



# **AUDIENCE MEASUREMENT AND INDUSTRY TRENDS REPORT**

**October 2024**



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## 1. INTRODUCTION

Kenya's media landscape is celebrated for its diversity and advancement, with a thriving radio sector of over 250 stations catering to multiple local or vernacular languages and an expanded television sector thanks to the 2015 shift to digital terrestrial broadcasting. High mobile phone usage has driven one of Africa's leading internet penetration rates, allowing Kenyans to access a variety of digital platforms. However, this competitive and ever-evolving environment presents challenges in capturing and retaining a broad audience amidst fierce competition and changing consumer preferences.

In this dynamic landscape, research plays an essential role, enabling media organizations, policymakers, and stakeholders to understand audience preferences, emerging trends, and the impact of different platforms. Research uncovers market gaps, reveals opportunities, and informs content strategies to maximize audience engagement. Additionally, as digital transformation reshapes content consumption, research helps media organizations adapt to new channels and technological advances, ensuring they stay relevant and agile. This makes investing in research a strategic priority for sustaining growth and resilience in Kenya's increasingly digital media industry.

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## 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.

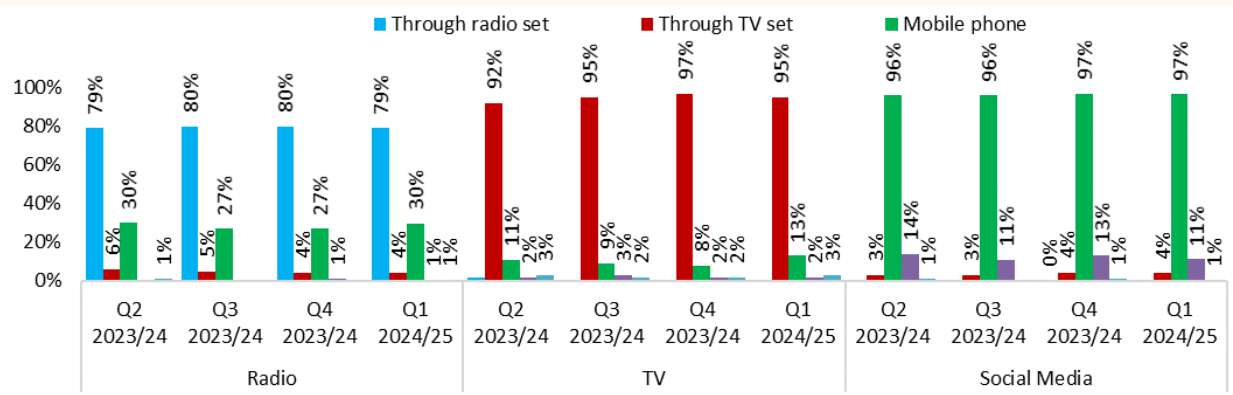


Figure 1: Ways in which media is consumed by total

### 2.2. Place of Media Consumption

From Q2 2023/24 to Q1 2024/25, there hasn't been any significant change in where media is consumed. The home remains the primary setting for engaging with media, with radio slightly edging out television in this environment. Moreover, media consumption at the workplace favors radio. In social settings like bars, restaurants, and hotels, television content is more popular.

Place of Media Consumption	Total				Radio				TV			
	Q2 2023/24	Q3 2023/24	Q4 2023/24	Q1 2024/25	Q2 2023/24	Q3 2023/24	Q4 2023/24	Q1 2024/25	Q2 2023/24	Q3 2023/24	Q4 2023/24	Q1 2024/25
At own home	88%	89%	89%	90%	85%	86%	85%	87%	86%	87%	87%	86%
Place of work	4%	3%	3%	3%	5%	4%	5%	4%	4%	5%	4%	4%
Bar/Restaurant/Hotel	3%	3%	2%	2%	1%	2%	2%	2%	7%	6%	6%	6%
Someone else's household	3%	3%	2%	2%	1%	1%	2%	2%	3%	2%	3%	3%
Bus/Taxi/Matatu	1%	1%	1%	1%	2%	2%	2%	2%	0%	0%	0%	0%
In car - Private	1%	1%	1%	1%	5%	4%	3%	2%	0%	0%	0%	0%
On the move	0%	0%	1%	1%	1%	1%	1%	1%	0%	0%	0%	0%

Figure 2: Place of media consumption by total

### 2.3. Access and usage of traditional media & digital media

This shows that while digital media use, especially the internet, stayed the same, radio listening went down a bit. On the other hand, there was a small comeback for print media, with more people reading magazines and newspapers in the most recent quarter.

