AUDIENCE MEASUREMENT AND INDUSTRY TRENDS REPORT

FOURTH QUARTER FY 2023-2024
(April-June 2024)

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1. INTRODUCTION

Kenya's media landscape is celebrated for its diversity and sophistication. The radio broadcaster sector is particularly vibrant, with 293 FM radio stations offering a wide range of content listened to in quarter of 2023/24. This variety ensures that listeners have numerous options to choose from, catering to different tastes and preferences. In the fourth quarter of 2023/24, audiences had access to 360 television stations, which provide an extensive array of programming. Many of these TV and radio stations broadcast in multiple local languages, reflecting the country's rich cultural and linguistic heritage. This linguistic diversity helps ensure that content is accessible and relevant to various communities across Kenya, fostering a more inclusive media environment. The switch to digital terrestrial TV in 2015 led to a substantial increase in the number of television channels available. Furthermore, Kenya's widespread mobile phone usage has driven its Internet penetration to among the highest levels in Africa. Despite these advancements, the rapidly evolving media landscape in Kenya makes it challenging to capture and maintain a wide audience in a highly competitive environment.

In Kenya's vibrant and rapidly evolving media landscape, the importance of research cannot be overstated. For media organizations, policymakers, and stakeholders, research is an essential tool to navigate the complexities of this dynamic sector. It allows a better appreciation of audience preferences, emerging trends, and understanding the impact of various media platforms. Comprehensive research uncovers untapped opportunities, evaluates the effectiveness of content strategies, and refines methods for audience engagement.

Additionally, it offers crucial insights into the ever-evolving technological landscape, enabling media entities to adapt to new communication channels and digital innovations. In a competitive market where relevance is key, investing in research is not just beneficial but a strategic necessity to ensure the sustainability and growth of Kenya's media industry.

2. MEDIA AUDIENCE MEASUREMENT

2.1. Ways in Which Media is Consumed

Throughout the four quarters, consumption patterns remained consistent. Mobile phones make up about one-third of radio listenership, though traditional radio sets are still the primary means of listening. Television is predominantly watched on TV sets. Social media is mainly accessed via mobile phones and remains a key component of media consumption. Overall, these findings emphasize the diverse and interconnected ways people engage with different media channels today.

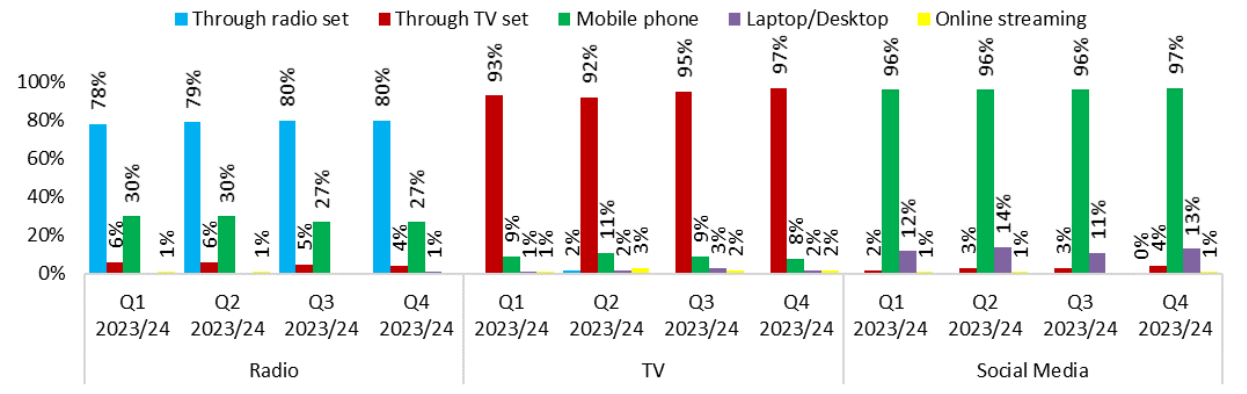


Figure 1: Ways in which media is consumed by total

2.2. Place of Media Consumption

From Q1 2023/24 to Q4 2023/24, there has been no significant shift in media consumption locations. The home continues to be the main place for engaging with media, with radio slightly surpassing television in this setting. At workplaces, radio is the preferred medium, while television content is more popular in social environments such as bars, restaurants, and hotels.

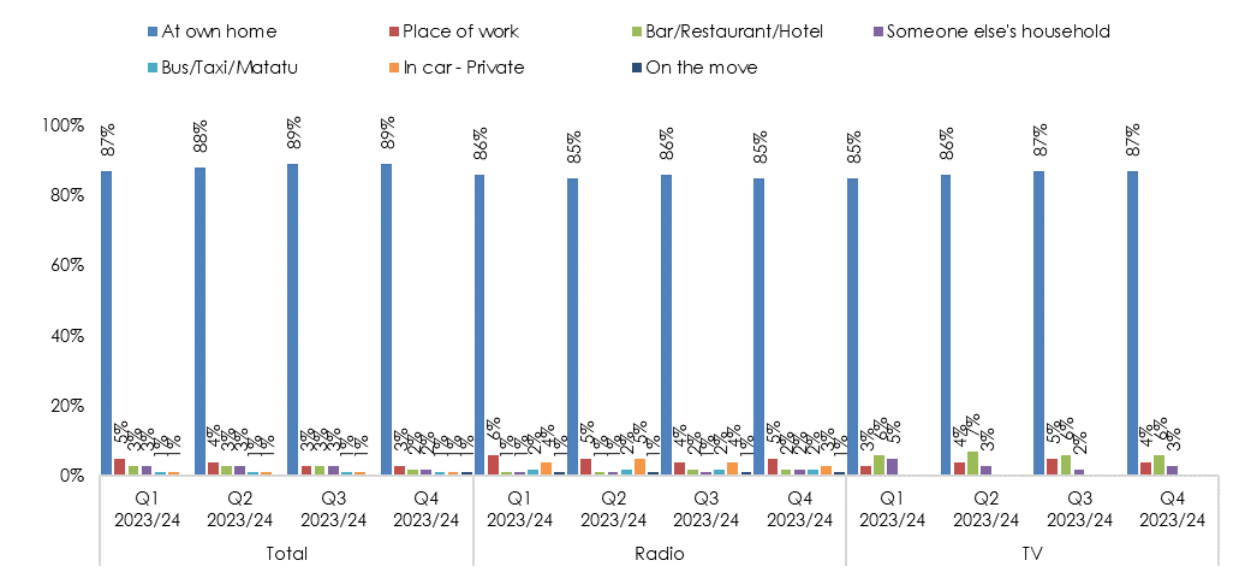


Figure 2: Place of media consumption by total

2.3. Access and usage of traditional media & digital media

A review of media consumption over the past week reveals that more than 76% of respondents identified watching TV and listening to the radio as their most popular activities. Although internet engagement remained stable, the current quarter's data shows a modest increase in both radio and television consumption. Conversely, there was a slight decrease in magazine and newspaper reading during this period.

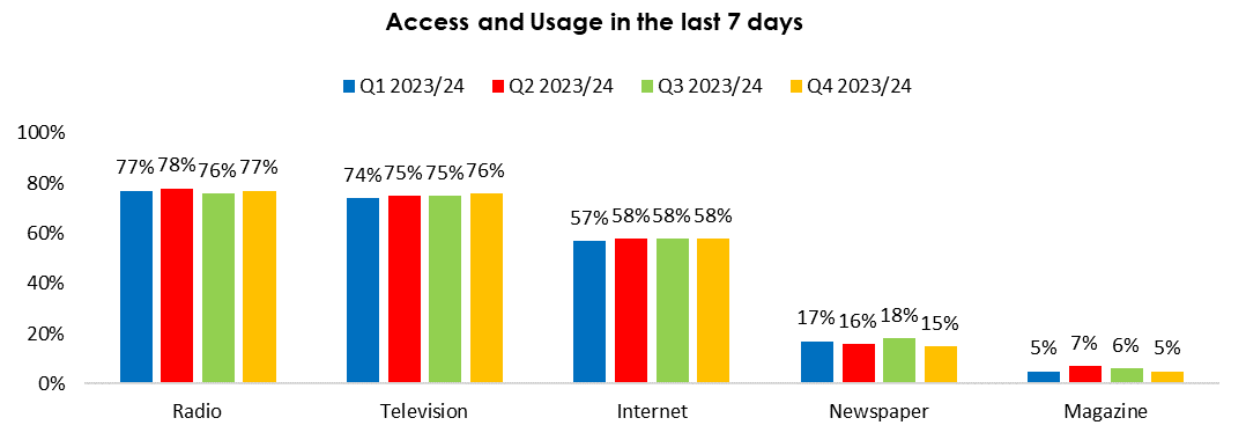


Figure 3: Access and Usage of media by total

The findings reveal a gender gap in media consumption, with male respondents engaging more with radio, TV, online newspapers, and magazines compared to female respondents.

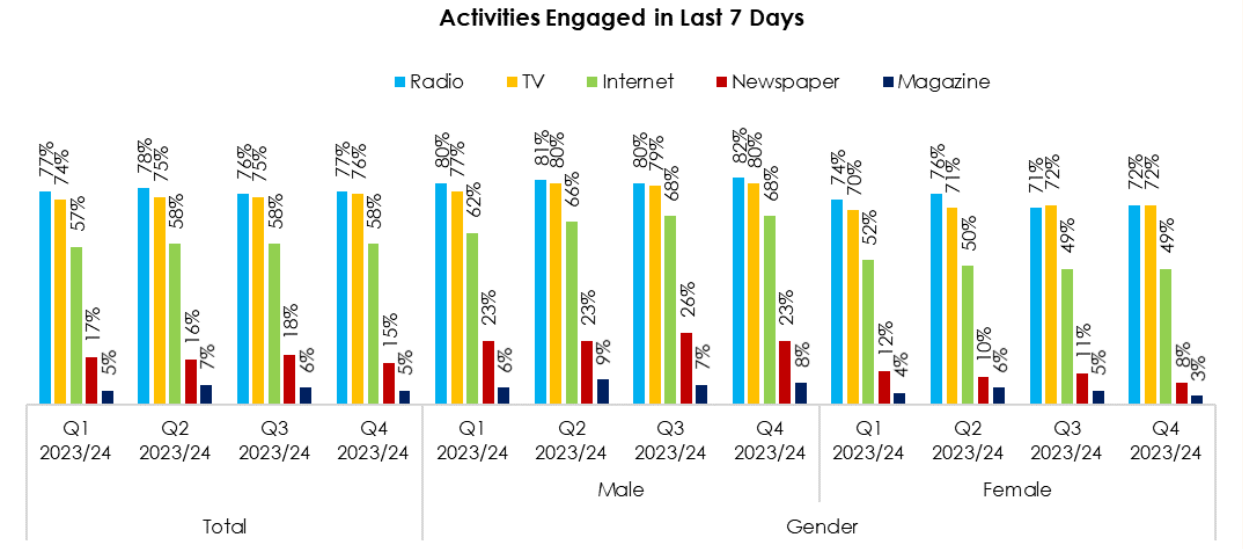


Figure 4: Activities Engaged in Last 7 Days - by total & gender

In the LSM 1 to 4 category, radio is more favored because it is more accessible and affordable than televisions. Many people in these lower LSM groups lack the infrastructure and electricity necessary for TV use, making battery-operated radios a more feasible option. In contrast, internet consumption rates are higher in urban areas and among individuals in the LSM 12+ category.

