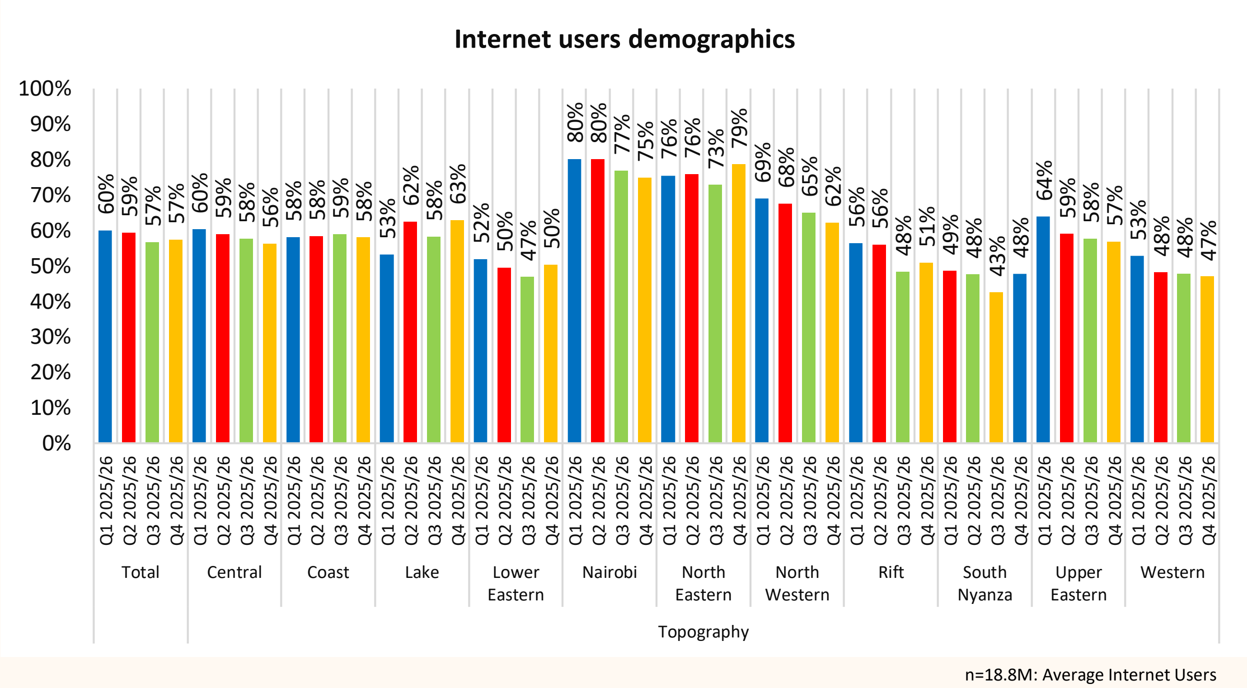



Figure 22: Internet users' demographics – total and topography

## 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.

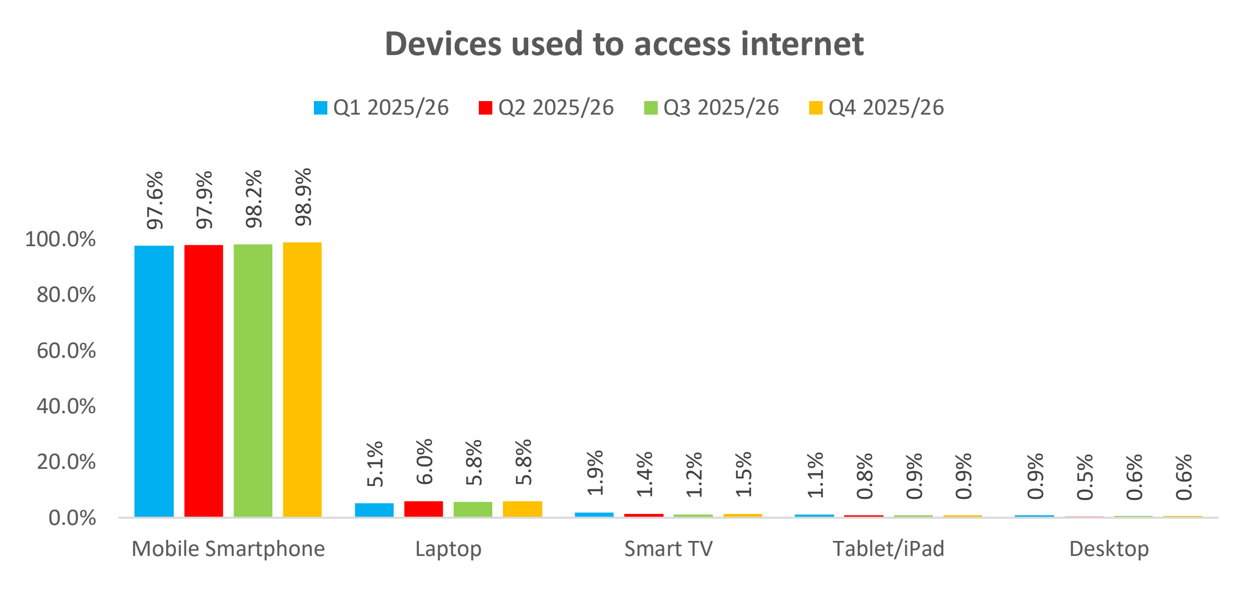



