# Kenya Media Landscape Report

## July-September 2023

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## 1. INTRODUCTION

Kenya boasts of a media landscape renowned for its diversity and sophistication. The radio sector is thriving, with an impressive array of over 100 radio stations, many catering to various local languages. The transition to digital terrestrial television transmission in 2015 significantly expanded the television station count. Additionally, Kenya's remarkable proliferation of mobile phones has contributed to one of the highest internet penetration rates in Africa.

In such a vibrant and rapidly evolving media landscape as Kenya's, the need for research becomes increasingly evident. Research is a vital tool for media organisations, policymakers, and stakeholders to navigate the intricate dynamics of this sector. It enables us to understand better audience preferences, emerging trends, and the impact of various media platforms. Moreover, research provides critical insights into the ever-changing technological landscape, helping media entities adapt to new communication channels and digital advancements. In a competitive market, where staying relevant is paramount, investing in research is not just advantageous but a strategic imperative to ensure the sustainability and growth of the media industry in Kenya.

It is against that background that the Communications Authority of Kenya has compiled a Kenya Media Landscape Report that examines the media landscape in Kenya. The report covers the supply and demand of TV, radio and online media. In recognition that advertising drives the commercial nature of media, the report provides an overview of advertising expenditure.

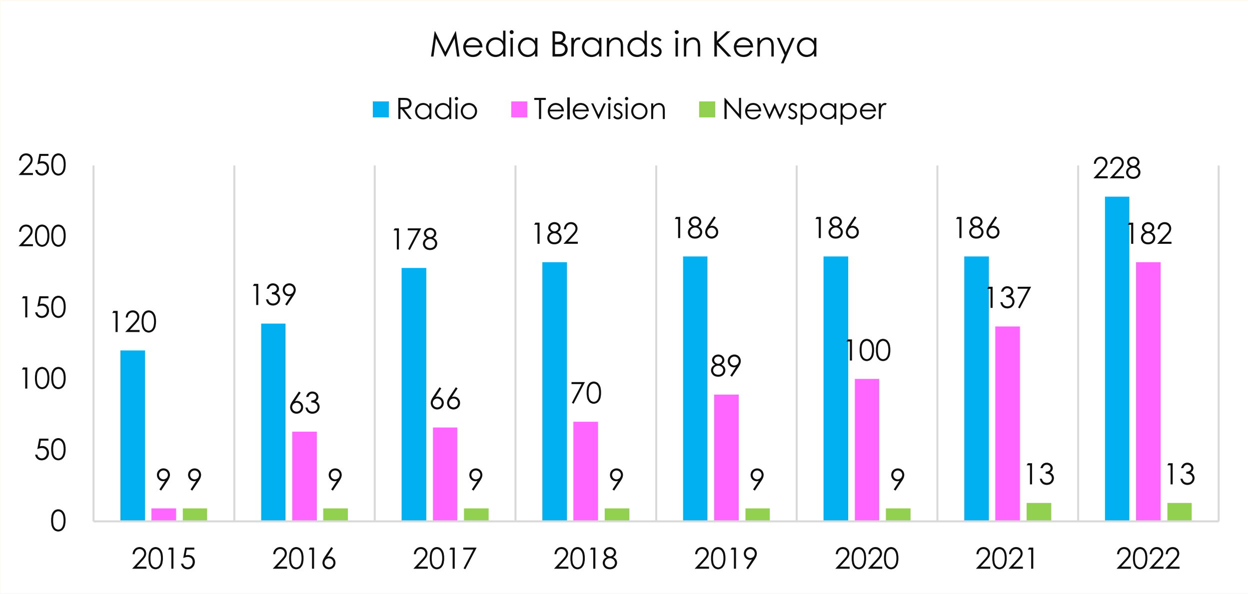
Audience measurement data is crucial in analyzing market trends and developing interventions aimed at enhancing the growth and competitiveness of the broadcasting sub-sector. The current broadcasting competition study relied on data from the Authority's past audience measurement reports to analyze FTA vs. PayTv viewership, and market shares of TV and radio stations, among others, to get a picture of the state of competition in the broadcasting sector in Kenya.

Further insights brought out in the report, such as consumer media consumption behavior by various metrics (male vs. female, urban vs. rural, topography), can be further analyzed to inform the Authority’s future market and even USF regulatory interventions, to ensure that the Authority’s actions are targeted and relevant, to have the maximum social benefit.

2. **MEDIA AVAILABILITY, ACCESS & AUDIENCES**

**2.1. Media Availability**

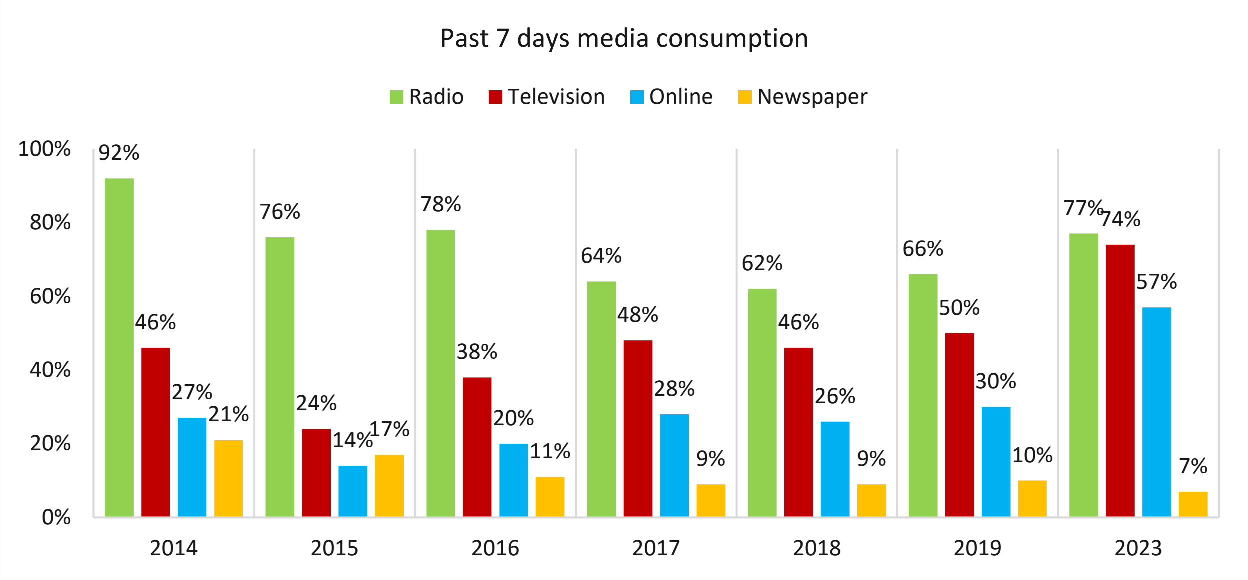
Between 2015 and 2022, there has been substantial growth in both radio and TV stations. The count for radio stations surged from 120 to 228, and for TV stations, there was a remarkable increase from 6 to 182. This surge in TV stations can be attributed to the proliferation of digital media, with an increasing availability of stations across various platforms, including set-top-boxes and online streaming. This shift in consumption patterns has played a pivotal role in shaping the current media landscape.