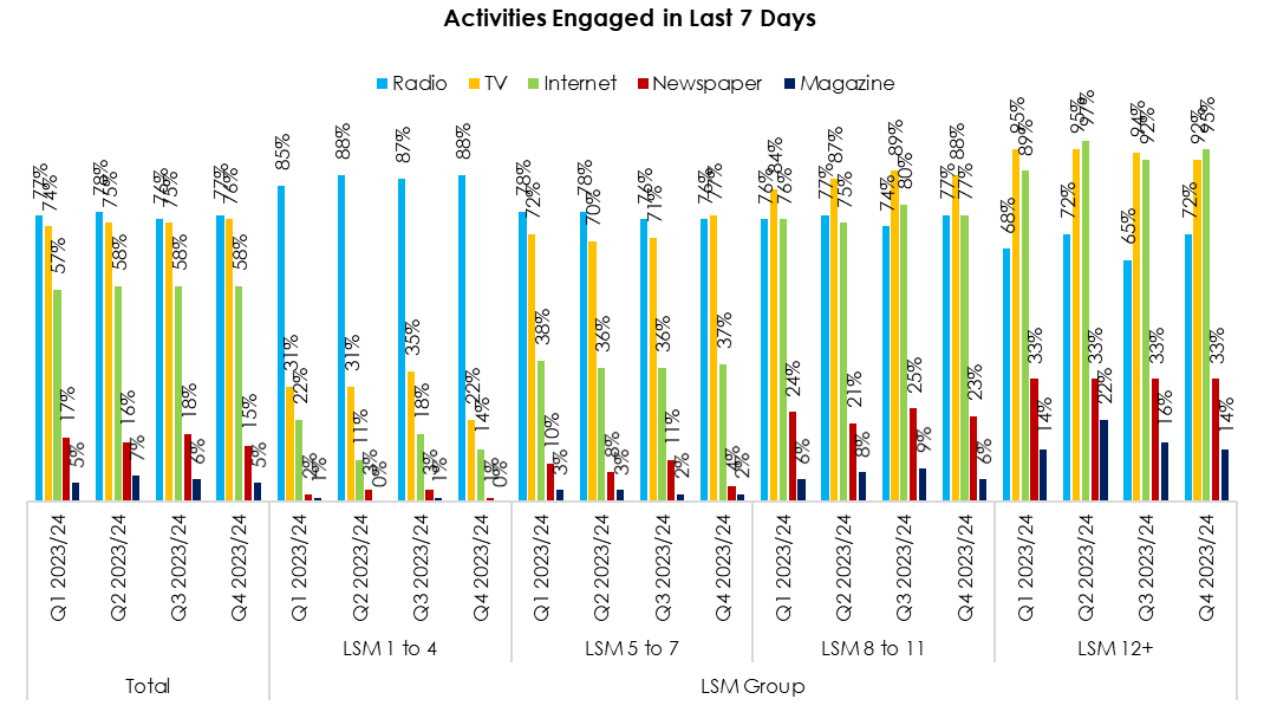


Figure 5: Activities Engaged in Last 7 Days - by total & LSM

The regions with the highest radio listenership are South Nyanza (86%), Upper Eastern (86%), Western (85%), and Lake (85%). Internet usage is most common in Nairobi, where 80% of people use it. The Central regions also exhibit notably high television consumption at 86%. There are regional variations in newspaper reading, with South Nyanza showing a significant increase of 6%.

Table 1: Activities Engaged in Last 7 Days - by Topography

	FY	Radio	TV	Internet	Newspaper	Magazine
Total	Q1 2023/24	77%	74%	57%	17%	5%
	Q2 2023/24	78%	75%	58%	16%	7%
	Q3 2023/24	76%	75%	58%	18%	6%
	Q4 2023/24	77%	76%	58%	15%	5%
Central	Q1 2023/24	81%	83%	59%	19%	5%
	Q2 2023/24	80%	87%	57%	15%	6%
	Q3 2023/24	76%	82%	62%	16%	4%
	Q4 2023/24	76%	86%	61%	19%	7%
Coast	Q1 2023/24	68%	68%	53%	12%	5%
	Q2 2023/24	73%	73%	53%	14%	8%
	Q3 2023/24	62%	72%	52%	13%	5%
	Q4 2023/24	68%	67%	64%	11%	3%
Lake	Q1 2023/24	84%	73%	51%	14%	4%
	Q2 2023/24	83%	72%	53%	16%	11%

	Q3 2023/24	83%	75%	49%	27%	7%
	Q4 2023/24	85%	82%	51%	14%	3%
Lower Eastern	Q1 2023/24	78%	70%	49%	14%	3%
	Q2 2023/24	85%	80%	43%	16%	5%
	Q3 2023/24	83%	73%	45%	16%	6%
	Q4 2023/24	80%	65%	44%	12%	6%
Nairobi	Q1 2023/24	64%	80%	75%	23%	7%
	Q2 2023/24	69%	81%	83%	21%	8%
	Q3 2023/24	65%	81%	81%	22%	8%
	Q4 2023/24	64%	84%	80%	16%	7%
North Eastern	Q1 2023/24	54%	53%	64%	17%	3%
	Q2 2023/24	62%	46%	70%	18%	2%
	Q3 2023/24	56%	51%	65%	13%	4%
	Q4 2023/24	58%	52%	74%	12%	7%
North Western	Q1 2023/24	68%	58%	56%	10%	0%
	Q2 2023/24	74%	70%	62%	11%	3%
	Q3 2023/24	74%	69%	57%	11%	1%
	Q4 2023/24	72%	73%	65%	11%	1%
Rift	Q1 2023/24	83%	74%	63%	18%	5%
	Q2 2023/24	82%	71%	62%	20%	11%
	Q3 2023/24	82%	80%	63%	22%	10%
	Q4 2023/24	84%	71%	53%	16%	4%
South Nyanza	Q1 2023/24	85%	62%	44%	12%	2%
	Q2 2023/24	78%	57%	41%	7%	5%
	Q3 2023/24	76%	70%	43%	15%	8%
	Q4 2023/24	86%	72%	54%	21%	10%
Upper Eastern	Q1 2023/24	77%	87%	49%	15%	4%
	Q2 2023/24	71%	71%	47%	17%	9%
	Q3 2023/33	79%	79%	54%	18%	7%
	Q4 2023/33	86%	83%	43%	18%	7%
Western	Q1 2023/24	82%	70%	52%	22%	8%
	Q2 2023/24	85%	74%	57%	17%	6%
	Q3 2023/34	82%	71%	52%	17%	7%
	Q4 2023/34	85%	74%	53%	15%	2%

2.4. Number of Media Consumed

The data for Q4 2023–2024 shows a minor increase in the use of two media types, with the percentage of participants utilizing various media platforms rising by 0.8%. However, there was a slight decline in multimedia consumption, indicating a shift away from the trend towards a more interconnected media landscape, with a 0.9% decrease in respondents engaging with multiple media platforms.

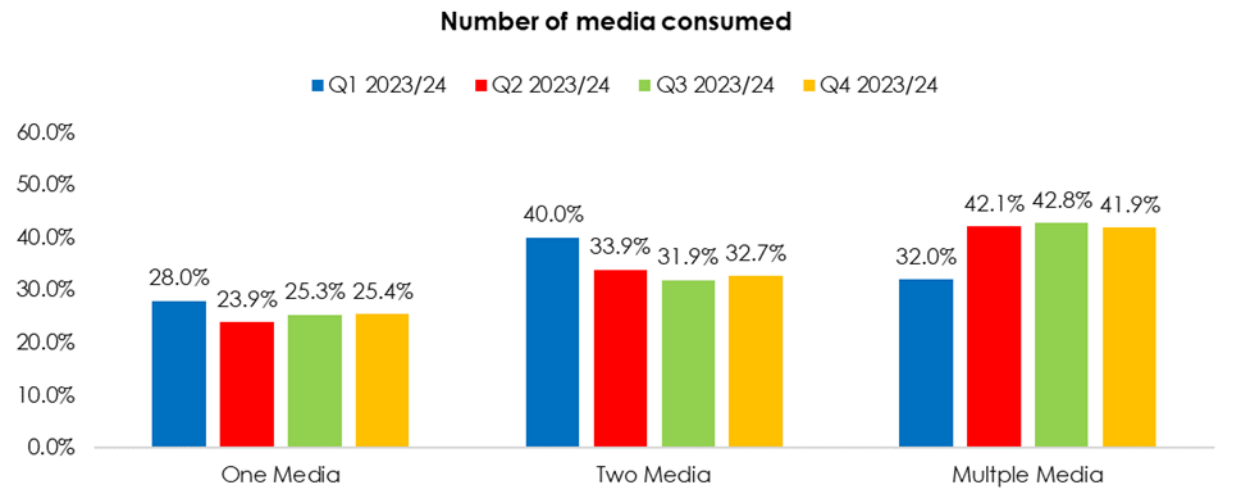


Figure 6: Number of media consumed by total

2.5. Type of Media Consumed

Throughout the four quarters, a prominent trend in media consumption has been the integration of multiple platforms, including radio, television, and online mediums. This combined media usage made up 26% of total media consumption during the fourth quarter of the fiscal year 2023/24. This indicates that **a** substantial portion of the population is engaging with various media formats simultaneously, encompassing radio broadcasts, television programming, and online content.

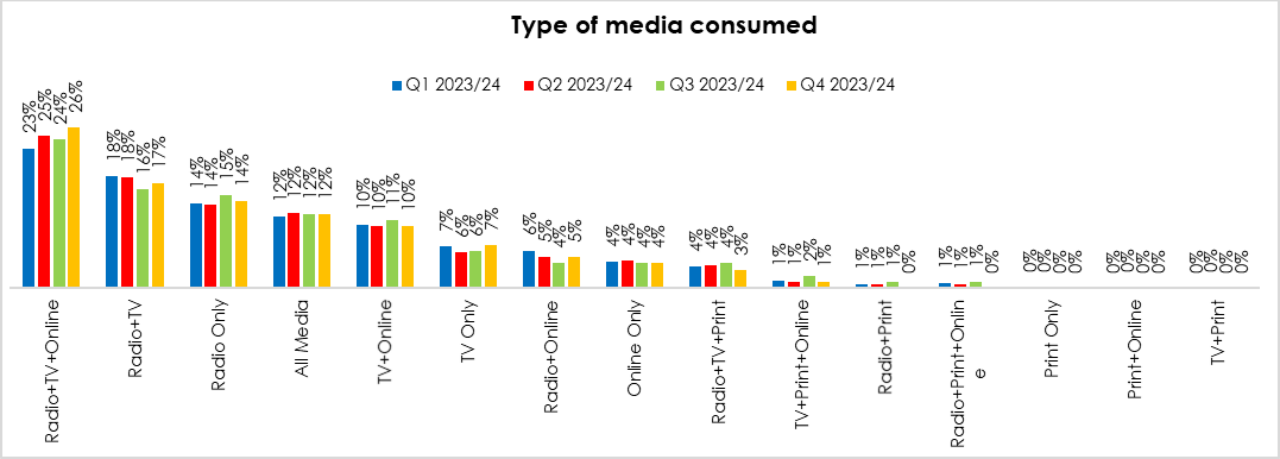


Figure 7: Type of media Consumed by total

2.6. Frequency of Media Consumption

There was an increase in daily TV consumption to 54% in Q4 2023/24, up from 52% in Q3 2023/24. In contrast, radio consumption saw a slight decrease to 51% in Q4 2023/24. During the same period, daily participation in social media decreased from 47% to 45%.