### Access and Usage in the last 7 days

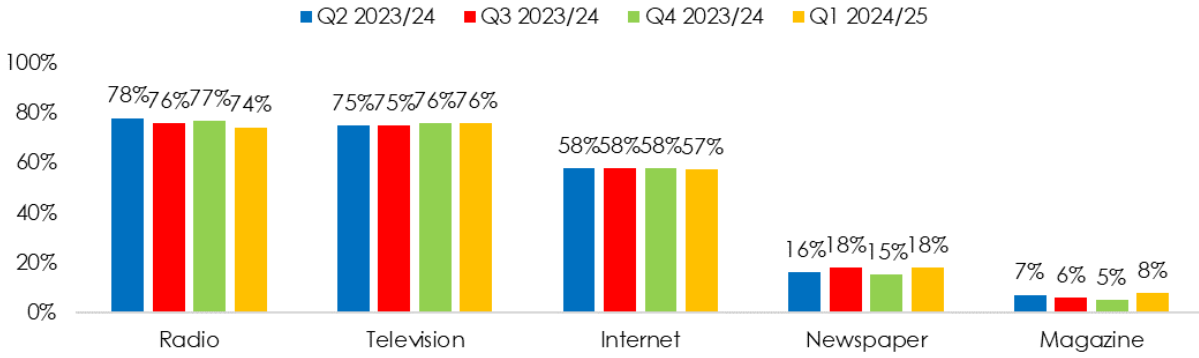
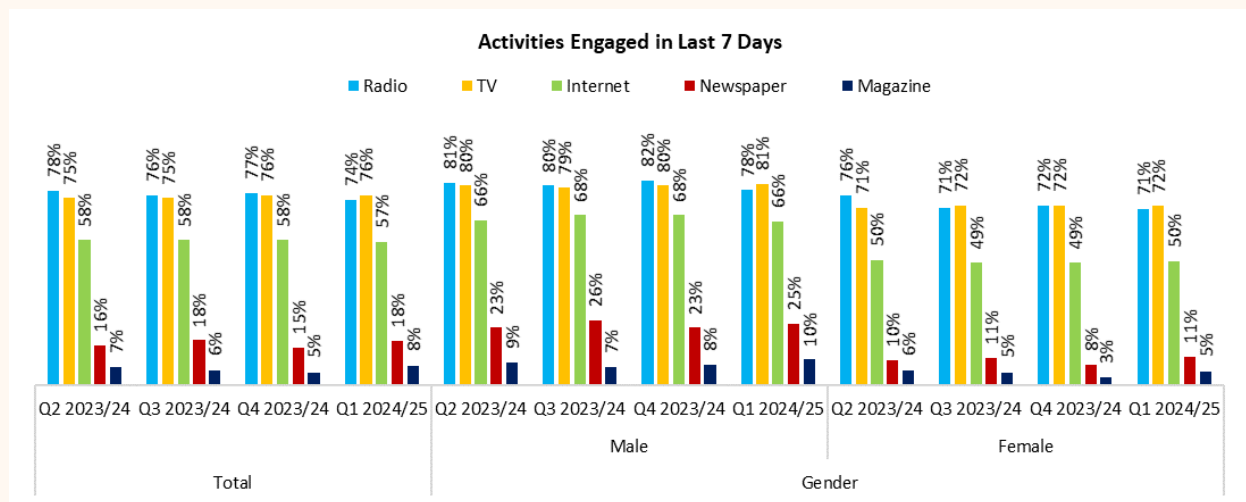


Figure 3: Access and Usage of media by total

The findings indicate a gender gap in media consumption, with male respondents consuming more TV, radio, online newspapers, and magazines than female respondents.