*Source: Communications Authority (radio and TV data)*

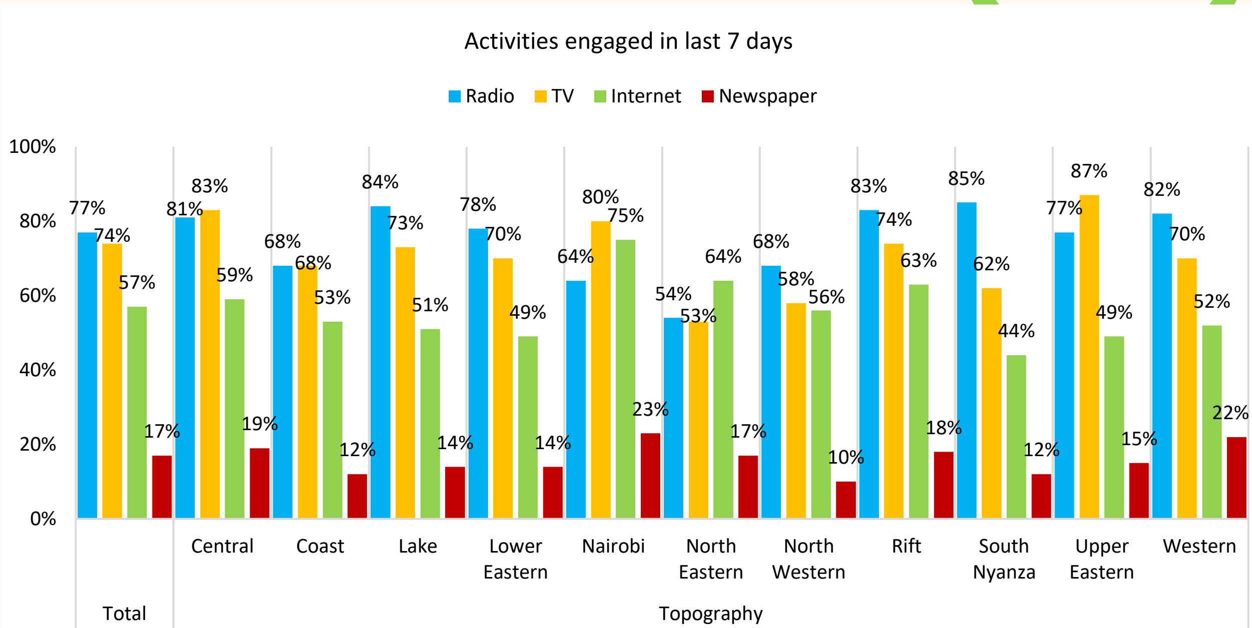
### 2.2. Media Consumption Habits

In 2014, radio dominated the media landscape in Kenya, with more than 90% of the population tuning in. However, there has been a notable decline, with radio listenership now standing at 77%. In contrast, TV viewership and online access have experienced a significant surge, more than doubling between 2014 and 2023. This shift in preferences suggests a dynamic transformation in the way Kenyans engage with media, with television and online platforms playing an increasingly prominent role in shaping the country's media consumption habits.



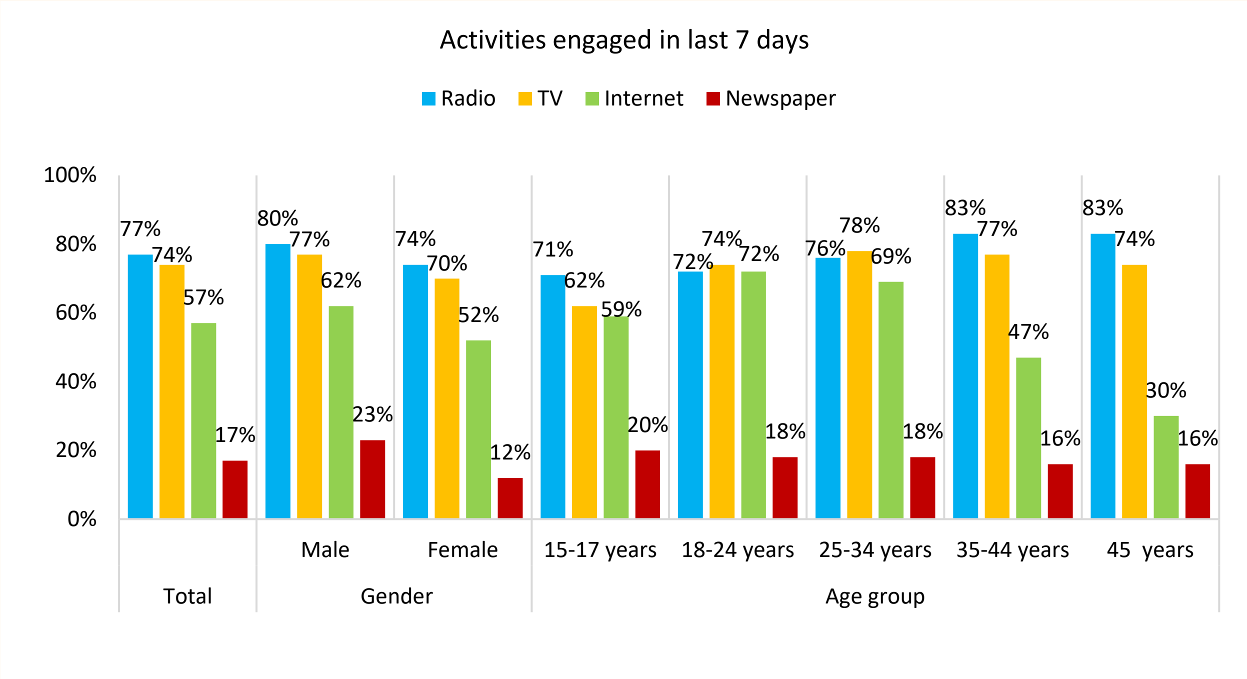

*Source: 2014 to 2091 KARF | 2023 CA National Surveys - July - October 2023 Survey*

Radio and television viewership surpasses other communication mediums in all regions except the North Eastern region, where internet usage takes the lead. Meanwhile, newspaper readership reaches its peak in the Nairobi and Western regions.




*Source: CA National Surveys - July - October 2023 Survey*

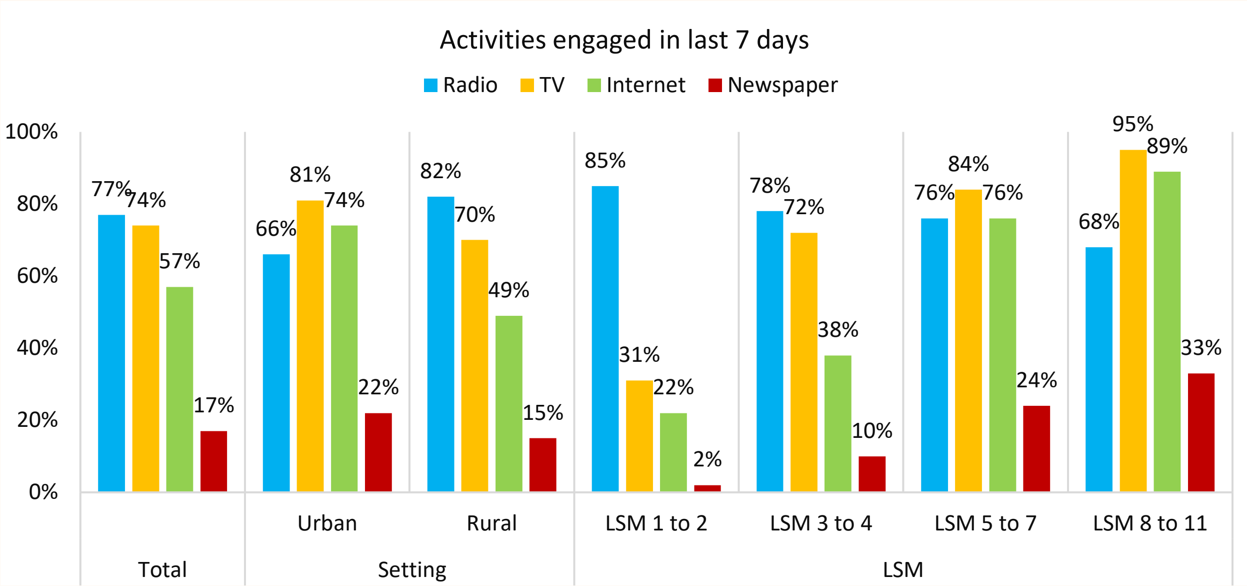
In terms of gender there was high media consumption among male respondents while age wise, the older respondents had a high percentage of those who listened to radio and those who watched TV.