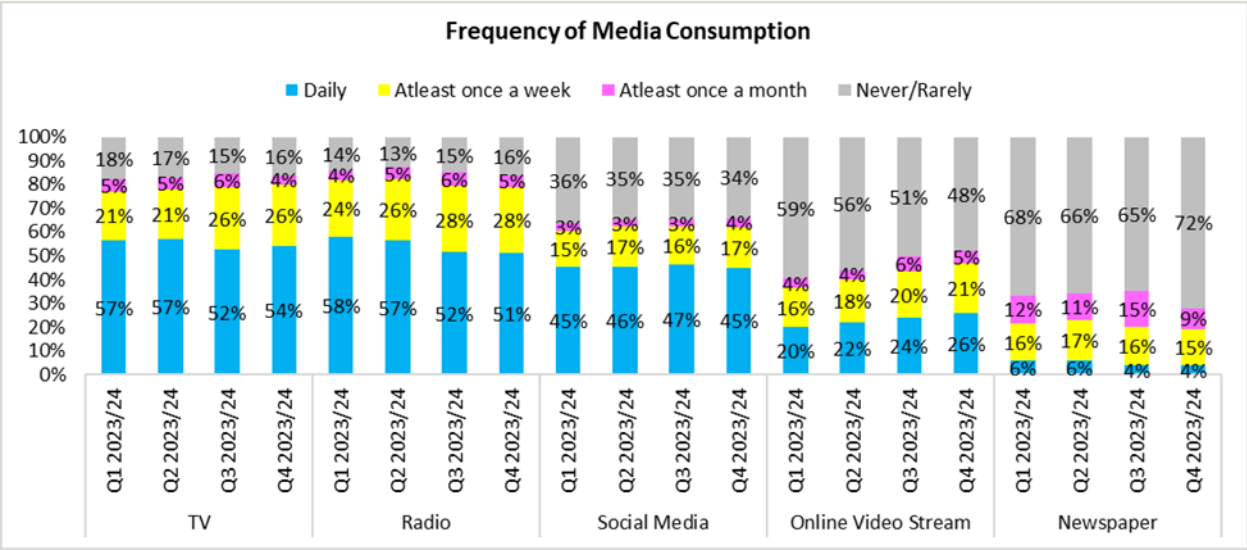


Figure 8: Frequency of consuming Tv, radio, social media, online streams and newspapers

2.7. Demographics of Media Consumers

Using population census projections, the media consumer population is indicated in the table. In addition, the demographics profiles of media audiences are illustrated below.

Table 2: Demographics of media consumers in Kenya – LSM, age, setting and gender

Demographics		Financial Year	Radio Listeners, n=24.8M	TV Viewers, n=24.8M	Newspaper Readership, n=6.0M	Online Usage, n=19.1M
Gender	Male	Q1 2023/24	51%	52%	65%	54%
		Q2 2023/24	51%	52%	69%	56%
		Q3 2023/24	52%	52%	70%	57%
		Q4 2023/24	52%	52%	74%	58%
	Female	Q1 2023/24	49%	48%	35%	46%
		Q2 2023/24	49%	48%	31%	44%
		Q3 2023/24	48%	48%	30%	43%
		Q4 2023/24	48%	48%	26%	42%
Age group	15-17 years	Q1 2023/24	12%	10%	14%	13%
		Q2 2023/24	11%	10%	10%	14%
		Q3 2023/24	12%	12%	12%	13%
		Q4 2023/24	12%	10%	12%	13%

	18-24 years	Q1 2023/24	22%	23%	24%	30%
		Q2 2023/24	22%	24%	24%	29%
		Q3 2023/24	21%	24%	23%	31%
		Q4 2023/24	20%	23%	21%	29%
	25-34 years	Q1 2023/24	26%	28%	28%	32%
		Q2 2023/24	26%	28%	30%	31%
		Q3 2023/24	26%	27%	28%	30%
		Q4 2023/24	24%	25%	26%	28%
	35-44 years	Q1 2023/24	20%	20%	17%	16%
		Q2 2023/24	21%	19%	20%	15%
		Q3 2023/24	20%	19%	19%	15%
		Q4 2023/24	17%	18%	16%	15%
	45+ years	Q1 2023/24	20%	19%	17%	10%
		Q2 2023/24	20%	19%	17%	11%
		Q3 2023/24	20%	18%	18%	10%
		Q4 2023/24	27%	24%	24%	14%
Setting	Urban	Q1 2023/24	28%	36%	42%	42%
		Q2 2023/24	30%	36%	44%	43%
		Q3 2023/24	29%	36%	38%	43%
		Q4 2023/24	28%	34%	37%	44%
	Rural	Q1 2023/24	72%	64%	58%	58%
		Q2 2023/24	70%	64%	57%	57%
		Q3 2023/24	71%	64%	62%	57%
		Q4 2023/24	72%	66%	63%	56%
LSM Group	LSM 1 to 4	Q1 2023/24	16%	6%	2%	6%
		Q2 2023/24	16%	6%	3%	3%
		Q3 2023/24	19%	8%	3%	5%
		Q4 2023/24	15%	4%	1%	3%
	LSM 5 to 7	Q1 2023/24	33%	32%	18%	22%
		Q2 2023/24	30%	28%	14%	19%
		Q3 2023/24	30%	28%	19%	19%
		Q4 2023/24	31%	32%	9%	20%
	LSM 8 to 11	Q1 2023/24	40%	46%	56%	53%
		Q2 2023/24	41%	48%	54%	54%
		Q3 2023/24	41%	50%	57%	58%
		Q4 2023/24	40%	46%	59%	52%
	LSM 12+	Q1 2023/24	11%	16%	23%	19%
		Q2 2023/24	13%	18%	29%	24%
		Q3 2023/24	10%	15%	21%	18%

		Q4 2023/24	14%	18%	31%	24%

3. Radio Listenership Section

3.1. Radio Listeners' Key Demographics

Among different demographic groups, males exhibit a greater preference for radio compared to females, with this trend being more evident among older individuals. Moreover, radio listenership shows a steady increase as age advances.

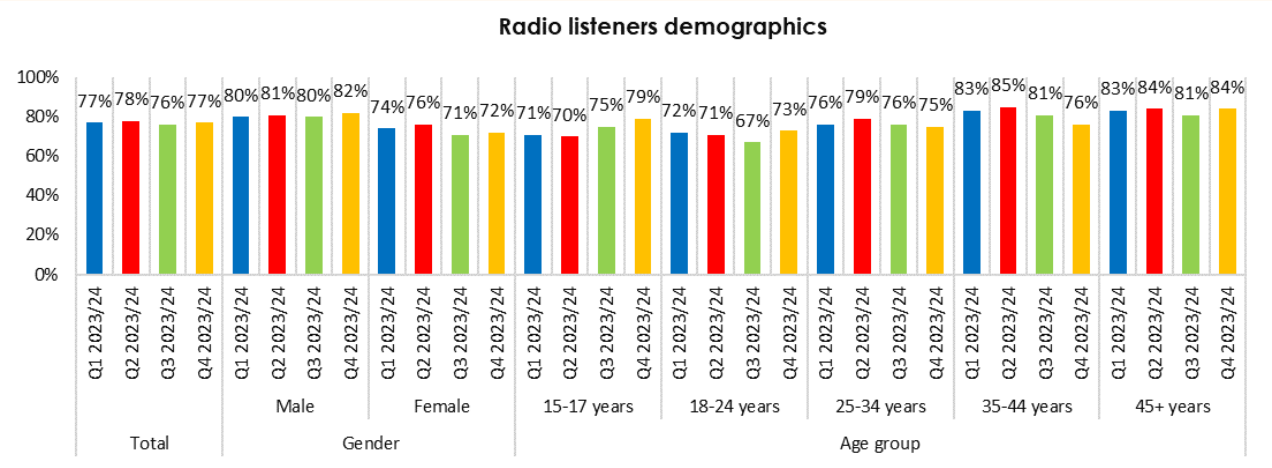


Figure 9: Demographics of radio consumers– by total, gender

Rural areas have higher radio listenership compared to urban areas, and lower LSMs show the highest levels of radio consumption compared to higher LSMs.

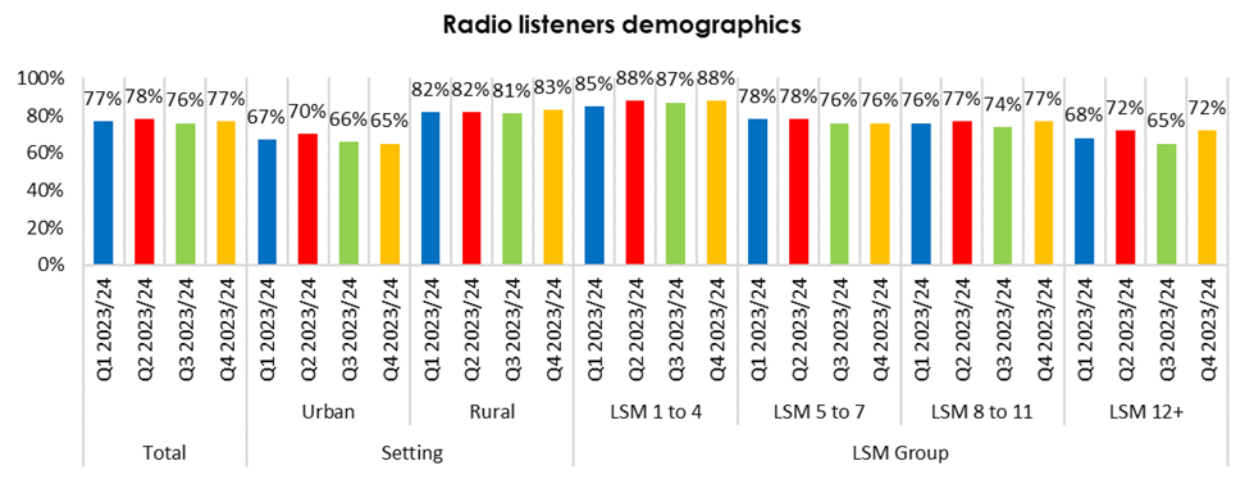


Figure 10: Demographics of radio consumers– by total, setting and LSM

Radio consumption is most prevalent in South Nyanza and Upper Eastern regions, while North Eastern shows the lowest rates of usage.

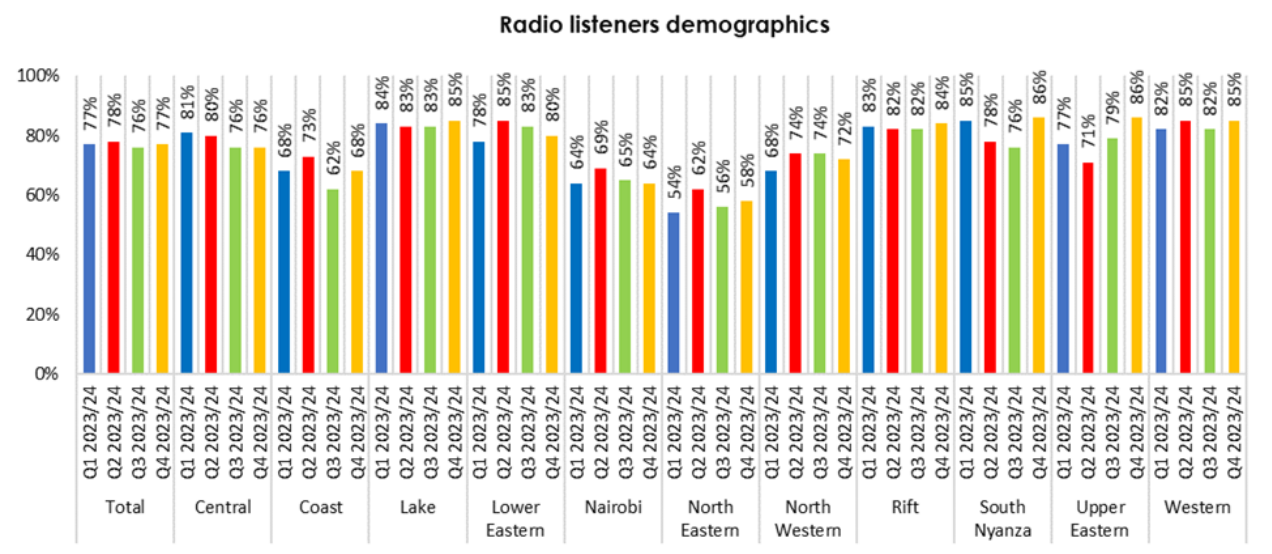


Figure 11: Demographics of radio consumers– by total, Topography

3.2. Radio Listenership Language

Swahili is the language most of the stations tuned into followed by vernacular. This observed across male and female listeners in all quarters.