Figure 23:Devices used to access the internet

### 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.

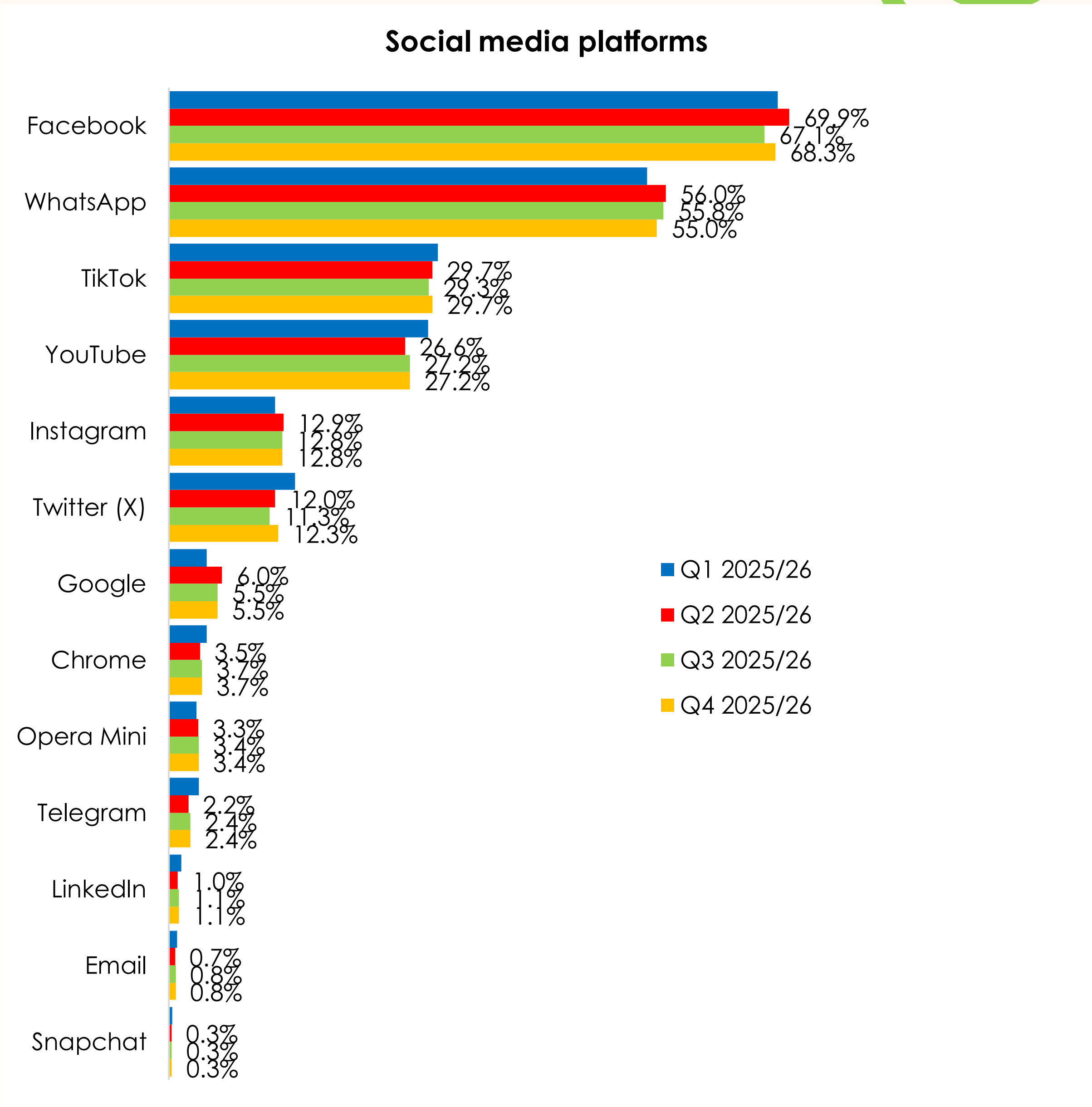
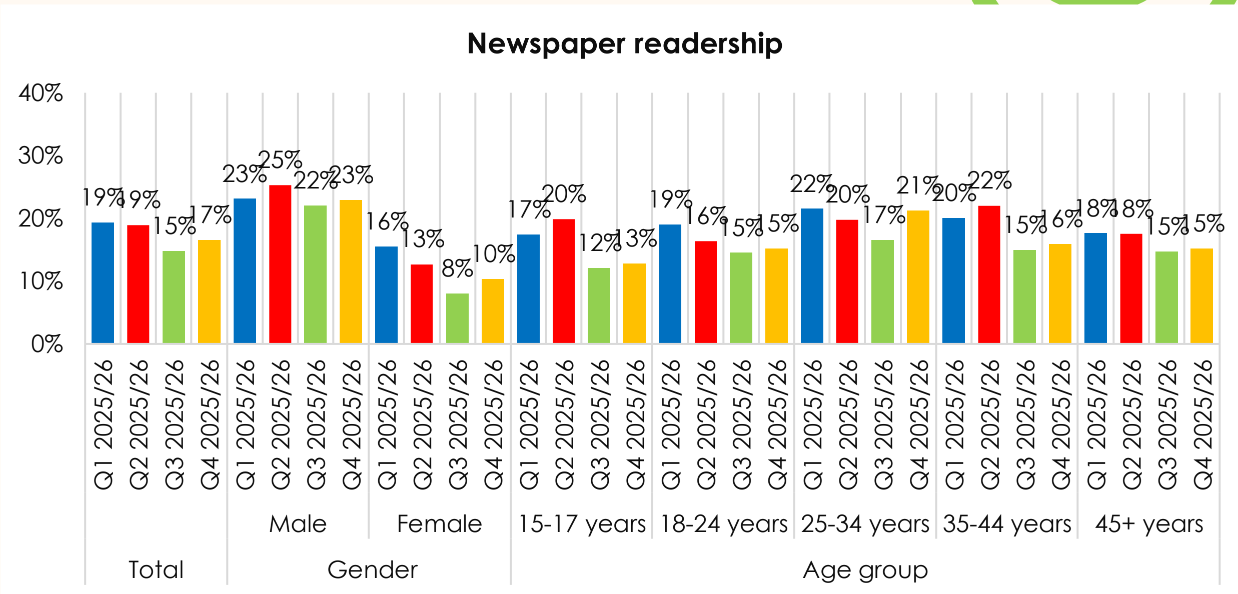