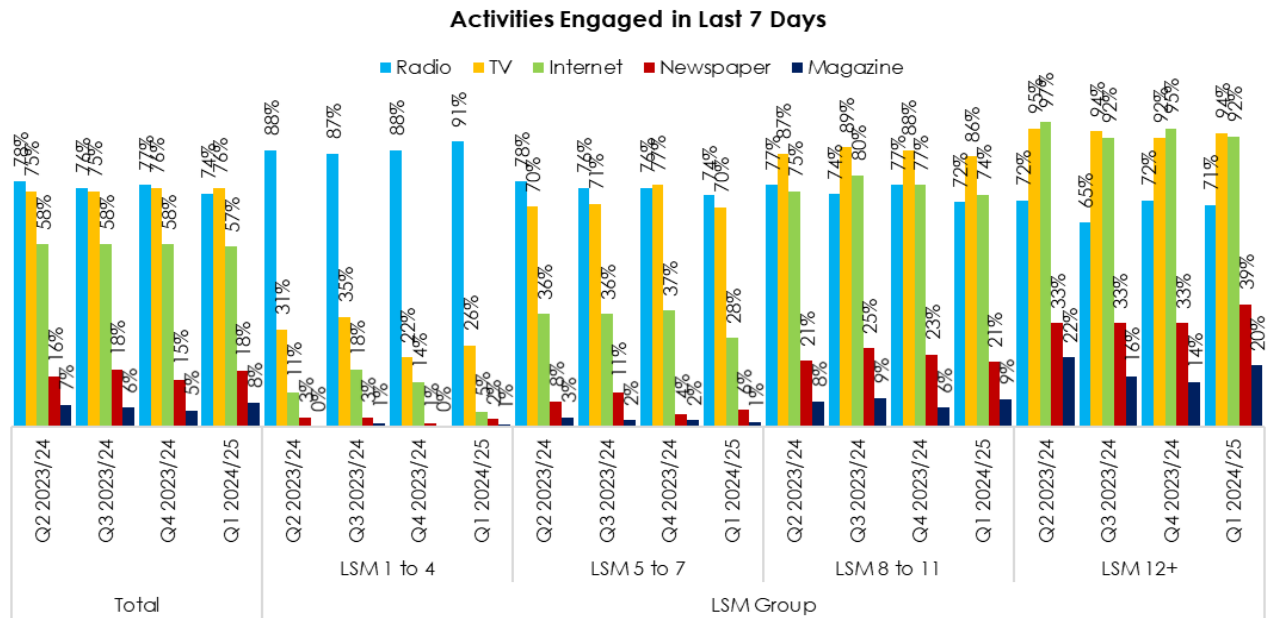


Figure 5: Activities Engaged in Last 7 Days - by total & LSM

The regions with the largest radio listenership include the South Nyanza (88%), Lower Eastern (85%), Western (83%), and Upper Eastern (80%). While internet usage is most prevalent in Nairobi, with 80% of people using it, Central and Nairobi regions show noticeably high television consumption (85%). There are geographical differences in newspaper reading, with Lake regions showing notable increase of 8%.

	FY	Radio	TV	Internet	Newspaper	Magazine
Total	Q2 2023/24	78%	75%	58%	16%	7%
	Q3 2023/34	76%	75%	58%	18%	6%
	Q4 2023/24	77%	76%	58%	15%	5%
	Q1 2024/25	74%	76%	57%	18%	8%
Central	Q2 2023/24	80%	87%	57%	15%	6%
	Q3 2023/34	76%	82%	62%	16%	4%
	Q4 2023/24	76%	86%	61%	19%	7%
	Q1 2024/25	75%	85%	54%	18%	8%
Coast	Q2 2023/24	73%	73%	53%	14%	8%
	Q3 2023/34	62%	72%	52%	13%	5%
	Q4 2023/24	68%	67%	64%	11%	3%
	Q1 2024/25	66%	72%	56%	18%	9%
Lake	Q2 2023/24	83%	72%	53%	16%	11%
	Q3 2023/34	83%	75%	49%	27%	7%
	Q4 2023/24	85%	82%	51%	14%	3%
	Q1 2024/25	76%	75%	58%	22%	10%