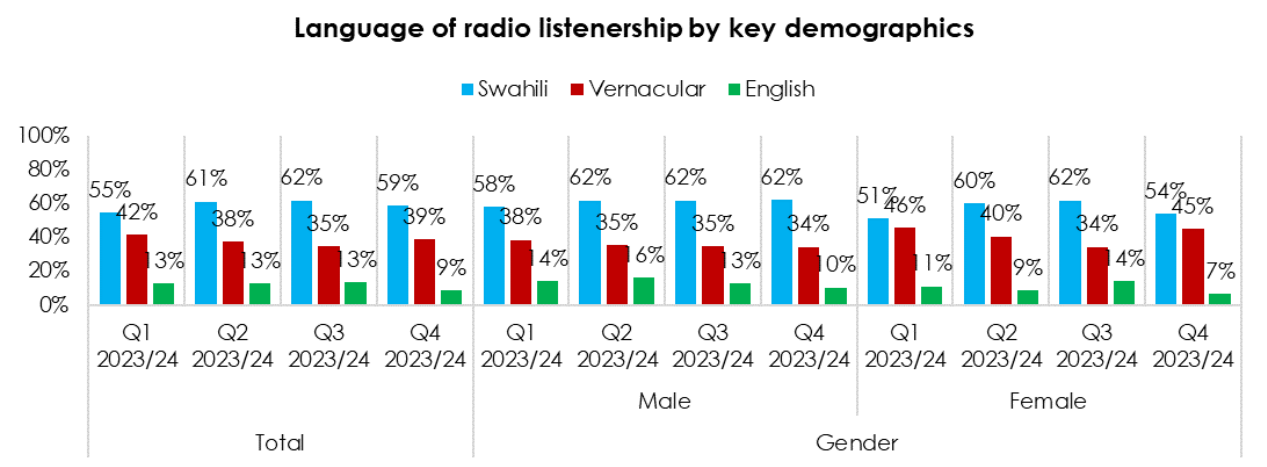


Figure 12: Radio listenership language by total and gender

Even though Swahili stations are the most tuned-in stations, there is higher usage of English stations in Rural areas compared to Urban areas. This was observed only from Q3 2023/24 to Q4 2023/24.

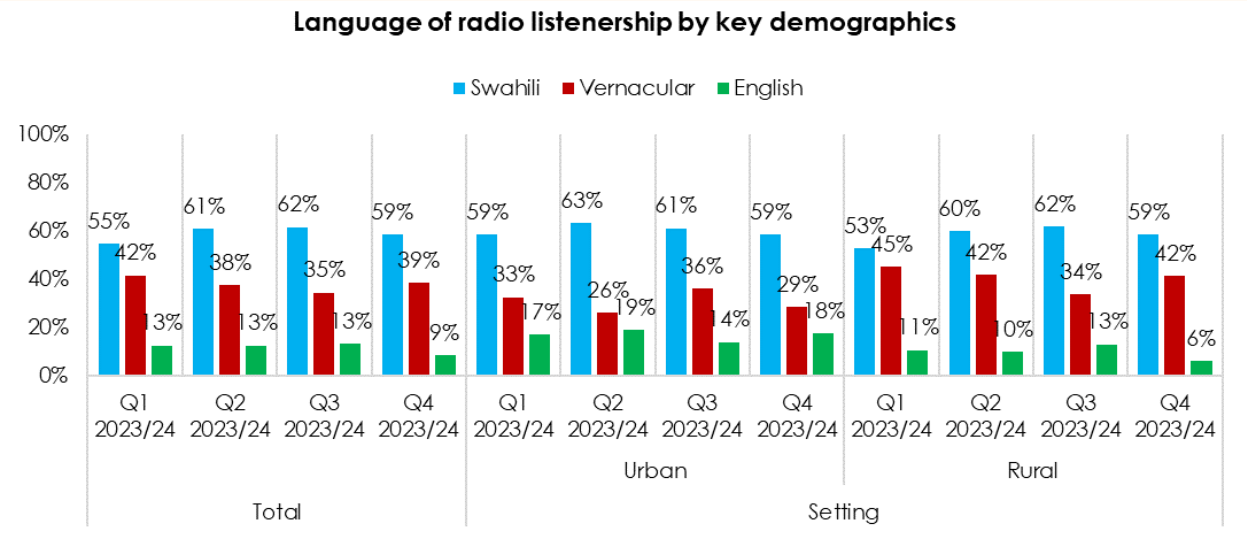


Figure 13: Radio listenership language by total & setting

Kiswahili is more commonly spoken in both urban and rural populations especially those in LSM 5 to 11. This might be due to its more frequent use in everyday conversations.

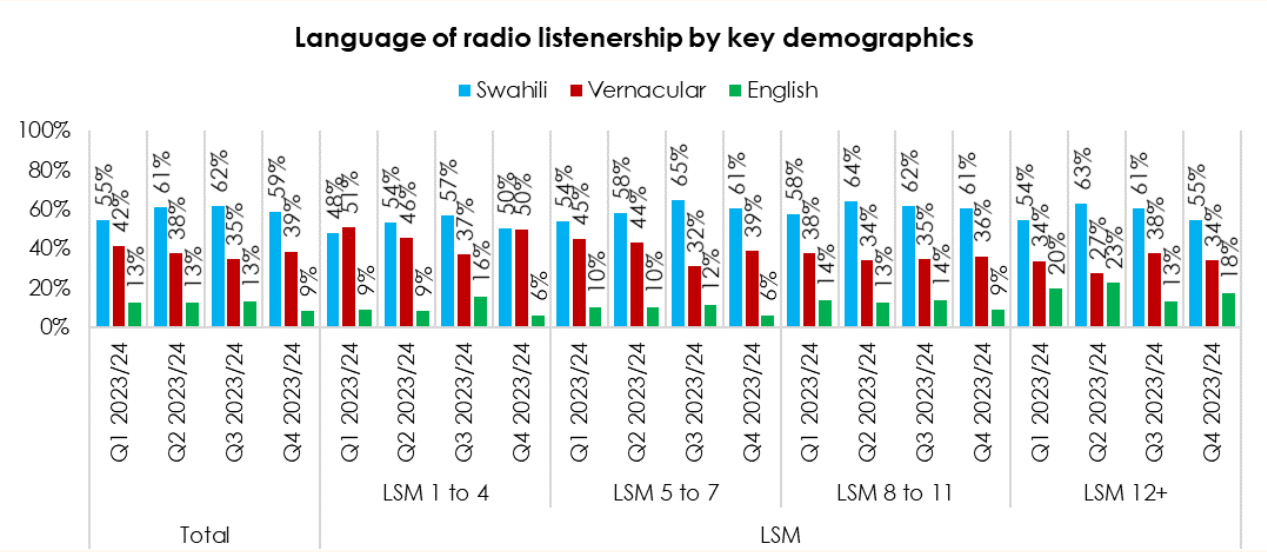


Figure 14: Radio listenership language by total & LSM

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

Table 3: Radio listenership language by total and topography

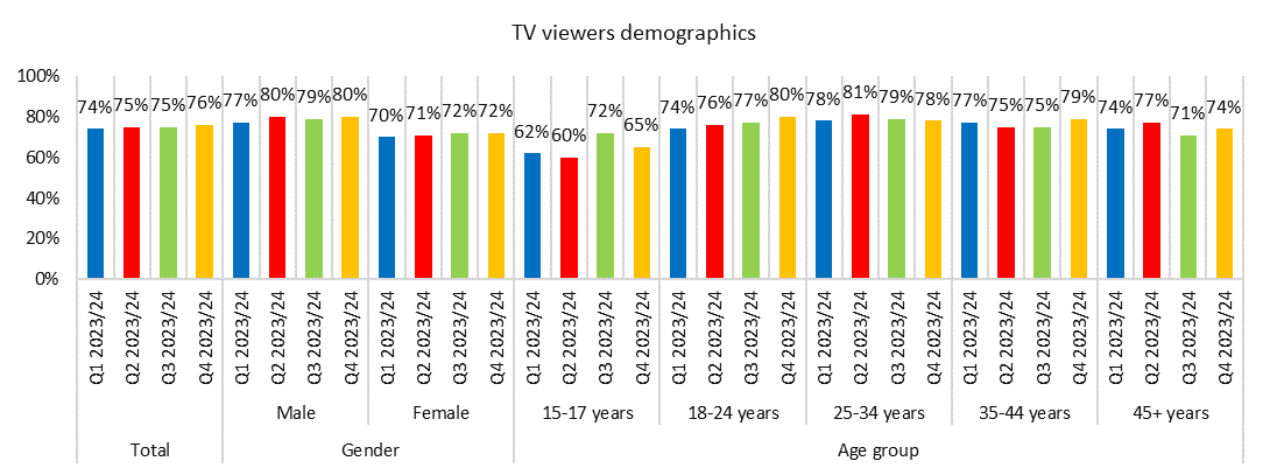
Total/ Topography		Financial Year	Radio listenership language		
			Swahili	Vernacular	English
Total		Q1 2023/24	55%	42%	13%
		Q2 2023/24	61%	38%	13%
		Q3 2023/24	62%	35%	13%
		Q4 2023/24	59%	39%	9%
Topography	Central	Q1 2023/24	45%	50%	13%
		Q2 2023/24	45%	50%	13%
		Q3 2023/24	62%	36%	12%
		Q4 2023/24	42%	54%	10%
	Coast	Q1 2023/24	69%	29%	9%
		Q2 2023/24	77%	20%	10%
		Q3 2023/24	62%	32%	16%
		Q4 2023/24	59%	32%	14%
	Lake	Q1 2023/24	46%	56%	7%
		Q2 2023/24	58%	49%	8%
		Q3 2023/24	60%	38%	13%
		Q4 2023/24	46%	60%	4%
	Lower Eastern	Q1 2023/24	49%	53%	7%
		Q2 2023/24	50%	53%	8%
		Q3 2023/24	58%	35%	15%
		Q4 2023/24	33%	66%	6%
	Nairobi	Q1 2023/24	56%	34%	21%
		Q2 2023/24	61%	21%	30%
		Q3 2023/24	64%	34%	14%
		Q4 2023/24	66%	15%	24%
	North Eastern	Q1 2023/24	41%	33%	30%
		Q2 2023/24	60%	21%	24%
		Q3 2023/24	61%	33%	13%
		Q4 2023/24	51%	27%	27%
	North Western	Q1 2023/24	57%	33%	21%
		Q2 2023/24	64%	22%	23%
		Q3 2023/24	67%	25%	19%
		Q4 2023/24	66%	33%	10%
	Rift	Q1 2023/24	56%	39%	15%
		Q2 2023/24	67%	34%	16%
		Q3 2023/24	67%	30%	12%
		Q4 2023/24	68%	29%	8%

	South Nyanza	Q1 2023/24	59%	45%	7%
		Q2 2023/24	58%	42%	10%
		Q3 2023/24	59%	46%	15%
		Q4 2023/24	79%	23%	5%
	Upper Eastern	Q1 2023/24	54%	39%	15%
		Q2 2023/24	53%	44%	12%
		Q3 2023/24	53%	39%	13%
		Q4 2023/24	46%	51%	9%
	Western	Q1 2023/24	70%	29%	11%
		Q2 2023/24	80%	24%	6%
		Q3 2023/24	61%	35%	12%
		Q4 2023/24	88%	15%	2%