Figure 25: Popular social media platforms

## 6. Newspaper Readership

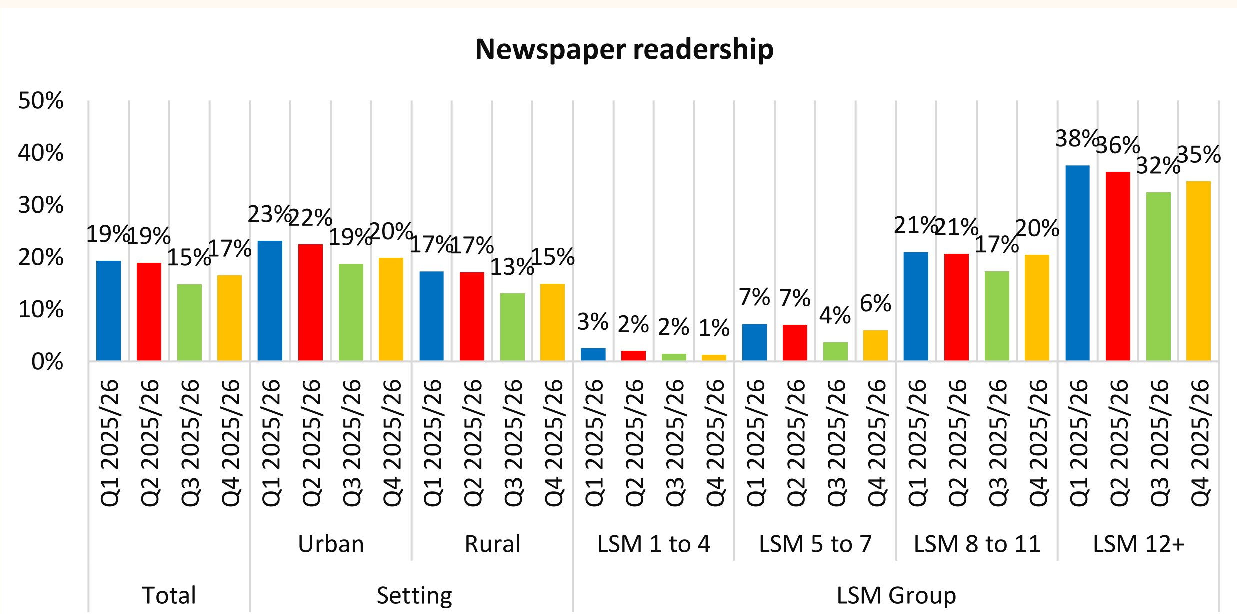
Newspaper reading in Kenya shows a noticeable difference between men and women, with men consistently reporting higher readership than women in all quarters. By age, people aged 25-34 years are the most active newspaper readers, recording the highest levels of readership. In contrast, newspaper reading 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 Q4 2025/26, newspaper readership was highest in the Lake region at 21%, followed by Rift at 20%, indicating relatively stronger engagement with print media in these areas. Most other regions recorded modest recovery or remained broadly stable, while North Eastern had the lowest readership at 8%, highlighting a generally soft but regionally varied newspaper consumption landscape.