Lower Eastern	Q2 2023/24	85%	80%	43%	16%	5%
	Q3 2023/34	83%	73%	45%	16%	6%
	Q4 2023/24	80%	65%	44%	12%	6%
	Q1 2024/25	85%	70%	51%	13%	8%
Nairobi	Q2 2023/24	69%	81%	83%	21%	8%
	Q3 2023/34	65%	81%	81%	22%	8%
	Q4 2023/24	64%	84%	80%	16%	7%
	Q1 2024/25	65%	85%	79%	20%	6%
North Eastern	Q2 2023/24	62%	46%	70%	18%	2%
	Q3 2023/34	56%	51%	65%	13%	4%
	Q4 2023/24	58%	52%	74%	12%	7%
	Q1 2024/25	46%	67%	81%	14%	9%
North Western	Q2 2023/24	74%	70%	62%	11%	3%
	Q3 2023/34	74%	69%	57%	11%	1%
	Q4 2023/24	72%	73%	65%	11%	1%
	Q1 2024/25	54%	75%	57%	14%	3%
Rift	Q2 2023/24	82%	71%	62%	20%	11%
	Q3 2023/34	82%	80%	63%	22%	10%
	Q4 2023/24	84%	71%	53%	16%	4%
	Q1 2024/25	79%	80%	57%	22%	10%
South Nyanza	Q2 2023/24	78%	57%	41%	7%	5%
	Q3 2023/34	76%	70%	43%	15%	8%
	Q4 2023/24	86%	72%	54%	21%	10%
	Q1 2024/25	88%	60%	50%	14%	8%
Upper Eastern	Q2 2023/24	71%	71%	47%	17%	9%
	Q3 2023/34	79%	79%	54%	18%	7%
	Q4 2023/24	86%	83%	43%	18%	7%
	Q1 2024/25	80%	77%	55%	14%	8%
Western	Q2 2023/24	85%	74%	57%	17%	6%
	Q3 2023/34	82%	71%	52%	17%	7%
	Q4 2023/24	85%	74%	53%	15%	2%
	Q1 2024/25	83%	67%	48%	18%	5%



## 2.4. Number of Media Consumed

The data trend shows that during Q1 2024/2025, there was a minor increase in the consumption of two media. The percentage of participants utilizing various media platforms increased by 2.5% in Q1 2024/25. There was a slight decrease in multimedia consumption during Q1 2024/25 suggests a break in the trend towards a more interconnected media landscape. With a 2.3% decrease in respondents engaging with multiple media platforms.