4. TV Viewership Section

4.1. TV Viewer's Key Demographics

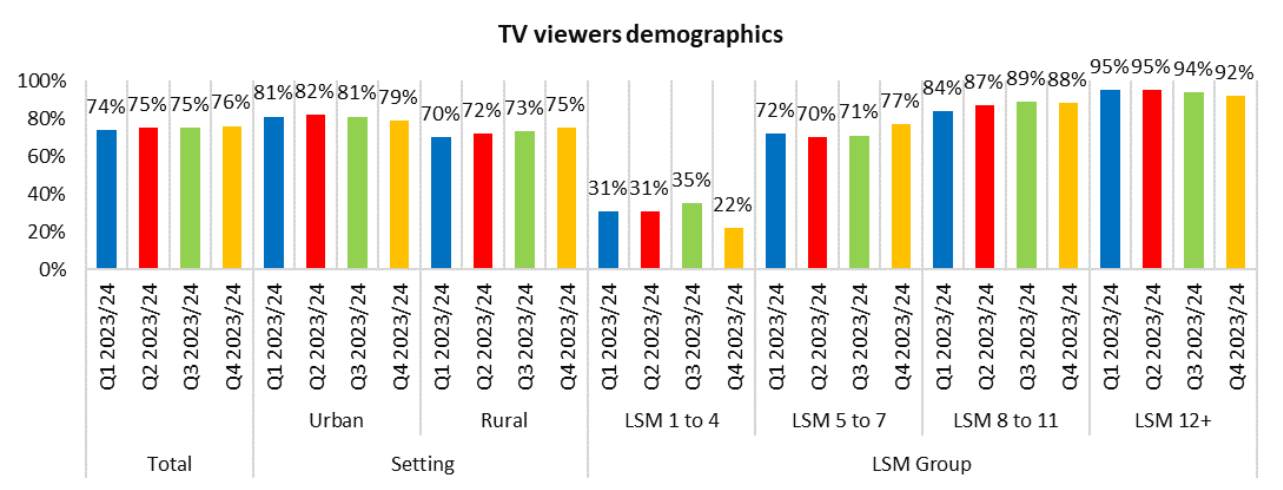
The data reveals gender gaps in TV watching, as males demonstrate greater interest across the four quarters. There is a decrease in viewership among 15- to 17-year-olds, indicates TV networks and streaming services are producing less content targeted specifically at teenagers, ignoring their interests and concerns. This may discourage more teens from watching TV despite their academic responsibilities.



N=32.23M: All Respondents

Figure 15: TV Viewership demographics – by total, gender and age group

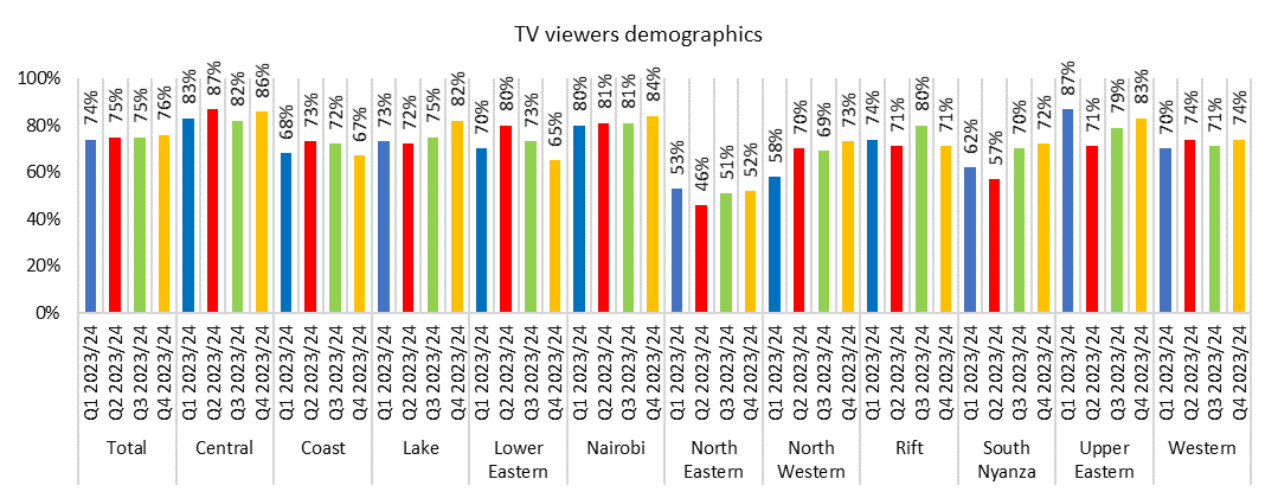
There is a decline in viewers in the lower LSM 1 to 4 segments and also in the lower LSM 8 to 11 and LSM 12+ segments, with decreases of 1% and 2% respectively. In contrast, there is an increase in viewers in the lower LSM 5 to 7 segment. These patterns highlight the influence of socioeconomic factors, such as limited access to television sets. This underscores the need for tailored strategies to address different demographic and socioeconomic factors in order to improve TV viewership.



N=32.23M: All Respondents

Figure 16: TV Viewership demographics – by total, setting and LSM

The Central region leads in TV viewership, with Nairobi and Upper Eastern following closely behind. In contrast, the Lower Eastern regions have the lowest TV viewership. These geographic differences in TV consumption highlight the need for customized media strategies tailored to specific regions.

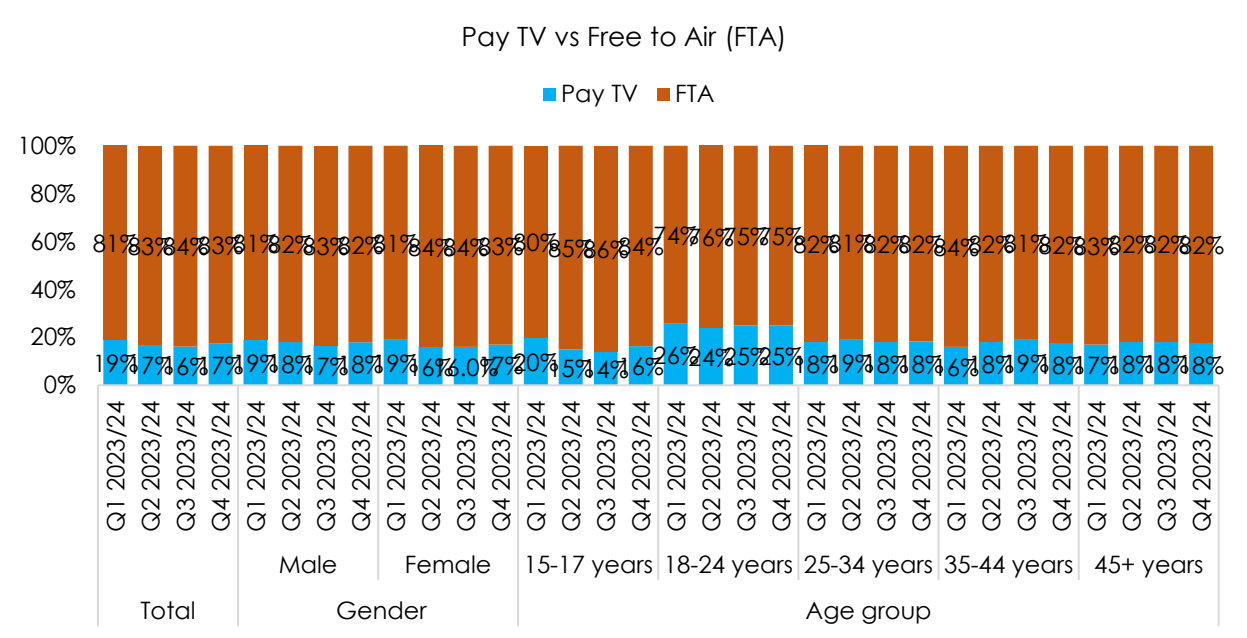


N=32.23M: All Respondents

Figure 17: TV Viewership demographics – by total and topography

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

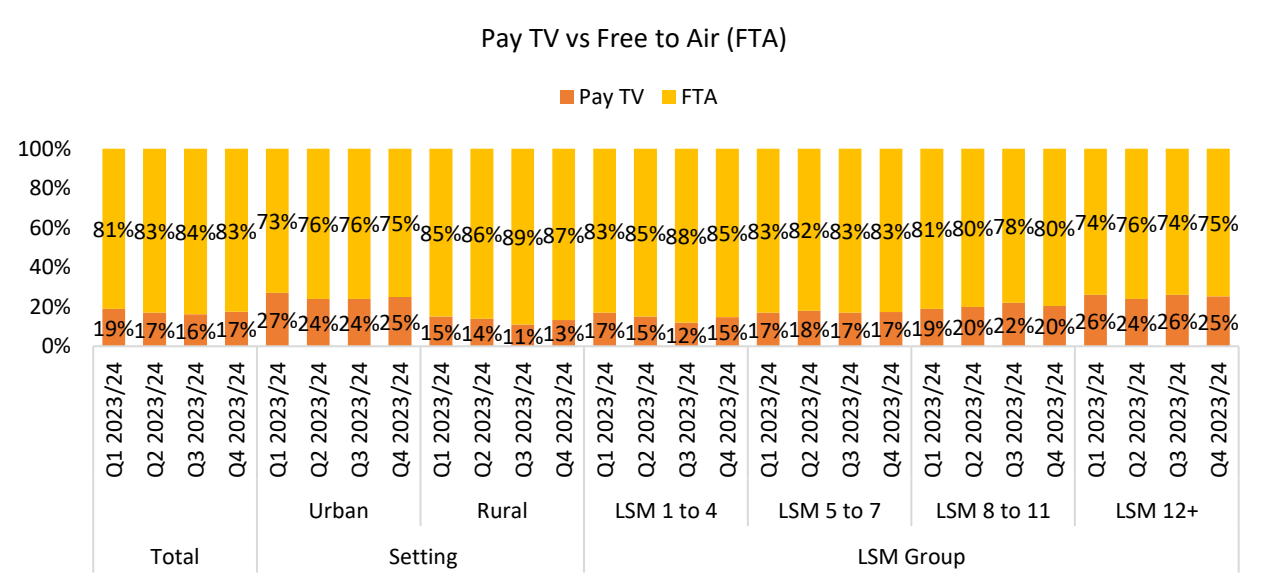
In Kenya, Free to Air (FTA) TV has a significantly larger viewership compared to pay TV. The reach of both Pay TV and FTA TV is consistent across genders. However, Pay TV has a slightly higher reach among individuals aged 18 to 24 years, compared to older age groups.



n=24.3M: Average Daily TV Viewers

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

In urban areas, access to pay TV is greater than in rural areas. Additionally, it is more prevalent among individuals in the LSM 12+ category.



n=24.3M: Average Daily TV Viewers

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

4.3. Exposure to impact of advertising

Overall, a larger audience size along with a higher number of spots indicates greater potential exposure and impact for an advertising campaign. The highest frequency of advertisements is during peak hours, particularly between 18:00 and 22:00, which provides the maximum exposure during this time.