*Source: CA National Surveys - July - October 2023 Survey*

Respondents from urban setting had a high percentage of those who watched TV while Rural setting had a high percentage of those who listened to radio. LSM

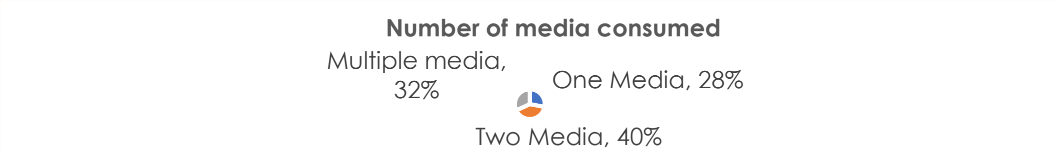
8 to 11 had the majority of the respondents who had watched TV and those who had browsed the internet. Newspaper readership was high among respondents in LSM 8 to 11.




*Source: CA National Surveys - July - October 2023 Survey*

### 2.3. Number of Media Consumed

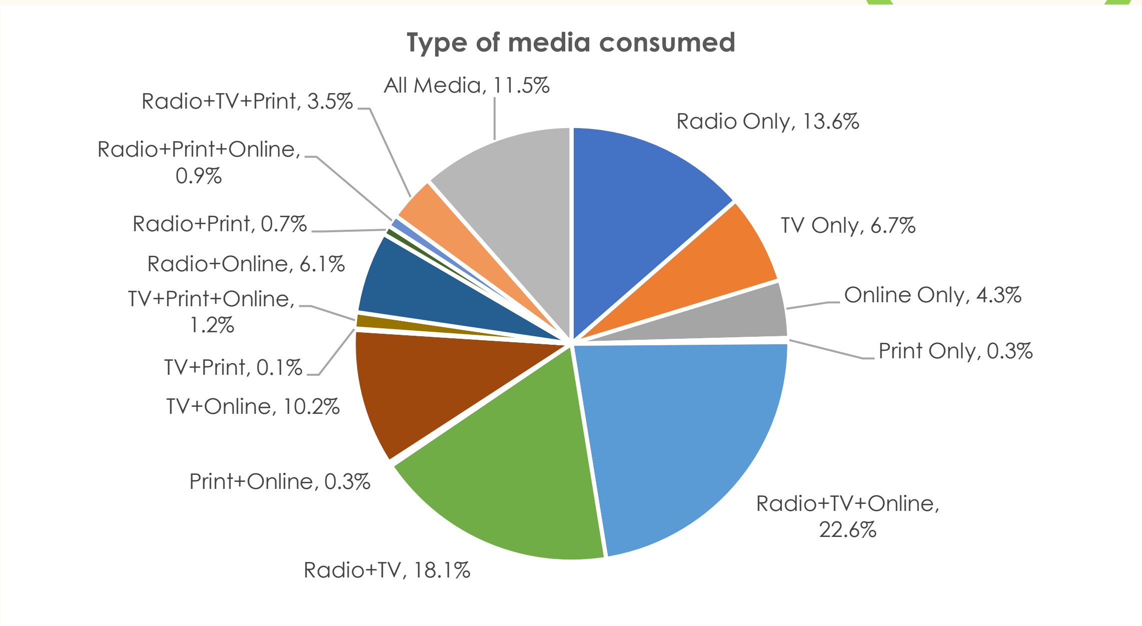
More than one type of media is consumed daily by the majority of media consumers. Only a third of respondents consume only one type of media.




*Source: CA National Surveys - July - October 2023 Survey*

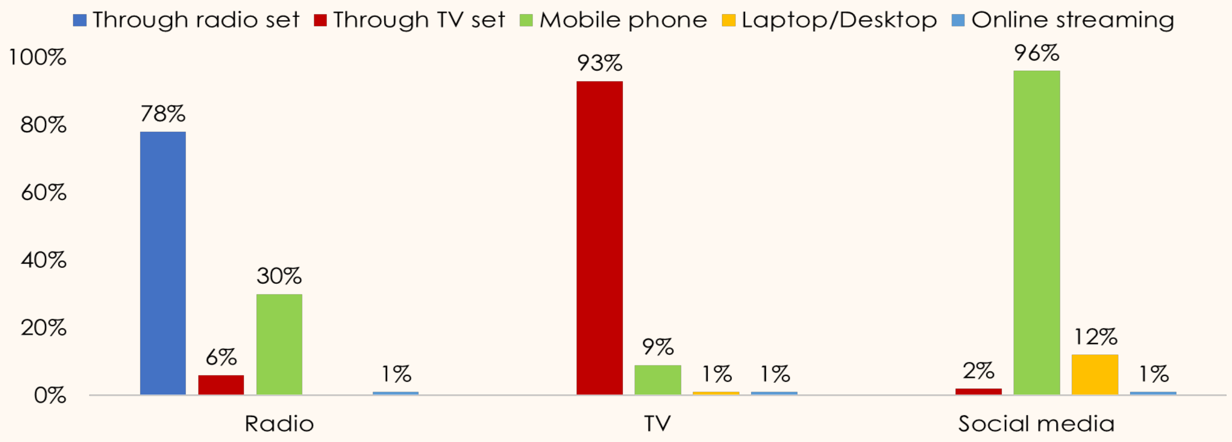
### 2.4. Type of Media Consumed

One out of 10 (11.5%) respondents have consumed all media in the past 7 days. A combination of radio, TV, and internet was consumed by 22.6% of the respondents in the past 7 days




## 2.5. Ways in which Media is consumed

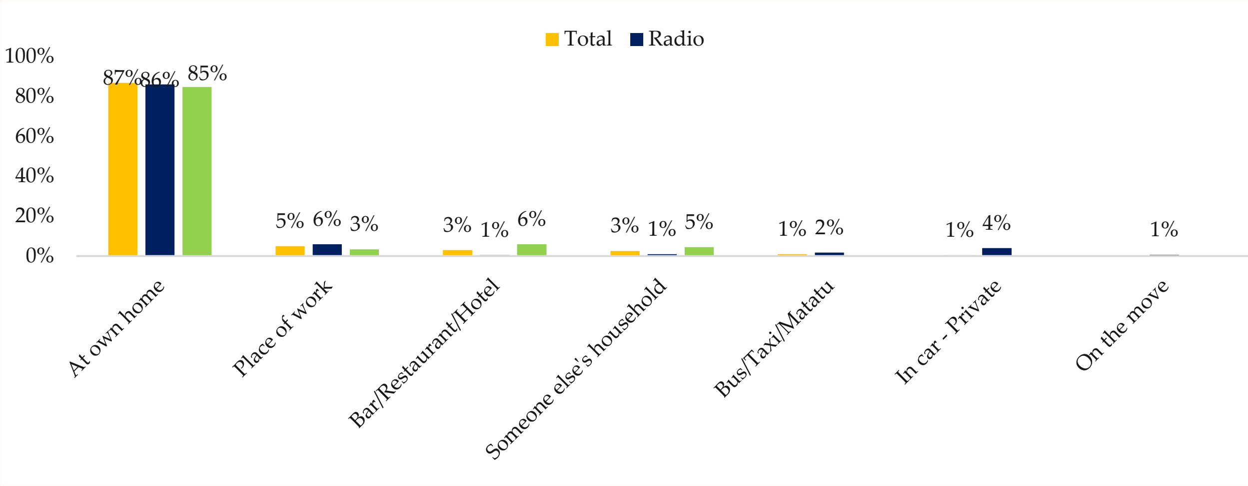
The primary medium for radio, consumption is traditional radio sets, with mobile phones also serving as a significant platform, accounting for approximately one-third of radio listenership. TV viewership predominantly occurs through television sets, and the internet plays an increasingly important role. Similarly, social media is predominantly accessed and consumed through mobile phones, underscoring the growing influence of handheld devices in shaping our media consumption habits. This mobile-centric trend reflects the evolving media consumption landscape in the digital age.