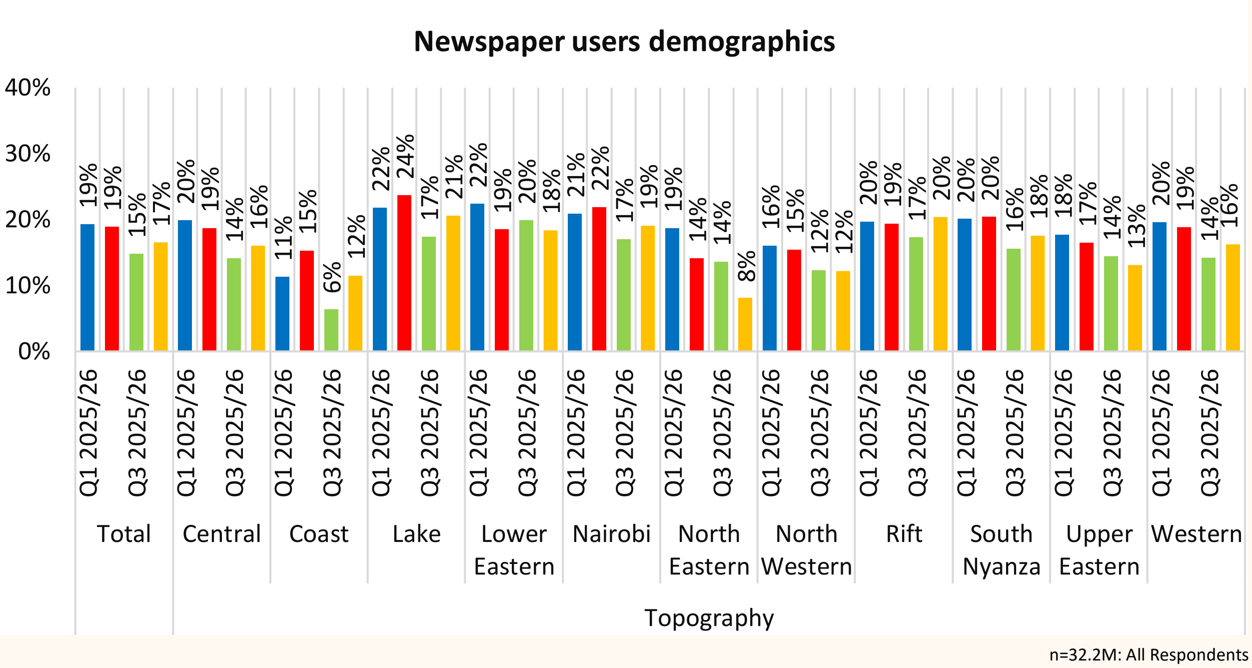



Figure 26: Newspaper readership demographics – by total and topography

## 7. Advertising Expenditure

### 7.1. Advertising Expenditure Overview

Advertising spend shows a modest recovery in Q4 2025/26, with several sectors increasing investment compared with the previous quarter, although performance remains mixed across categories. The pattern suggests selective reinvestment rather than broad-based growth, as advertisers continue to adjust budgets according to sector priorities and market conditions.

Banking & Finance remains the largest and most resilient advertising sector, recording a notable increase in the latest quarter after declines in the preceding periods. Entertainment & Leisure, Hygiene & Beauty Care, and Property & Building Accessories also posted moderate growth, indicating renewed promotional activity. Office Supplies recorded the strongest percentage increase, while Furniture & Decoration rose sharply from a very low base; therefore, these large percentage movements should be interpreted cautiously.

In contrast, Medicine & Health Care registered the steepest decline, while Alcoholic Drinks, Upkeep Products, and Servicing Companies also reduced spending. Energy and Clothing & Accessories recorded positive growth but remained well below their earlier investment levels. Overall, advertising activity is concentrated in Banking & Finance and Servicing Companies, while smaller sectors continue to experience significant quarter-to-quarter volatility.

Table 7: Advertising Expenditure

| SECTOR | Q1 2025/26 | Q2 2025/26 | Q3 2025/26 | Q4 2025/26 | CHANGE (Q4-Q3) |
|---|---|---|---|---|---|
| Banking & Finance | 2,798 | 2,709 | 2,342 | 2,658 | 13.5% |
| Media & Publishing & Advertising | 2,082 | 3,271 | 1,864 | 2,311 | 24.0% |
| Servicing Companies | 2,204 | 1,598 | 1,878 | 1,872 | -0.3% |
| Telecommunication | 2,083 | 2,243 | 1,295 | 1,231 | -4.9% |
| Entertainment & Leisure | 1,523 | 1,087 | 1,094 | 1,191 | 8.9% |
| Foods | 1,185 | 1,221 | 449 | 977 | 117.6% |
| Hygiene & Beauty Care | 1,143 | 896 | 681 | 738 | 8.2% |
| Agriculture & Gardening Equipment | 153 | 218 | 540 | 737 | 36.4% |
| Property & Building & Acc. | 1,203 | 875 | 619 | 648 | 4.7% |
| Non-Alcoholic Drinks | 561 | 439 | 245 | 397 | 62.1% |
| Medicine & Health Care | 407 | 350 | 362 | 280 | -22.7% |
| Audio/ Video & Photo Equipment | 18 | 49 | 176 | 223 | 26.8% |
| Upkeep Products | 210 | 240 | 223 | 221 | -1.0% |
| Distribution | 396 | 497 | 258 | 209 | -18.9% |
| Office Supplies | 255 | 93 | 28 | 152 | 445.6% |
| Industrial Sector | 156 | 239 | 74 | 113 | 53.0% |
| Alcoholic Drinks | 133 | 187 | 95 | 85 | -10.2% |
| Household Appliances | 103 | 34 | 45 | 73 | 62.8% |
| Energy | 216 | 265 | 63 | 72 | 14.2% |
| Sport | 415 | 181 | 96 | 47 | -50.9% |
| Clothing & Accessories | 56 | 138 | 30 | 39 | 29.8% |
| Automotive | 75 | 75 | 59 | 37 | -37.3% |
| Furniture & Decoration | 11 | 41 | 1 | 12 | 1216.6% |
| Transportation & Accessories | 948 | 671 | 201 | 5 | -97.6% |
| **TOTAL AD SPENDS KSHS** | **18,331** | **17,619** | **12,719** | **14,328** | **12.7%** |