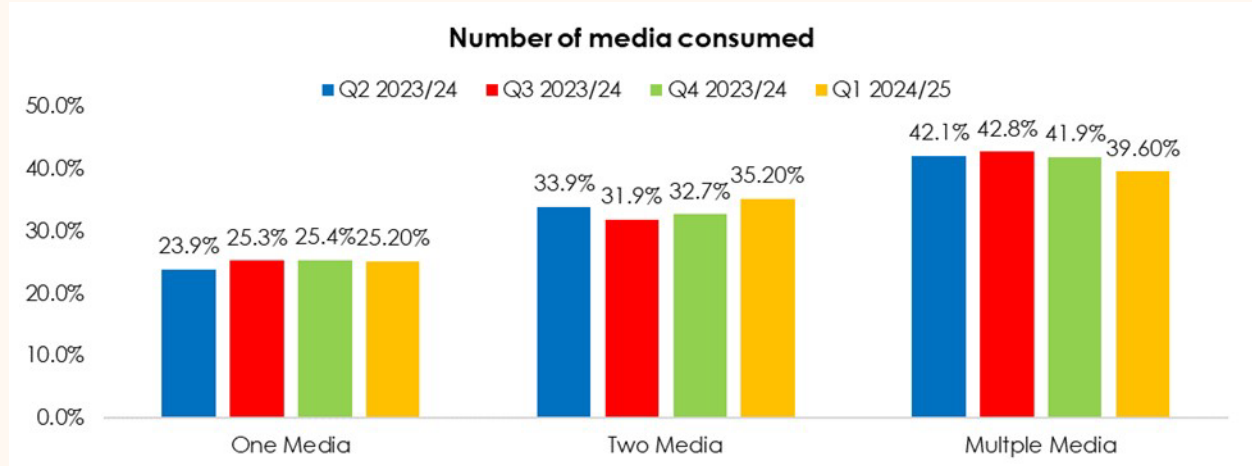
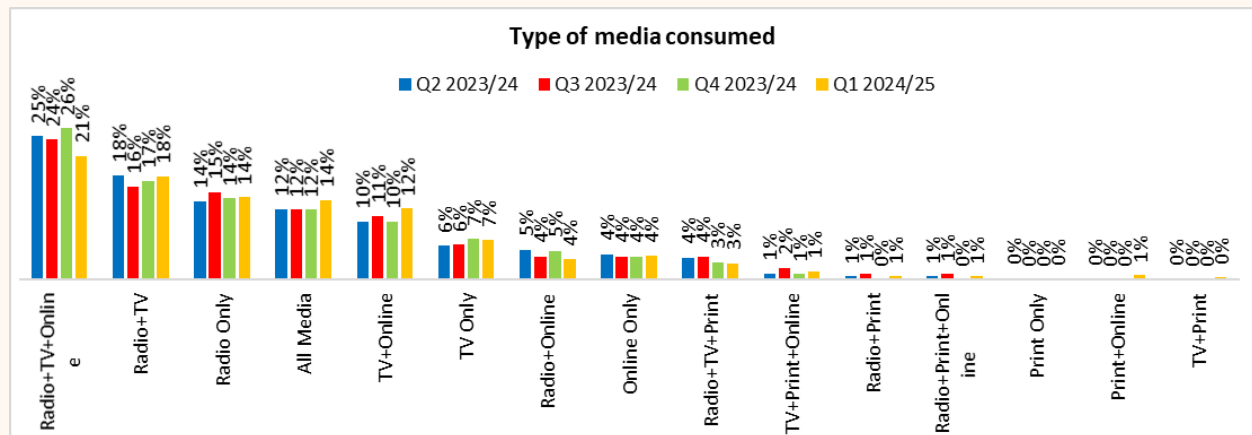


Figure 6: Number of media consumed by total



## 2.6. Frequency of Media Consumption

The media consumption patterns observed in Q4 2023/24 daily engagement for TV and radio (54%), with a decrease to 52% in Q1 2024/25 for TV. From Q4 2023/24 to Q1 2024/25, there was a decrease in radio consumption from 51% to 49% and daily participation on social media, from 45% to 42%.

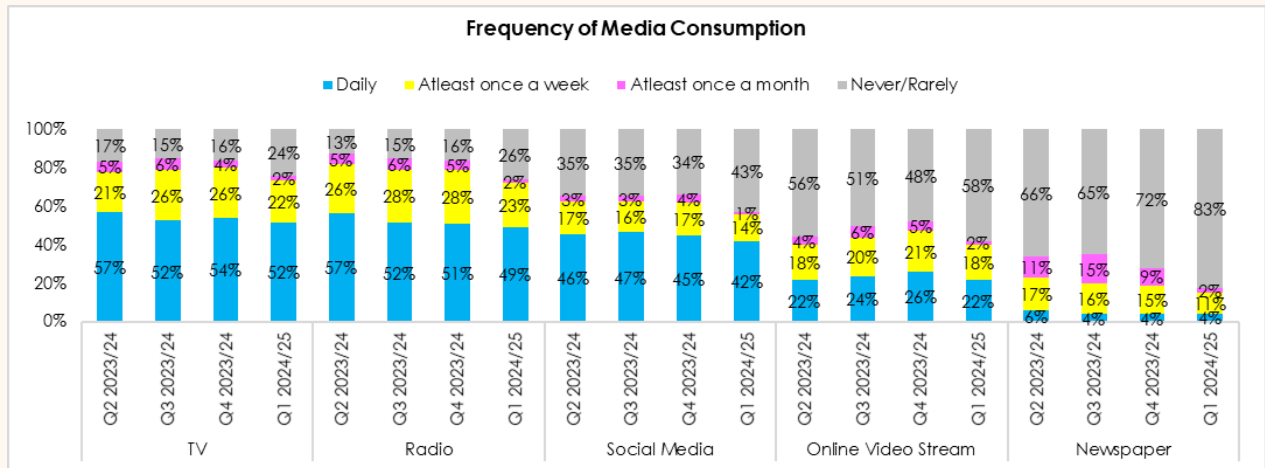


Figure 8: Frequency of consuming Tv, radio, social media, online streams and newspapers