*Source: CA National Surveys - July - October 2023 Survey*

### 2.6. Place of Media Consumption

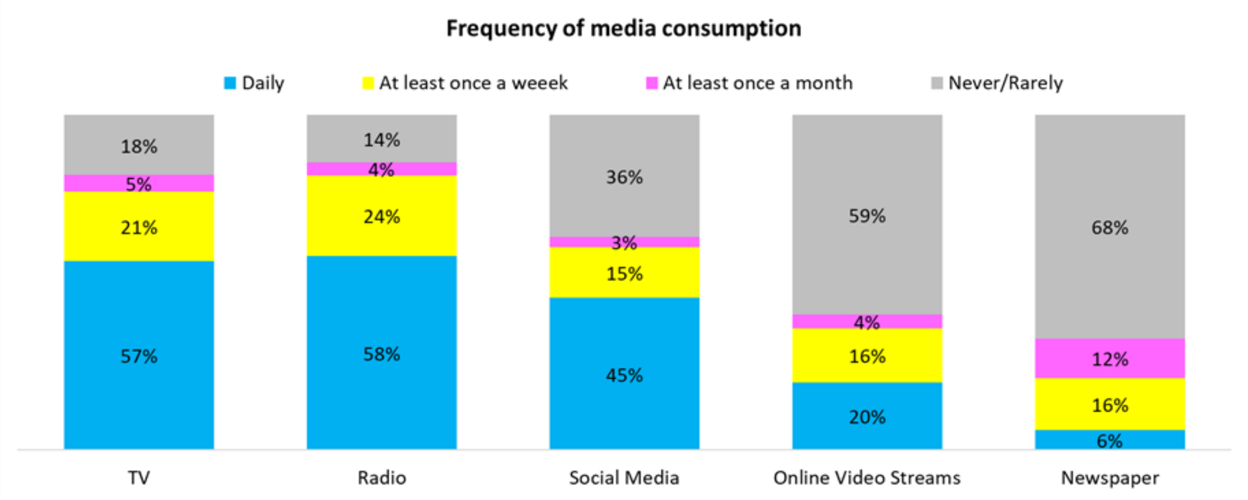
Notably, the home remains the primary hub for media consumption, with 87% of individuals engaging in this activity there. While radio holds a slight edge over television in this setting, the workplace also witnesses media consumption, with radio being more favored, suggesting that some individuals tune in to radio during work hours. Social settings like bars, restaurants, and hotels exhibit a preference for TV content.




*Source: CA National Surveys - July - October 2023 Survey*

### 2.7. Frequency of Media Consumption

Roughly 50% of the participants reported daily engagement with both radio and television. Social media usage was a daily habit for nearly half of the respondents. In contrast, more than two-thirds of the surveyed individuals admitted to not reading newspapers.

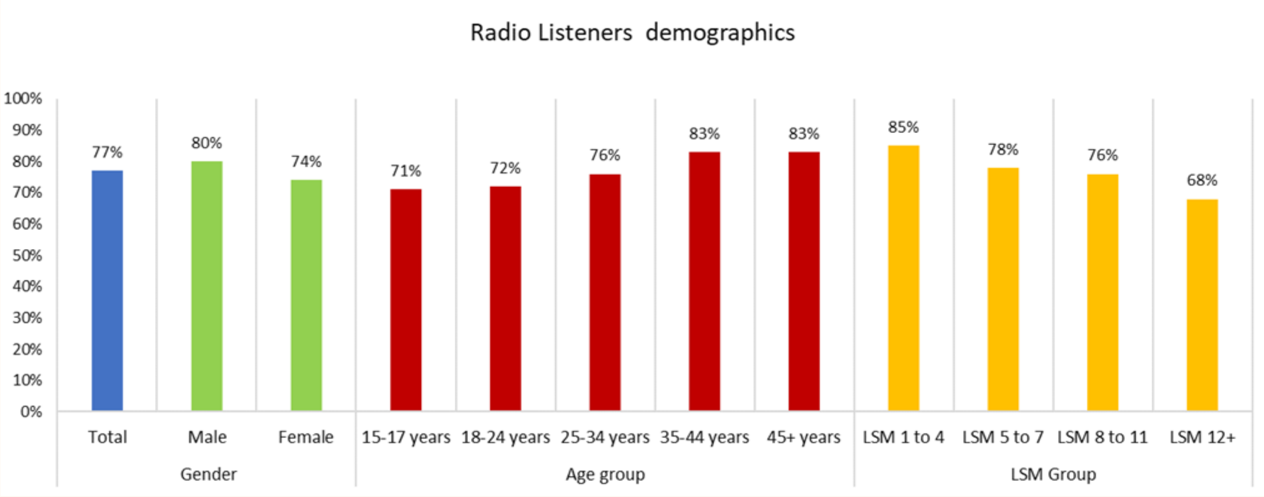



*Source: CA National Surveys - July - October 2023 Survey*

## 3. Radio Listenership Section

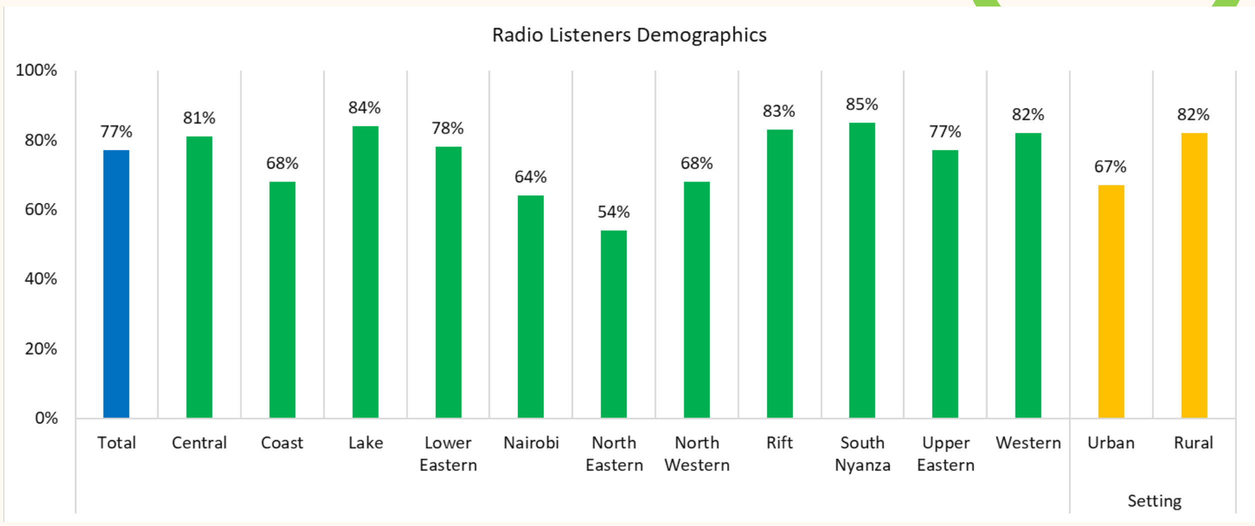
### 3.1. Radio Listeners Demographics

Radio consumption is higher among males than females. It is also higher amongst the older respondents and those in lower LSMs.