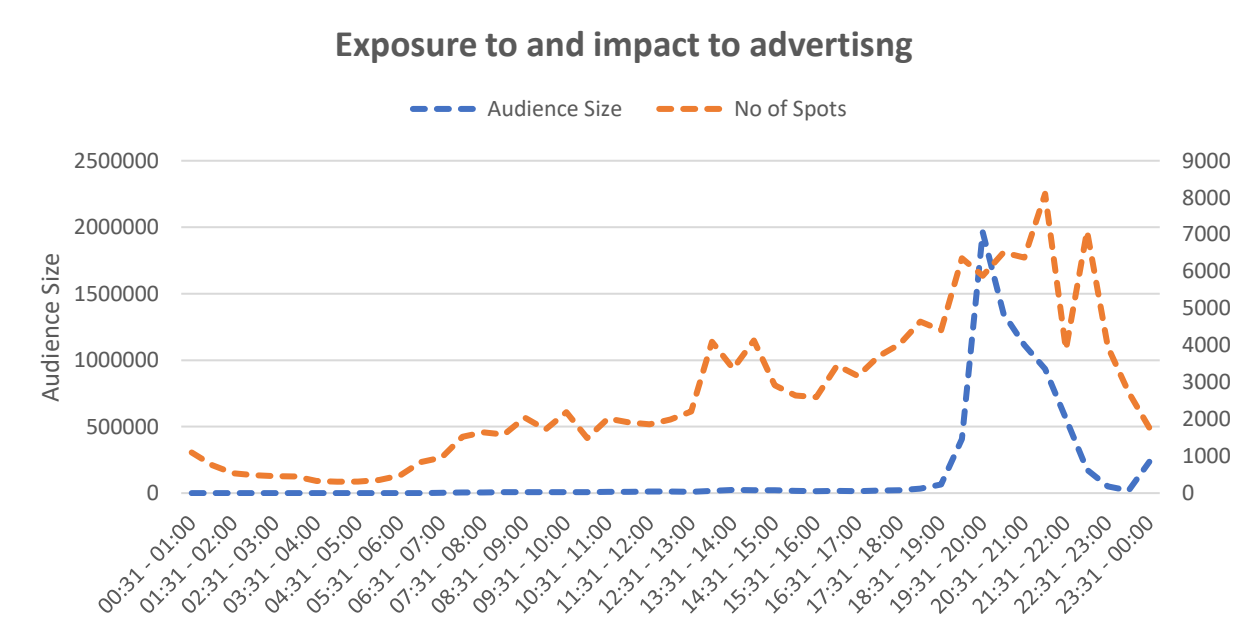
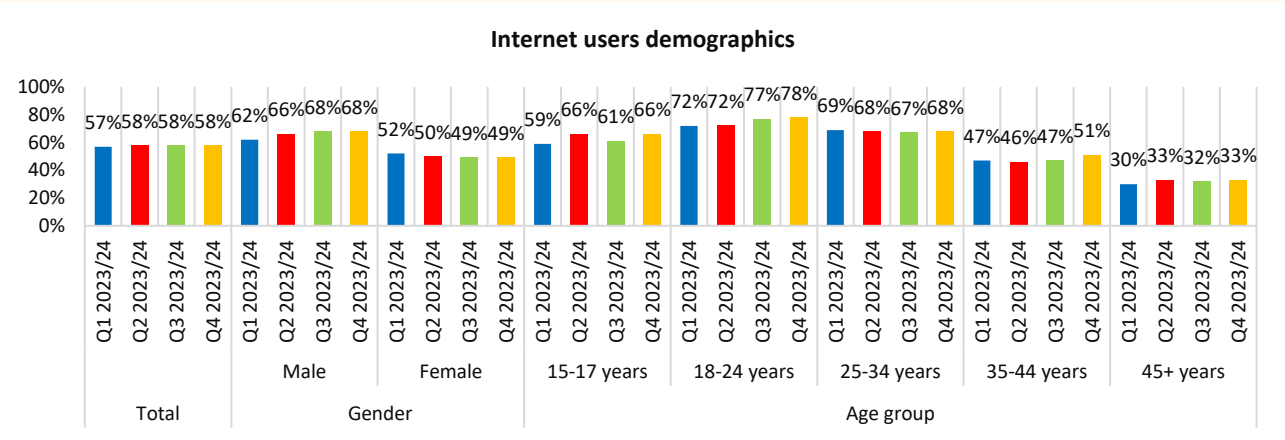


Figure 20: TV exposure to and impact to advertising

5. Internet Usage

5.1. Internet Access by Demographics

Over half of the respondents are internet users, with a higher proportion of males compared to females. Additionally, internet usage is more prevalent among individuals under 34 years old.

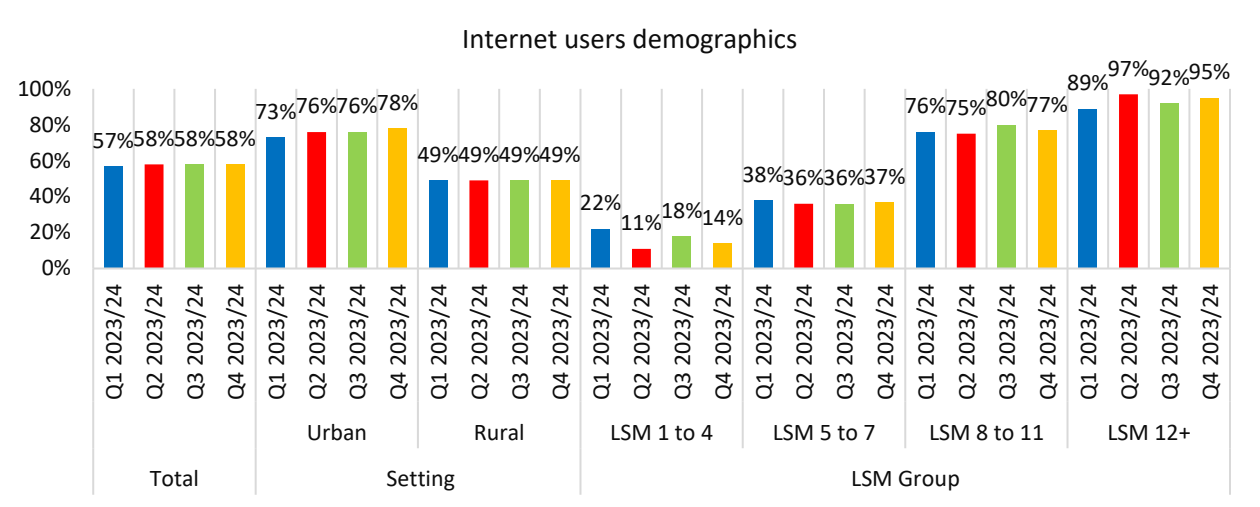


n=19.0M: Average Internet Users

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

The increased prevalence of internet access in Kenyan urban areas can be attributed to well-established infrastructure, featuring a comprehensive network of high-speed broadband and cellular connectivity. Additionally, urban areas have better socioeconomic resources, fostering greater penetration of digital

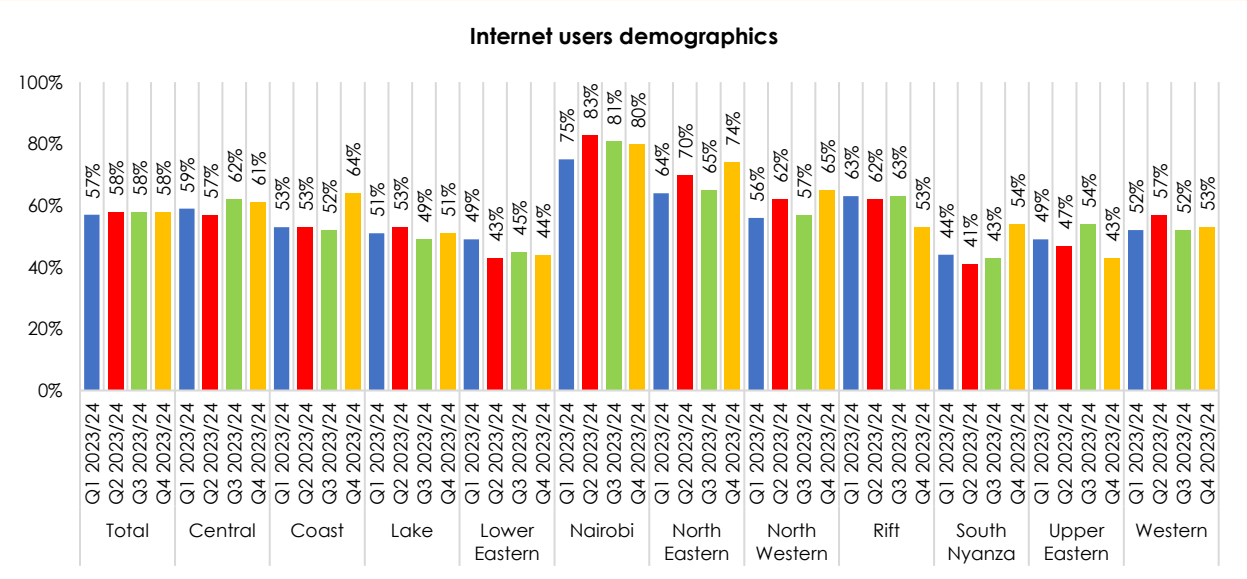
devices and technology adoption compared to rural regions. Higher Living Standards Measure (LSM) scores are associated with increased internet usage.



n=19.0M: Average Internet Users

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

Nairobi ranks highest in internet accessibility, followed by North Eastern, while Lower Eastern has the lowest availability.



n=19.0M: Average Internet Users

Figure 23: Internet users' demographics – total and topography

5.2. Devices Used

The primary mode of internet access is through smartphones, highlighting their crucial role in connecting users and providing access to information. As mobile technology advances, ensuring equitable access to smartphones is essential for promoting digital inclusion and bridging connectivity gaps across different demographics.

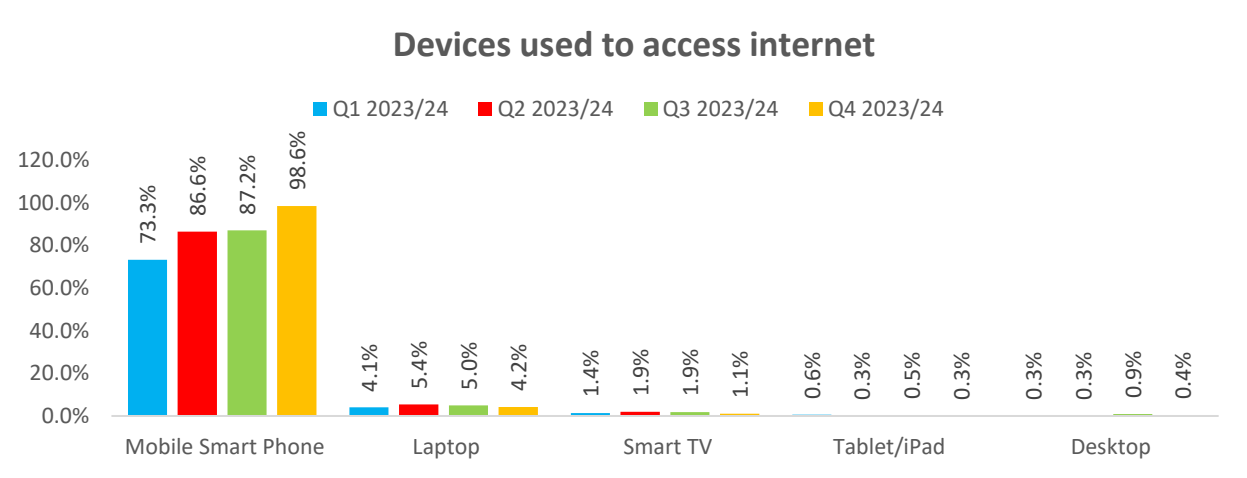


Figure 24:Devices used to access the internet

5.3. Social Media Platforms

Facebook and WhatsApp stand out as the top social media platforms in Kenya. Following closely in popularity, TikTok and YouTube secure the third and fourth positions. The prevalence of Facebook and WhatsApp in social media mentions highlights their extensive adoption and influential presence in the Kenyan digital landscape.