## 2.7. Demographics of Media Consumers

Demographics		Financial Year	Radio Listeners, n=24.3M	TV Viewers, n=24.9M	Newspaper Readership, n=5.8M	Online Usage, n=18.8M
Gender	Male	Q2 2023/24	51%	52%	69%	56%
		Q3 2023/24	52%	52%	70%	57%
		Q4 2023/24	52%	52%	74%	58%
		Q1 2024/25	52%	52%	68%	56%
	Female	Q2 2023/24	49%	48%	31%	44%
		Q3 2023/24	48%	48%	30%	43%
		Q4 2023/24	48%	48%	26%	42%
		Q1 2024/25	48%	48%	33%	44%
Age group	15-17 years	Q2 2023/24	11%	10%	10%	14%
		Q3 2023/24	12%	12%	12%	13%
		Q4 2023/24	12%	10%	12%	13%
		Q1 2024/25	11%	11%	12%	14%
	18-24 years	Q2 2023/24	22%	24%	24%	29%

		Q3 2023/24	21%	24%	23%	31%
		Q4 2023/24	20%	23%	21%	29%
		Q1 2024/25	20%	24%	19%	27%
	25-34 years	Q2 2023/24	26%	28%	30%	31%
		Q3 2023/24	26%	27%	28%	30%
		Q4 2023/24	24%	25%	26%	28%
		Q1 2024/25	23%	26%	30%	31%
	35-44 years	Q2 2023/24	21%	19%	20%	15%
		Q3 2023/24	20%	19%	19%	15%
		Q4 2023/24	17%	18%	16%	15%
		Q1 2024/25	19%	17%	19%	16%
	45+ years	Q2 2023/24	20%	19%	17%	11%
		Q3 2023/24	20%	18%	18%	10%
Q4 2023/24		27%	24%	24%	14%	
Q1 2024/25		28%	23%	20%	12%	
Setting	Urban	Q2 2023/24	30%	36%	44%	43%
		Q3 2023/24	29%	36%	38%	43%
		Q4 2023/24	28%	34%	37%	44%
		Q1 2024/25	28%	35%	40%	41%
	Rural	Q2 2023/24	70%	64%	57%	57%
		Q3 2023/24	71%	64%	62%	57%
		Q4 2023/24	72%	66%	63%	56%
		Q1 2024/25	72%	65%	60%	59%
LSM Group	LSM 1 to 4	Q2 2023/24	16%	6%	3%	3%
		Q3 2023/24	19%	8%	3%	5%
		Q4 2023/24	15%	4%	1%	3%
		Q1 2024/25	15%	4%	2%	1%
	LSM 5 to 7	Q2 2023/24	30%	28%	14%	19%
		Q3 2023/24	30%	28%	19%	19%
		Q4 2023/24	31%	32%	9%	20%
		Q1 2024/25	25%	23%	8%	12%
	LSM 8 to 11	Q2 2023/24	41%	48%	54%	54%
		Q3 2023/24	41%	50%	57%	58%
		Q4 2023/24	40%	46%	59%	52%
		Q1 2024/25	45%	53%	54%	60%
	LSM 12+	Q2 2023/24	13%	18%	29%	24%
		Q3 2023/24	10%	15%	21%	18%
		Q4 2023/24	14%	18%	31%	24%
		Q1 2024/25	16%	21%	37%	27%

### 3. Radio Listenership Section

#### 3.1. Radio Listeners' Key Demographics

Among demographic groups, males generally show a stronger preference for radio consumption compared to females, with this trend being especially pronounced among older individuals. Additionally, radio listenership consistently increases with age.