*Source: CA National Surveys - July - October 2023 Survey*

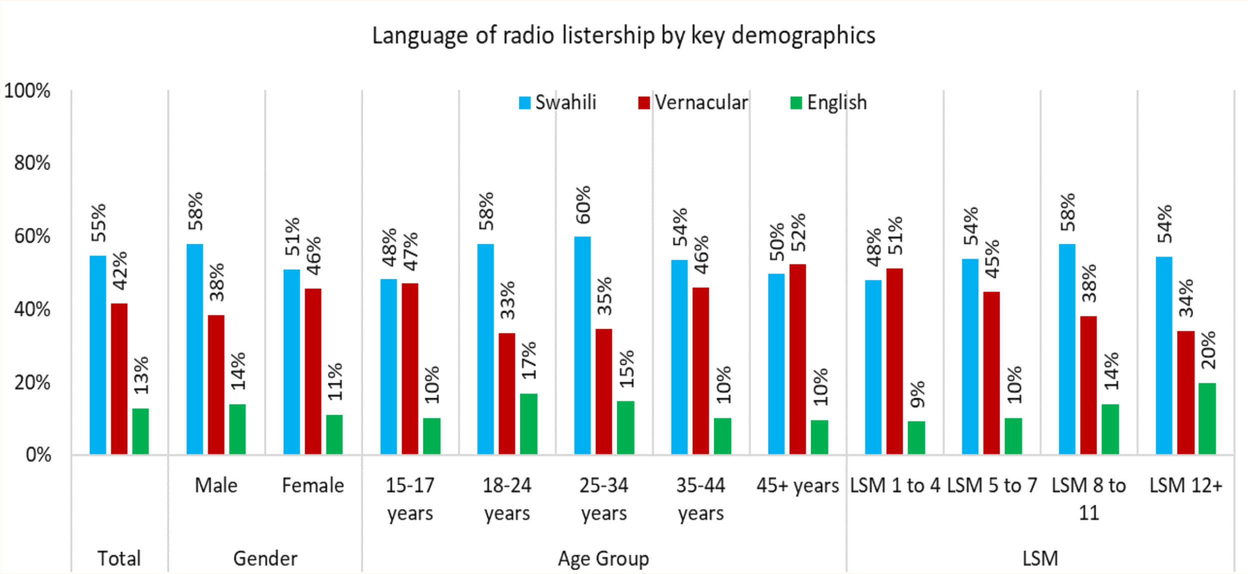
Radio consumption is highest in South Nyanza, Lake and Rift regions. The lowest incidence of radio listenership is recording in North Eastern. There is also higher listenership in the rural areas.




*Source: CA National Surveys - July - October 2023 Survey*

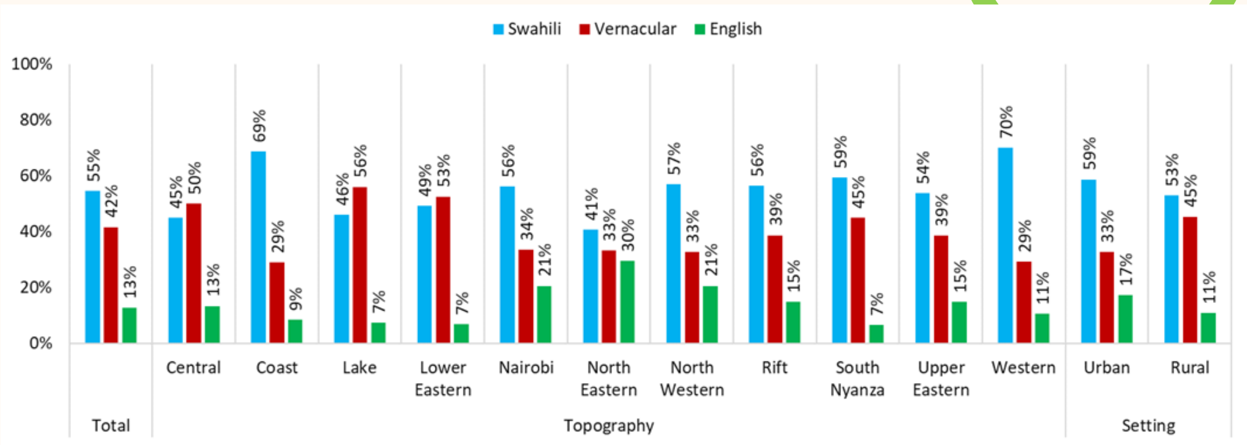
### 3.2. Radio Listenership Language Demographics

Swahili is the language most of the stations tuned into followed by vernacular. The higher incidence of English is amongst the LSM 12+ groups.




*Source: CA National Surveys - July - October 2023 Survey*

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

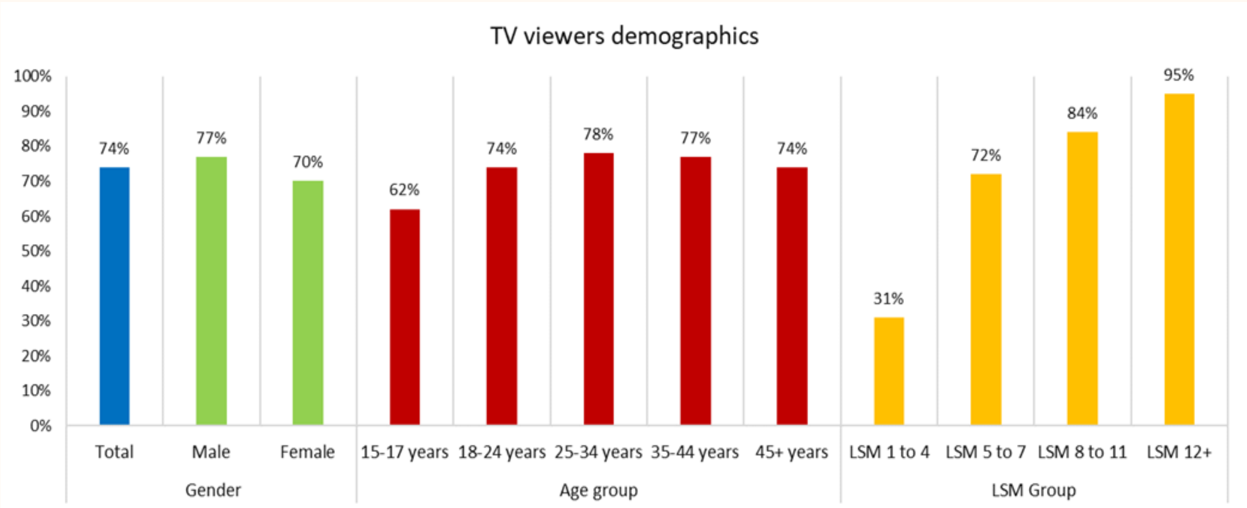



*Source: CA National Surveys - July - October 2023 Survey*

## 4. TV Viewership Section

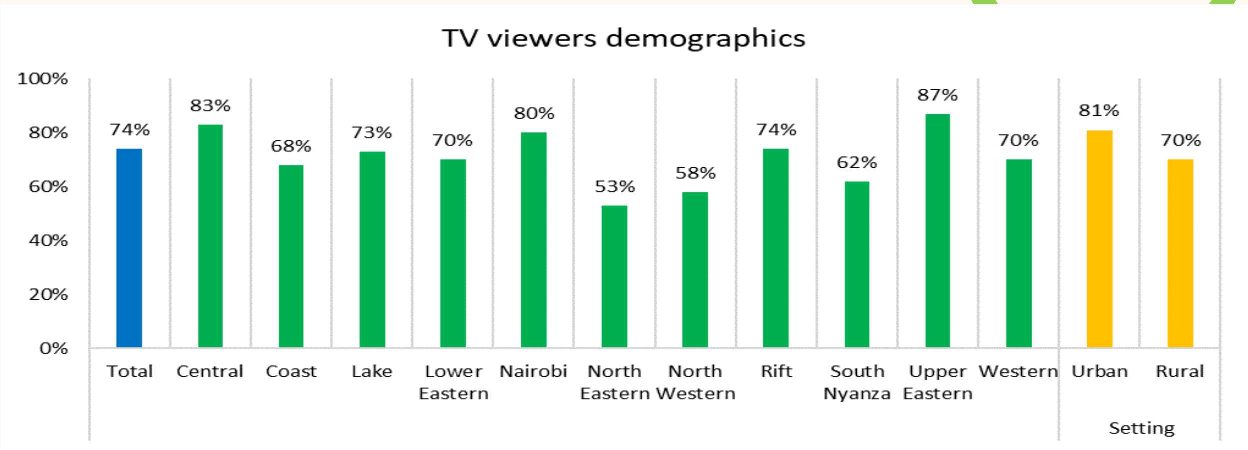
### 4.1. TV Viewer's Key Demographics

Viewership of TV is higher amongst males than females. Those aged 15 to 17 years have lower viewership as they are likely to be in school. The lower LSM 1 to 4 have lower viewership as they may not have access or own a TV set.