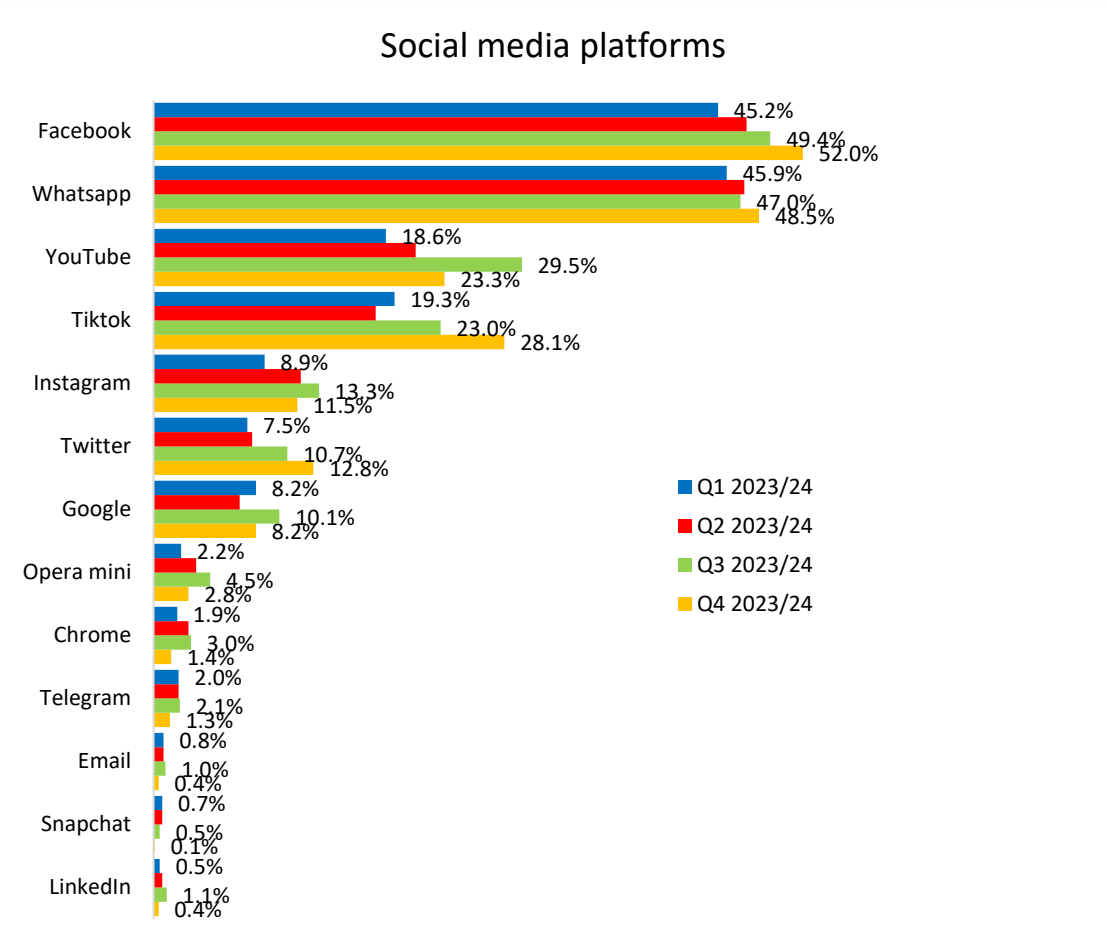
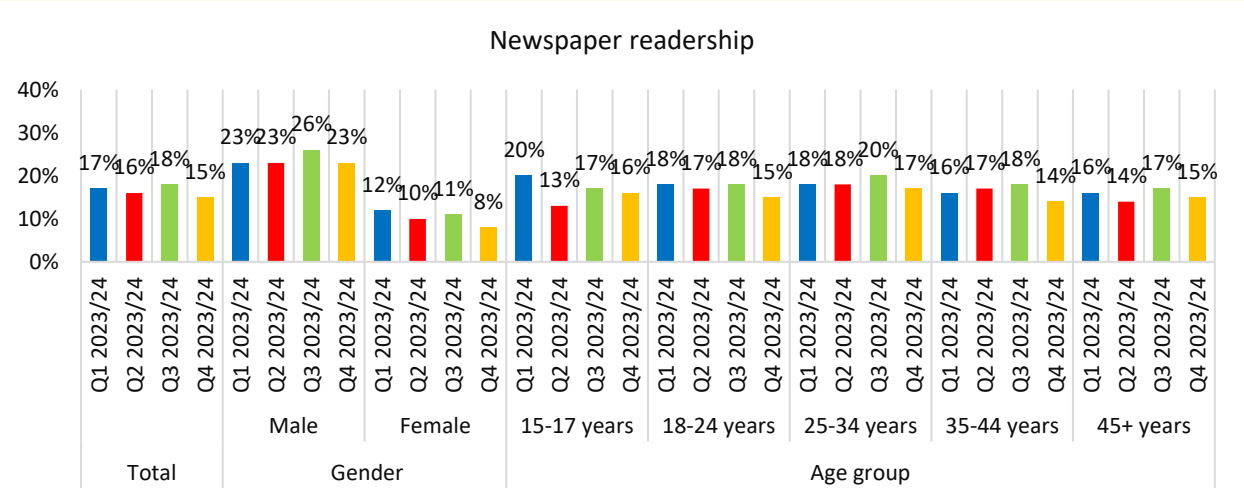


Figure 25: Popular social media platforms

6. Newspaper Readership

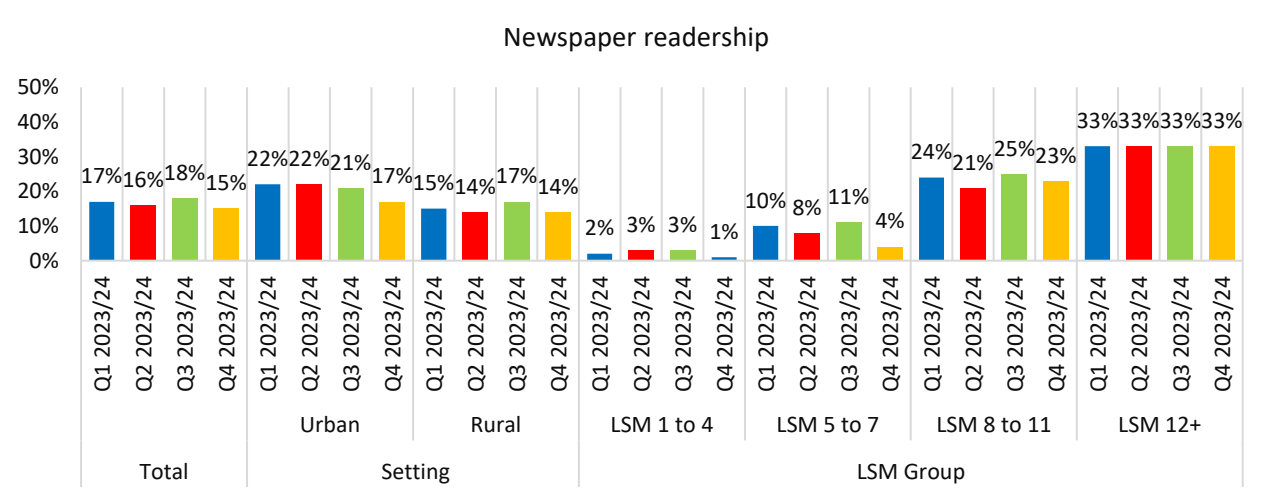
There are more males who read newspapers as compared to females. In terms of age, 25-34 years tend to read newspapers more than other age groups



n=32.2M: All Respondents

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

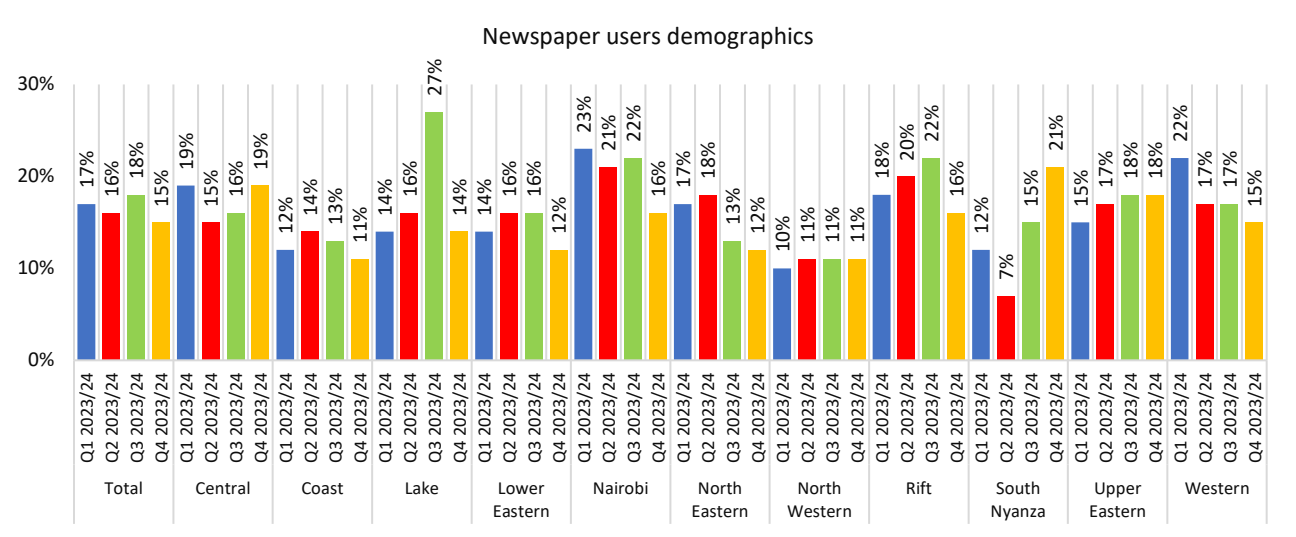
The urban areas and higher LSMs have a higher incidence of readership.



n=32.2M: All Respondents

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

In Q4 2023/24, higher newspaper readership incidences are reported in the South Nyanza and Central topographies. There has been a significant increase in readership in the South Nyanza topographies from 15% to 21%.



n=32.2M: All Respondents

Figure 27: Newspaper readership demographics – by total and topography

7. Advertising Expenditure

7.1. Advertising Expenditure Overview

Overall industry spending increased by 21%. The total spending grew from Kes 16 billion in the Q1 2023/24 to Kes 17 billion in the Q2 2023/24. However, it fell to Kes 15 billion in the Q3 2023/24. By the fourth quarter of 2023/24, spending surged to Kes 18 billion, with the greatest growth seen in the Property, Building, and Accommodation sectors.

Table 4: Advertising Expenditure

Sectors	Q1 2023/24	Q2 2023/24	Q3 2023/24	Q4 2023/24	CHANGE (Q4-Q3)
Financial Services	2,317	2,392	2,285	2,876	26%
Media	2,678	3,331	1,996	2,371	19%
Corporate & Multi-brand	1,403	1,929	1,517	1,873	23%
Betting & Gaming	1,067	1,345	1,403	1,063	-24%
Personal Care	1,064	1,112	1,304	1,479	13%
Communications	1,345	1,006	1,166	1,749	50%
Beverage	407	424	925	1,309	42%
Property & Building & Acc.	1,355	835	831	1,335	61%
Household	788	851	619	797	29%
Foods	894	911	612	855	40%
Publishing & Education	540	419	520	473	-9%
Tourism & Entertainment	343	540	506	421	-17%
Transport	532	545	506	426	-16%
Veterinary & Agriculture	212	365	418	593	42%
Retail	324	391	307	235	-23%
Pharmaceuticals	373	426	259	443	71%
Office Equipment & Supplies	373	388	173	338	95%
Clothing, Fabrics & Footwear	42	31	23	23	0%
Total	**16,059**	**17,242**	**15,370**	**18,659**	**21%**

Key: Figures in KES Millions (000,000)

Specifically, TV has the greatest spending, with radio coming in second. Media have the highest spending in TV while Financial Services on radio. Corporate & Multi-brand have the highest spending in print.