*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 | 1,144 | 1,291 | 223 | 2,658 | 19% |
| Media & Publishing & Advertising | 1,588 | 354 | 369 | 2,311 | 16% |
| Servicing Companies | 699 | 623 | 550 | 1,872 | 13% |
| Telecommunication | 942 | 284 | 5 | 1,231 | 9% |
| Entertainment & Leisure | 682 | 444 | 65 | 1,191 | 8% |
| Foods | 639 | 332 | 6 | 977 | 7% |
| Hygiene & Beauty Care | 626 | 111 | - | 738 | 5% |
| Agriculture & Gardening Equipment | 241 | 494 | 2 | 737 | 5% |
| Property & Building & Acc. | 466 | 167 | 14 | 648 | 5% |
| Non-Alcoholic Drinks | 159 | 237 | 0 | 397 | 3% |
| Medicine & Health Care | 137 | 139 | 4 | 280 | 2% |
| Audio.Video & Photo Equipments | 147 | 64 | 12 | 223 | 2% |
| Upkeep Products | 164 | 52 | 5 | 221 | 2% |
| Distribution | 142 | 61 | 6 | 209 | 1% |
| Office Supplies | | 150 | 3 | 152 | 1% |
| Industrial Sector | 23 | 78 | 12 | 113 | 1% |
| Alcoholic Drinks | 19 | 63 | 4 | 85 | 1% |
| Household Appliances | 43 | 28 | 2 | 73 | 1% |
| Energy | 25 | 37 | 10 | 72 | 1% |
| Sport | 24 | 12 | 12 | 47 | 0% |
| Clothing & Accessories | 26 | 14 | - | 39 | 0% |
| Automotive | 4 | 28 | 5 | 37 | 0% |
| Furniture & Decoration | - | 9 | 3 | 12 | 0% |
| Transportation & Accessories | - | 1 | 3 | 5 | 0% |
| **Total Ad Spends Kshs** | **7,939** | **5,073** | **1,316** | **14,328** | **100%** |

*Key: Figures in KES Millions (000,000)*

### 7.2. Year to Date Advertising Trends

Media advertising expenditure from 2023 to June 2026 exhibits a clear seasonal pattern, with television consistently attracting the highest share of advertising spend, despite periodic fluctuations. Television and radio spending generally strengthen during the second half of each year particularly in the third and fourth quarters before declining at the beginning of the following year, reflecting seasonal budgeting cycles and campaign timing.

Radio follows a similar but less volatile trend, maintaining relatively stable investment as a key complementary medium. In contrast, print advertising remains consistently low throughout the period, with only minor month-to-month variations, underscoring its continued role as a niche support medium. The decline observed in the first half of 2026 aligns with this recurring seasonal pattern rather than indicating a fundamental shift in advertisers' media investment strategies.

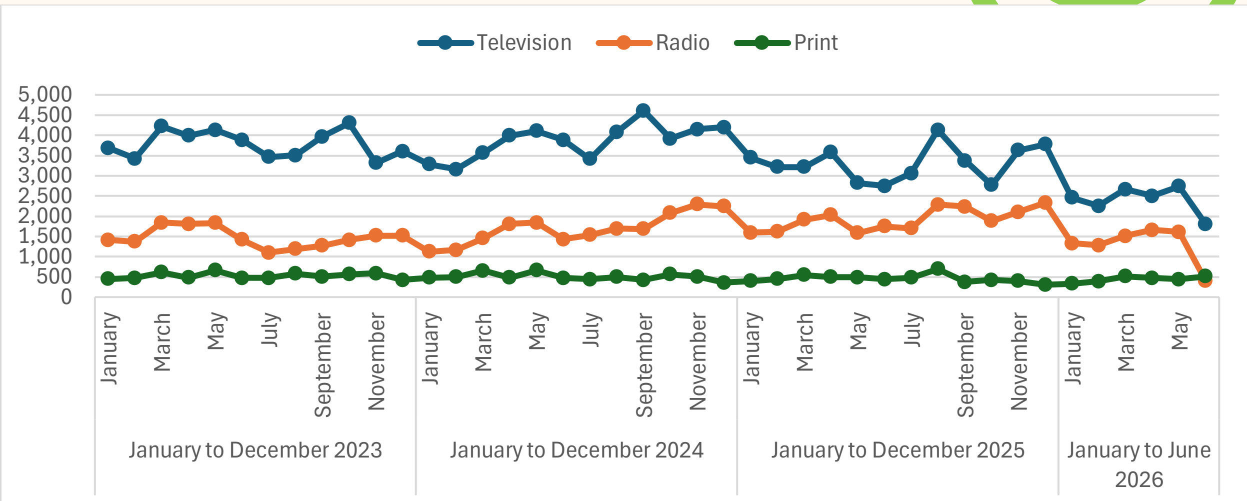



Figure 27: Advertising spends Jan 2023 to March 2026

*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 | |

| | | | |
|---|---|---|---|
| **Q4 2025/26** | April | 2,502 | 1.2 |
| | May | 2,741 | 2 |
| | June | 2,696 | 0.1 |

*Key: Figures in KES Millions (000,000)*

### 7.4. TV Spends by Sector/Industry

Telecommunications, Media & Publishing, and Banking & Finance remained the largest television advertising sectors throughout the year, although all recorded lower investment in the second half compared with the first half. Media & Publishing showed the greatest quarter-to-quarter volatility, peaking in Q2 before recovering in Q4, while Telecommunications experienced a steady decline after Q2.

Banking & Finance remained comparatively resilient, maintaining relatively stable investment levels despite moderate fluctuations. Several sectors, including Entertainment & Leisure, Hygiene & Beauty Care, Property & Building Accessories, and Distribution, exhibited sustained declines, reflecting more cautious advertising investment.