*Source: CA National Surveys - July - October 2023 Survey*

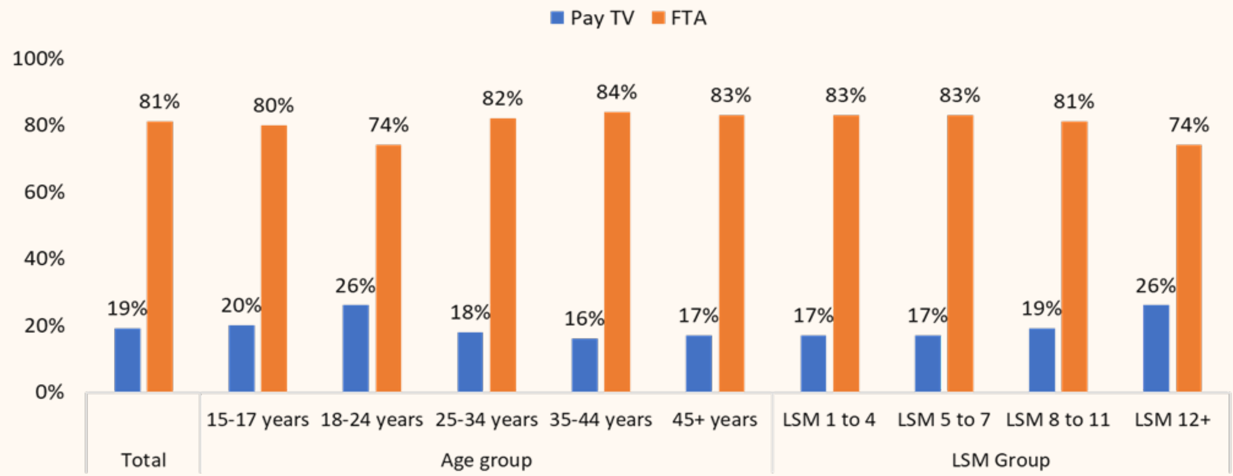
Viewership of TV is highest in Upper Eastern followed by Central and Nairobi topographies. The lowest incidence of TV Viewership is North Eastern. The viewership of TV is higher in urban areas.




*Source: CA National Surveys - July - October 2023 Survey*

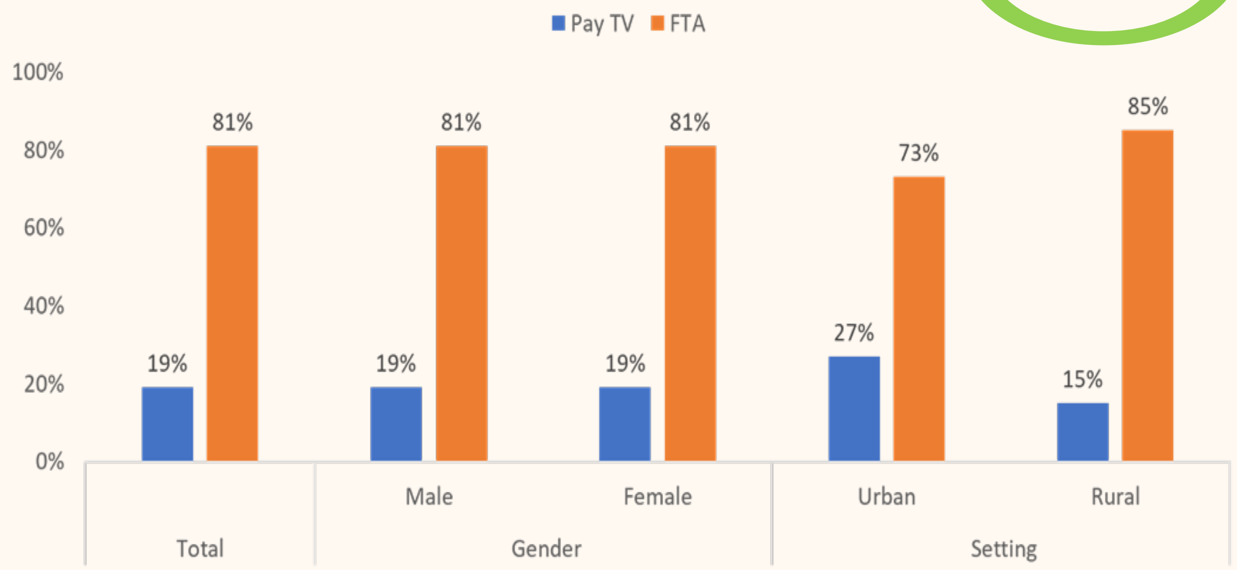
### 4.2. TV Reach – Pay TV vs Free to Air (FTA)

In Kenya, Free to Air (FTA) TV enjoys a notably broader viewership compared to pay TV. However, the reach of pay TV is slightly higher among individuals aged 18 to 24 years.




*Source: CA National Surveys - July - October 2023 Survey*

For both Pay TV and FTA TV, reach does not vary by gender. However, in urban areas, pay TV access is higher than rural areas.