Table 5: Advertising Expenditure for radio, TV & print

Sectors	TV	Radio	Print	Total	Share of Spending (SOS)
Financial Services	1,541	1,114	221	2,876	15%
Media	1,619	322	430	2,371	13%
Corporate & Multibrand	831	356	686	1,873	10%
Communications	1,145	585	19	1,749	9%
Personal care	1,277	201	1	1,479	8%
Property & Building & Acc.	1,043	243	48	1,335	7%
Beverage	857	442	10	1,309	7%
Betting & Gaming	794	229	40	1,063	6%

Foods	709	144	2	855	5%
Household	566	221	10	797	4%
Veterinary & Agriculture	80	506	7	593	3%
Publishing & Education	316	101	56	473	3%
Pharmaceuticals	331	105	7	443	2%
Transport	207	180	40	426	2%
Tourism & entertainment	208	206	7	421	2%
Office Equipment & Supplies	273	64	1	338	2%
Retail	164	54	17	235	1%
Clothing, Fabrics & Footwear	19	2	3	23	0%
Grand Total	11,980	5,073	1,605	18,659	100%

Key: Figures in KES Millions (000,000)

7.2. Year to Date Advertising Trends

While electronic media showed positive trends, media purchasing witnessed an -12% drop by the end of the fourth quarter.

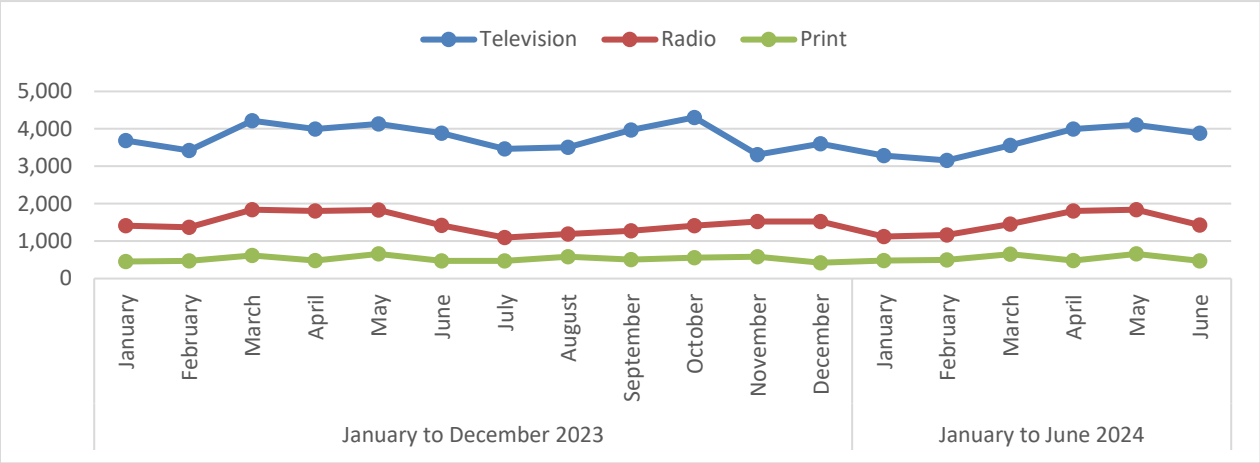


Figure 28: Advertising spends Jan 2023 to March 2024
Key: Figures in KES Millions (000,000)

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

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

Figure 29: Advertising spends pay TV and free to air TV
Key: Figures in KES Millions (000,000)

7.4. TV Spends by Sector/Industry

Despite tough economic times, FMCG and service brands remain strong, as government reduced their media buying.

Table 6: TV spends by sector/industry

Sector/ Industry	Q1 2023/24	Q2 2023/24	Q3 2023/24	Q4 2023/24
Media	1,924	2,543	1226	1619
Financial Services	1,335	1,337	1298	1541
Personal Care	1,023	922	1209	1277
Communications	826	640	858	1145
Property & Building & Acc.	1,161	724	746	1043
Beverage	195	217	713	857
Corporate & Multibrand	520	825	479	831
Betting & Gaming	689	892	758	794
Foods	727	684	446	709
Household	608	663	520	566
Pharmaceuticals	267	291	176	331
Publishing & Education	394	269	317	316
Office Equipment & Supplies	303	309	140	273
Tourism & Entertainment	340	347	402	208
Transport	278	234	357	207
Retail	277	245	186	164
Veterinary & Agriculture	33	61	149	80
Clothing, Fabrics & Footwear	36	18	17	19

Key: Figures in KES Millions (000,000)

7.5. Radio Spends by Sector/Industry

Financial services have the highest advertising spend on radio.

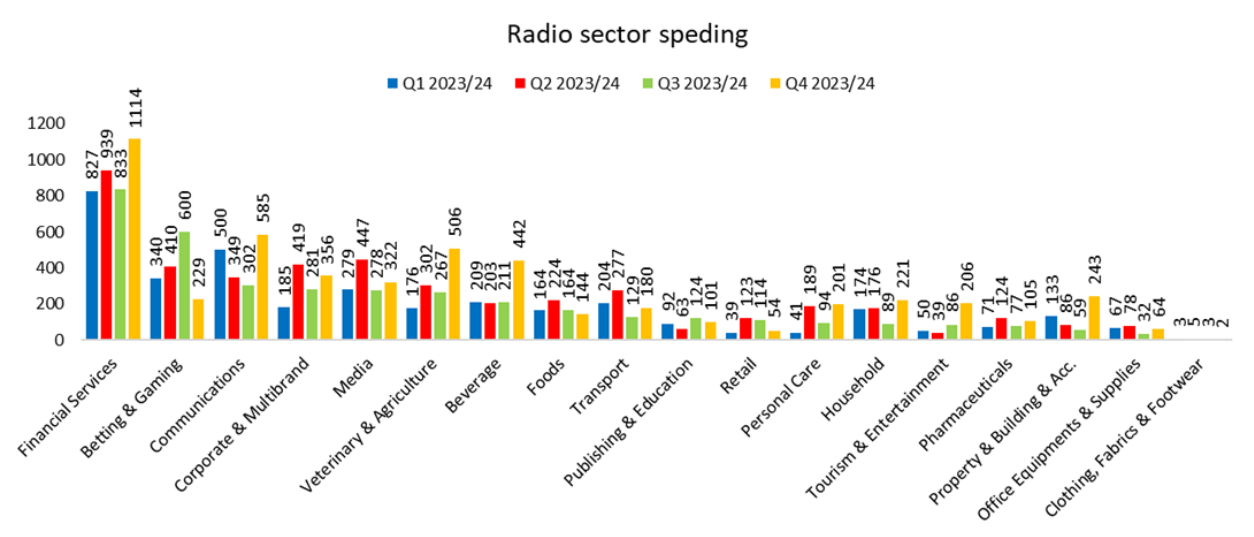


Figure 30: Advertising spend by sector for radio
Key: Figures in KES Millions (000,000)

7.6. Print Spends by Sector/Industry

The highest spends distribution is on corporate & multi-brand and media in Q1 to Q3. A notable decrease in Q4.

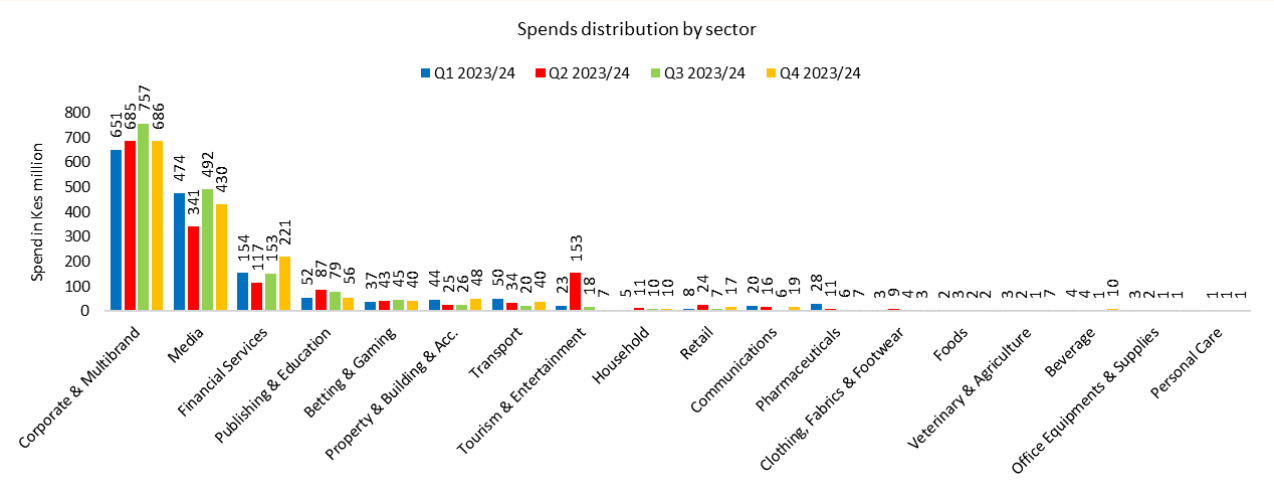


Figure 31: Spend distribution by sector on print
Key: Figures in KES Millions (000,000)

8. CHALLENGES AND OPPORTUNITIES FOR THE BROADCASTING INDUSTRY IN KENYA

Challenges in the Broadcasting Industry in Kenya

- **Internet Penetration:** Rural areas have recorded a low internet penetration rates across all quarters ***(refer to figure 22).*** These areas still face challenges in accessing broadcasting services due to lack of electricity and and access to the Internet connectivity. Additionally, the high cost of Internet bundles relative to average income results in lower Internet access rates, with those in lower LSM having only 14% internet access in Q4 2023/24.

- **Multiple media platform consumption:** Competition in the media landscape has intensified, as demonstrated by the surge in the proportion of individuals interacting with multiple media platforms, which rose from 32% to 42% during the fourth quarter of 2023/24. This notable increase indicates a significant shift in consumer behavior towards diversifying their media consumption habits. Factors such as the abundance of media options and the demand for diverse content experiences are likely to drive this trend. Consequently, media companies must reassess their strategies to remain competitive and capture audience attention across a spectrum of platforms.

Opportunities in the Broadcasting Industry in Kenya

- **Language of Broadcasting:** Broadcasting in Kiswahili or local languages has helped reach many people across the country. Most radio stations use Kiswahili (59%) or local languages (39%), reaching many listeners. This is a great chance for content creators to reach more people and explore new markets. The popularity of Kiswahili and local language radio stations shows they connect people across different languages and cultures in the country.

- **Social media as mode of communication:** The widespread use and popularity of digital platforms like Facebook, WhatsApp, X (twitter), YouTube, and TikTok in Kenya present a significant opportunity for the broadcasting industry. By leveraging these platforms, broadcasters can interact with viewers instantly, reaching a larger audience more effectively. Additionally, the use of social media for one-on-one and group communications has reduced costs associated with calling airtime and travel, making it more efficient to conduct virtual meetings and broadcast events, ultimately enhancing audience engagement and expanding reach.