*Table 10: TV spends by sector/industry*

| Sector | Q1 2025/26 | Q2 2025/26 | Q3 2025/26 | Q4 2025/26 |
|---|---|---|---|---|
| Media & Publishing & Advertising | 1170 | 1945 | 1077 | 1588 |
| Telecommunication | 1531 | 1578 | 1008 | 942 |
| Banking & Finance | 1259 | 1215 | 1038 | 1144 |
| Entertainment & Leisure | 1017 | 743 | 705 | 682 |
| Hygiene & Beauty Care | 983 | 755 | 615 | 626 |
| Property & Building & Acc | 950 | 638 | 521 | 466 |
| Servicing Companies | 790 | 642 | 814 | 699 |
| Foods | 777 | 756 | 314 | 639 |
| Distribution | 336 | 270 | 161 | 142 |
| Medicine & Health Care | 222 | 260 | 272 | 137 |
| Transportation & Accessories | 436 | 287 | 74 | 0 |
| Upkeep Products | 156 | 196 | 180 | 164 |
| Non-Alcoholic Drinks | 150 | 303 | 90 | 159 |
| Agriculture & Gardening Equipment | 61 | 32 | 153 | 241 |
| Sport | 304 | 108 | 70 | 24 |
| Clothing & Accessories | 53 | 127 | 21 | 26 |
| Audio. Video & Photo Equipment's | 17 | 36 | 173 | 147 |
| Office Supplies | 131 | 58 | 4 | 0 |
| Energy | 40 | 109 | 16 | 25 |
| Alcoholic Drinks | 51 | 48 | 17 | 19 |
| Household Appliances | 48 | 0 | 22 | 43 |
| Industrial Sector | 62 | 50 | 3 | 23 |
| Automotive | 19 | 5 | 21 | 4 |
| Furniture & Decoration | 0 | 15 | 0 | 0 |
| **Grand Total** | **10,565** | **10,176** | **7,368** | **7,368** |

*Key: Figures in KES Millions (000,000)*

### 7.5. Sector spends distribution on radio

Banking & Finance remained the dominant radio advertising sector throughout the year, maintaining consistently high investment across all four quarters and reaffirming radio's importance for achieving broad reach and campaign frequency. Servicing Companies also strengthened their presence in the second half of the year, while Agriculture & Gardening Equipment recorded the strongest growth, increasing steadily each quarter to emerge as one of the fastest-growing advertising sectors on radio. Foods also recovered strongly in Q4 after a notable dip in Q3, signalling renewed advertising activity.

Conversely, several traditionally strong sectors, including Telecommunications, Media & Publishing, Entertainment & Leisure, Property & Building Accessories, and Transport & Accessories, experienced sustained declines in advertising expenditure, with Transport & Accessories recording no spend in the final quarter. Overall, the data points to a more selective and targeted radio advertising landscape, where investment is increasingly concentrated in resilient and growing sectors, while others continue to optimise budgets and reduce campaign intensity.

Table 11: Advertising spend by sector for radio

| Sector/ Industry | Q1 2025/26 | Q2 2025/26 | Q3 2025/26 | Q4 2025/26 |
|---|---|---|---|---|
| **Banking & Finance** | 1,399 | 1,368 | 1,097 | 1291 |
| **Servicing Companies** | 657 | 481 | 547 | 623 |
| **Agriculture & Gardening Equipment** | 92 | 186 | 386 | 494 |
| **Entertainment & Leisure** | 389 | 293 | 316 | 444 |
| **Media & Publishing & Advertising** | 492 | 1,008 | 441 | 354 |
| **Foods** | 407 | 464 | 134 | 332 |
| **Telecommunication** | 545 | 642 | 283 | 284 |
| **Non-Alcoholic Drinks** | 410 | 136 | 155 | 237 |
| **Property & Building & Acc.** | 233 | 198 | 88 | 167 |
| **Office Supplies** | 123 | 31 | 20 | 150 |
| **Medicine & Health Care** | 167 | 86 | 83 | 139 |
| **Hygiene & Beauty Care** | 159 | 141 | 66 | 111 |
| **Industrial Sector** | 71 | 176 | 61 | 78 |
| **Audio.Video & Photo Equipments** | 1 | 13 | 3 | 64 |
| **Alcoholic Drinks** | 77 | 131 | 76 | 63 |
| **Distribution** | 54 | 211 | 95 | 61 |
| **Upkeep Products** | 53 | 43 | 42 | 52 |
| **Energy** | 172 | 138 | 30 | 37 |
| **Automotive** | 50 | 69 | 35 | 28 |
| **Household Appliances** | 53 | 28 | 19 | 28 |
| **Clothing & Accessories** | 3 | 11 | 8 | 14 |
| **Sport** | 102 | 58 | 17 | 12 |
| **Furniture & Decoration** | 7 | 24 | 1 | 9 |
| **Transportation & Accessories** | 504 | 376 | 118 | 1 |