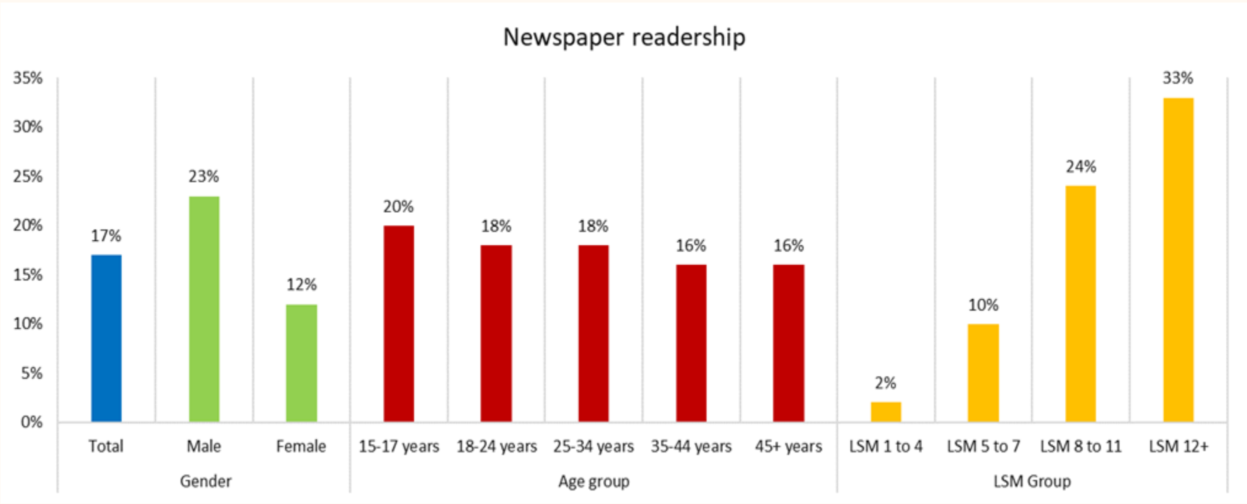



*Source: CA National Surveys - July - October 2023 Survey*

## 5. Internet Usage

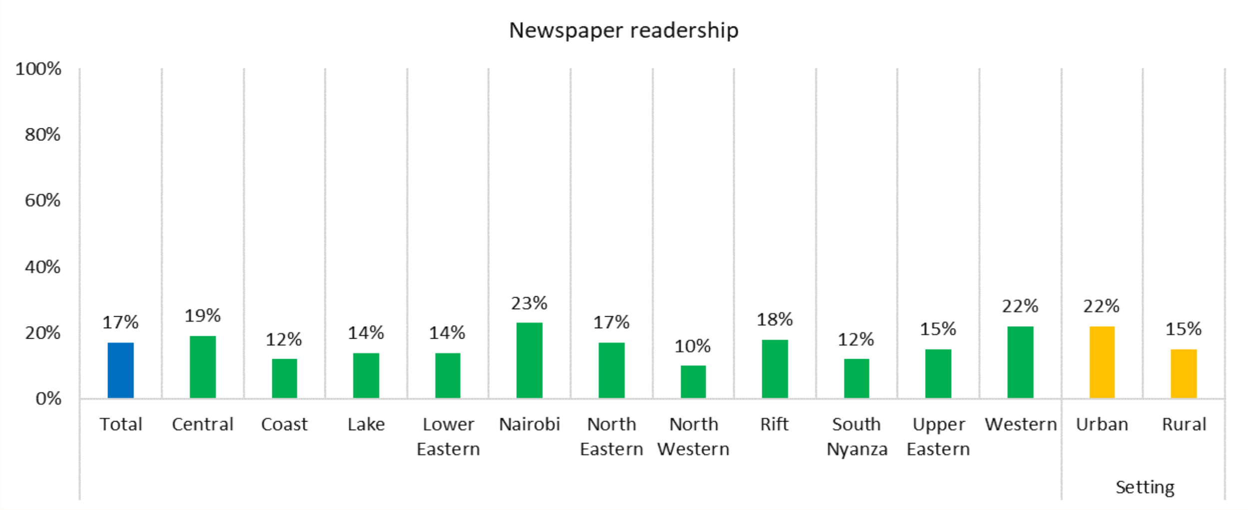
### 5.1. Newspaper Readership Demographics

There are more males who read newspapers as compared to females. In terms of age, readership is fairly similar. The higher LSMs have a higher incidence of readership.




*Source: CA National Surveys - July - October 2023 Survey*

Higher readership incidences are reported in Nairobi and Western topographies and also in urban areas.

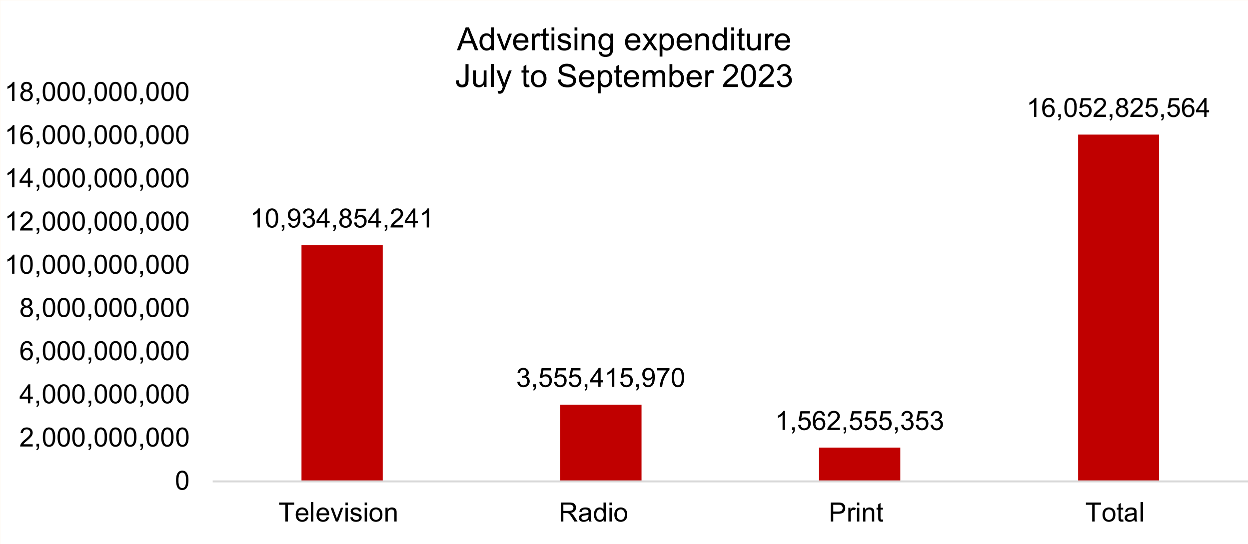



*Source: CA National Surveys - July - October 2023 Survey*

## 6. Advertising Expenditure

### 6.1. Advertising Expenditure Overview

The overall industry expenditure is Kes 16 billion with the highest allocation going to TV advertising.

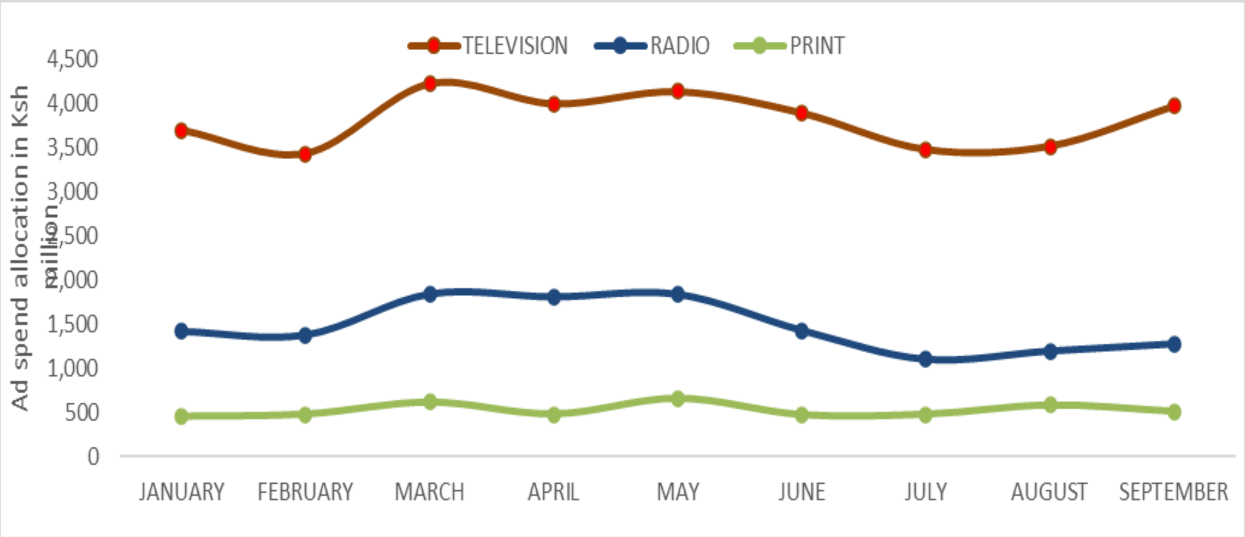



The share of advertising spends on TV remained constant through the three months. The total advertising spend was Kes 5b in July, 5.3b in August and 5.7b in September 2023. Compared to the same period last year, the quarterly ad spend has reduced by 19%. Overall, media spending has decreased due to government budget cuts, and brands are currently prioritizing market retention by implementing targeted exposure strategies with minimal spending. Additionally, brands with a wider product portfolio opt for a range of product campaigns and intermittent exposure. The expenditure on a combination of TV, radio and print declined by 15% in July and increased by 5% and 8% respectively in August and September 2023.