*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 | Q1 2025/26 | Q2 2025/26 | Q3 2025/26 | Q4 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 |
| **Property & Building & Acc.** | 7.4 | 4.1 | 17.5 | 17.6 |
| **Audio. Video & Photo Equipment's** | 0.0 | 22.8 | 13.3 | 10.3 |
| **Sport** | 21.3 | 19.3 | 38.1 | 10.1 |
| **Industrial Sector** | 4.6 | 7.9 | 7.8 | 9.9 |
| **Energy** | 0.0 | 8.0 | 16.1 | 8.9 |
| **Distribution** | 12.0 | 17.7 | 3.2 | 7.1 |
| **Foods** | 3.2 | 7.9 | 23.6 | 4.6 |
| **Telecommunication** | 2.7 | 1.2 | 4.3 | 4.6 |
| **Automotive** | 2.8 | 1.9 | 6.3 | 3.3 |
| **Upkeep Products** | 6.7 | 4.8 | 1.4 | 2.9 |
| **Medicine & Health Care** | 5.4 | 5.9 | 15.3 | 2.5 |
| **Alcoholic Drinks** | 1.2 | 5.1 | 7.5 | 1.9 |
| **Transportation & Accessories** | 0.2 | 0.0 | 0.6 | 1.7 |
| **Furniture & Decoration** | 5.5 | 0.3 | 0.0 | 1.2 |
| **Office Supplies** | 0.5 | 0.0 | 0.1 | 0.9 |
| **Agriculture & Gardening Equipment** | 7.3 | 1.0 | 0.6 | 0.5 |
| **Household Appliances** | 0.7 | 0.0 | 0.5 | 0.0 |
| **Non-Alcoholic Drinks** | 3.9 | 3.3 | 2.2 | 0.0 |
| **Clothing & Accessories** | 0.0 | 0.3 | 0.6 | 0.0 |
| **Hygiene & Beauty Care** | 0.3 | 0.5 | 0.7 | 0.0 |

*Key: Figures in KES Millions (000,000)*

### 7.7. Overall Digital Spends Trends

Industry digital ad spends reached KES 9.12B in Q4 24/26 a +22% jump vs. Q3 25/26, led by heavy investment from Retail & E-Commerce, FMCG, and Financial Services.

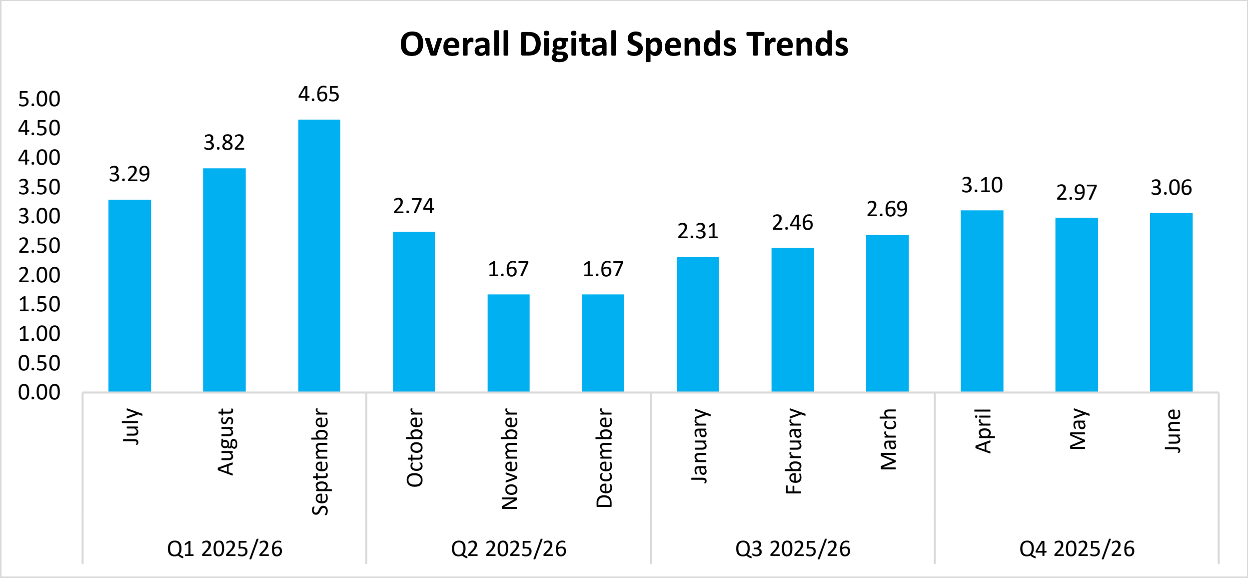



Figure 28: Overall Digital Spends Trends
Key: Figures in KES Billions (000,000,000)

### 7.8. Top Digital Channels

Meta platforms continued to dominate digital advertising expenditure throughout the year, with Facebook consistently attracting the largest share of spend despite fluctuations across quarters. After declining in Q2, Facebook's share rebounded strongly in Q4, reinforcing its position as the primary digital advertising platform. Instagram remained the second-largest platform, although its share gradually declined over the year, suggesting some redistribution of budgets to other channels.

Advertising investment outside the Meta ecosystem remained comparatively modest but showed notable quarter-to-quarter shifts. YouTube experienced a significant increase in Q3 before returning to lower levels in Q4, while TikTok emerged more prominently in the second half of the year, indicating growing advertiser interest in short-form video content. Meanwhile, spending on Twitter (X) fluctuated at relatively low levels throughout the period. Overall, the data highlights Meta's continued dominance while pointing to gradual diversification of digital advertising budgets across emerging video and social media platforms.