| Media | January | February | March | April | May | June | July | August | September |
|---|---|---|---|---|---|---|---|---|---|
| Television | 3,689 | 3,424 | 4,221 | 3,990 | 4,129 | 3,885 | 3,467 | 3,506 | 3,963 |
| Radio | 1,411 | 1,371 | 1,837 | 1,805 | 1,833 | 1,423 | 1,095 | 1,190 | 1,271 |
| Print | 451 | 476 | 614 | 478 | 658 | 469 | 474 | 581 | 508 |
| **Grand Total** | **5,552** | **5,271** | **6,672** | **6,273** | **6,621** | **5,777** | **5,035** | **5,276** | **5,742** |
| % growth | | -5% | 21% | -6% | 5% | -15% | -15% | 5% | 8% |

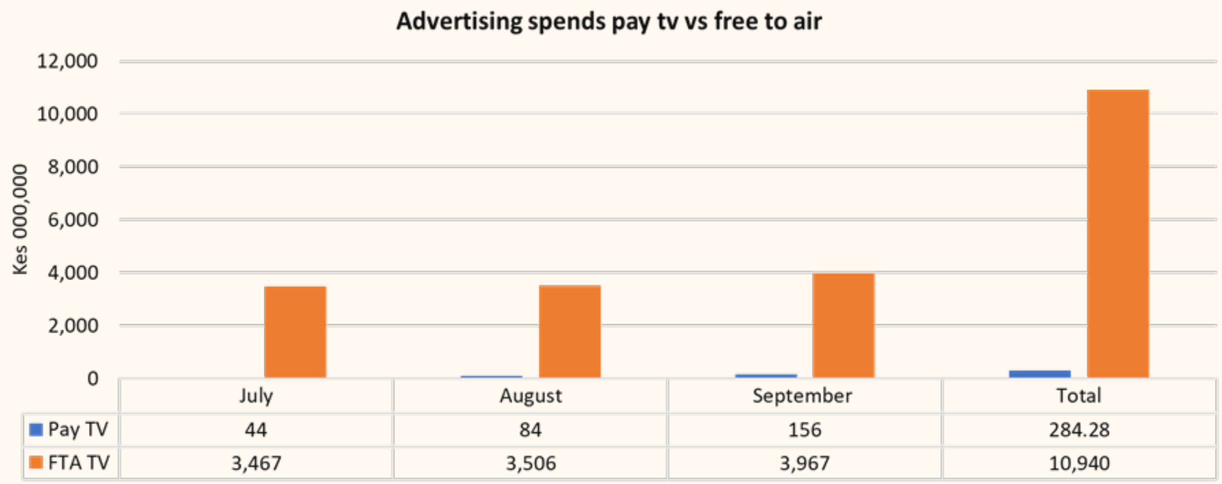
### 6.2. Year to Date Advertising Trends

Overall spending experienced a 14% decline compared to the same period last year due to low consumer purchasing power, anti-government protests and skyrocketing commodity prices.



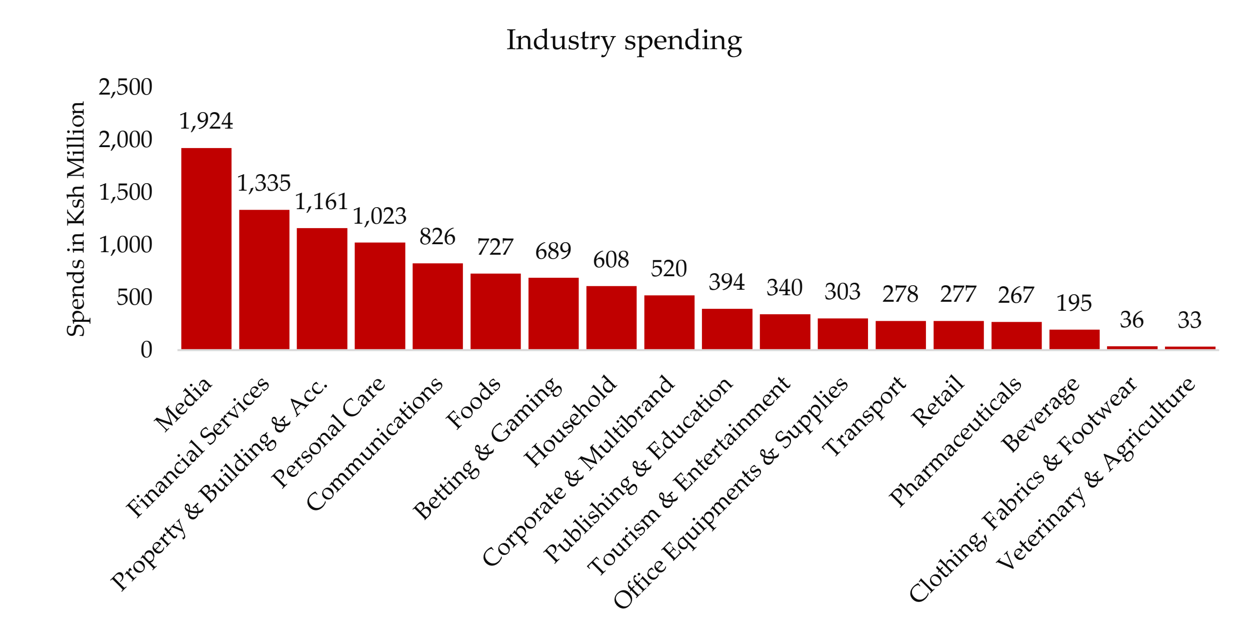

### 6.3. TV Advertising Expenditure – Pay TV and Free to Air

The predominant allocation of advertising spending is directed towards free-to-air TV, highlighting its central role in the advertising landscape. This emphasis on free-to-air TV underscores its effectiveness in reaching a wide and diverse audience.



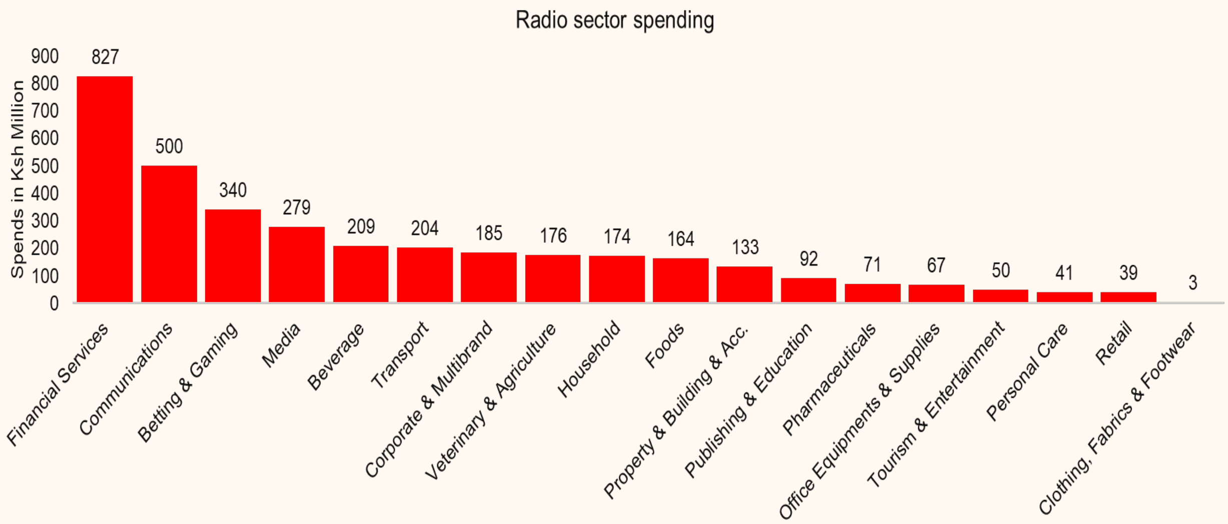

### 6.4. TV Spends by Sector/Industry

Digital content, the Africa climate summit, CSR activities, fintech, and real estate media activities accounted for a significant portion of TV media buying.



### 6.5. Radio Spends by Sector/Industry

Financial services and communications have the highest advertising spend on radio.




### 6.6. Print Spends by Sector/Industry

The highest spends distribution is on corporate and multi-brand and media. Financial services are at a distant third place.