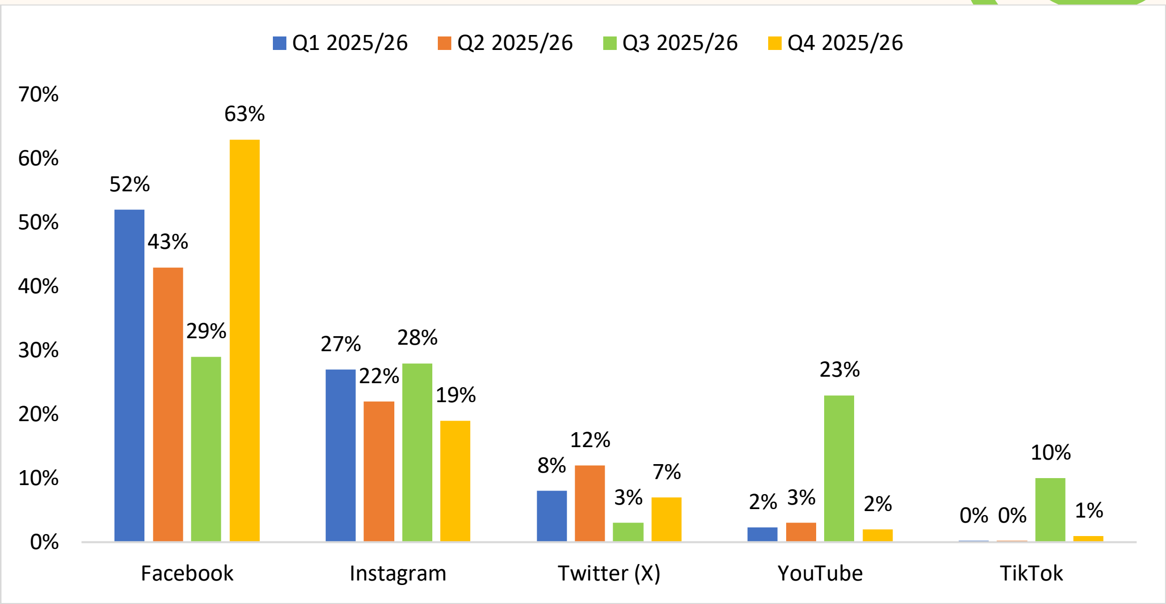



*Figure 29: Top Digital Channels*

## 8. CHALLENGES AND OPPORTUNITIES FOR THE BROADCASTING INDUSTRY IN KENYA

### Challenges in the Broadcasting Industry in Kenya

- **Audience fragmentation and changing consumption habits**

Audiences are increasingly spread across television, radio, social media, streaming platforms and websites. Younger and higher-income audiences are particularly inclined towards online and mobile-based content, while older, rural and lower-income audiences remain more dependent on traditional broadcasting. Broadcasters must therefore serve different audiences across multiple platforms without weakening their core radio and television products.

- **Competition for advertising revenue**

Although television and radio continue to attract significant advertising expenditure, digital platforms are taking a growing share of advertising budgets because they provide targeted reach, measurable engagement and flexible campaign formats. This intensifies competition for broadcasters and may reduce their ability to depend primarily on traditional advertising revenue.

- **High cost of digital transformation**

Transitioning from conventional broadcasting to integrated multimedia operations requires investment in digital production equipment, streaming infrastructure, mobile applications, data analytics, content management systems and specialised staff. Smaller and regional broadcasters may find it difficult to finance these investments while maintaining their existing transmission operations.

- **Unequal digital access**

Internet use remains stronger among urban, younger and higher-LSM audiences, while rural and lower-LSM audiences continue to rely heavily on radio and television. This digital divide limits broadcasters' ability to adopt fully online distribution models and requires them to maintain both traditional and digital channels.

- **Content saturation and intense competition**

The increased number of television and radio stations has expanded audience choice but also intensified competition. A small number of leading broadcasters continue to command substantial national reach and audience share, while many smaller stations compete for limited audiences and advertising revenue. Regional stations must also compete with national broadcasters and global digital platforms.

- **Pressure on credible journalism**

The growth of social media has increased the speed at which information circulates, but it has also increased the risk of misinformation and unverified content. Broadcasters are required to provide timely information while maintaining accuracy, editorial independence and public trust.

## Opportunities in the Broadcasting Industry in Kenya

- **Multi-platform content distribution**

Broadcasters can extend their reach by repurposing television and radio programmes for websites, mobile applications, podcasts, livestreams, YouTube and social media. A programme initially produced for radio or television can generate additional audiences through short videos, clips, podcasts and on-demand content.

- **Strong continuing reach of radio and television**

Radio and television remain among the most widely accessed media platforms in Kenya. This provides broadcasters with a strong foundation for mass communication, public information campaigns and national advertising. Radio remains particularly valuable for rural, vernacular and lower-income audiences, while television continues to provide strong visual reach and influence.

- **Growth of mobile-first consumption**

The dominance of mobile phones in accessing online and social media content provides an opportunity for broadcasters to develop mobile-friendly content. Short videos, live updates, podcasts, interactive programmes and downloadable content can help broadcasters attract younger and digitally connected audiences.

- **Expansion of vernacular and regional broadcasting**

Strong regional differences in radio and television preferences demonstrate continuing demand for locally relevant and language-specific content. Vernacular and regional broadcasters can strengthen their competitive position by focusing on local news, culture, music, agriculture, business, governance and community issues.

- **Development of new revenue streams**

Broadcasters can diversify beyond traditional advertising through sponsored content, digital subscriptions, branded programmes, events, content syndication, podcast sponsorships, influencer partnerships, e-commerce and paid streaming services. Diversification would reduce dependence on conventional spot advertising.