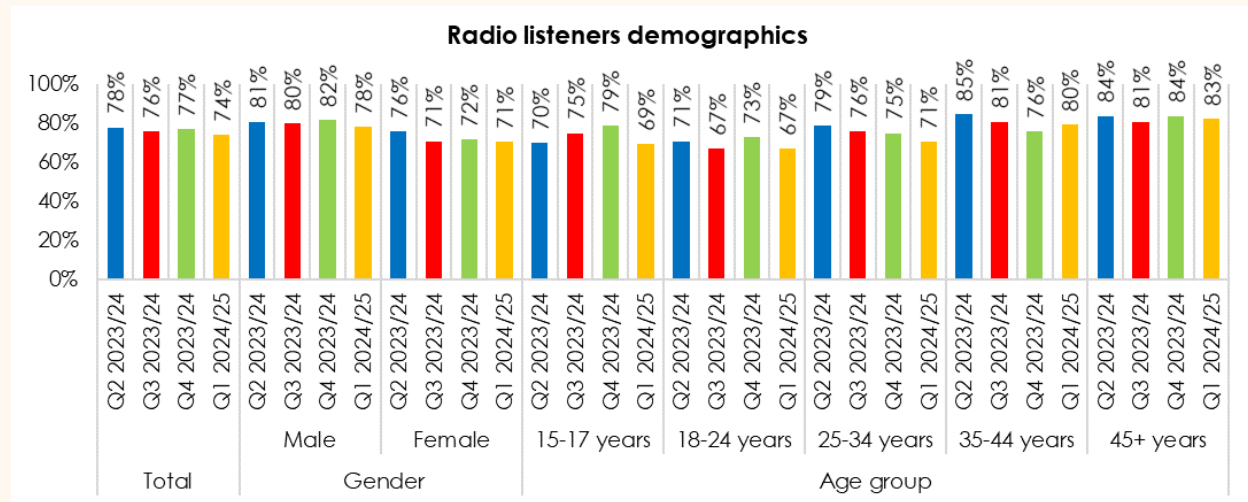
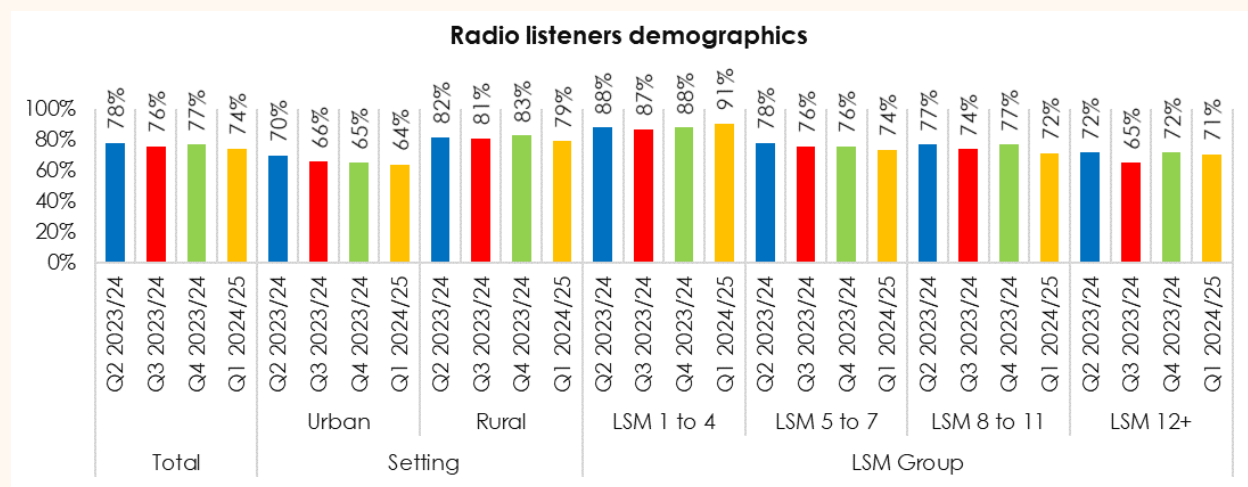


Figure 9: Demographics of radio consumers– by total, gender



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

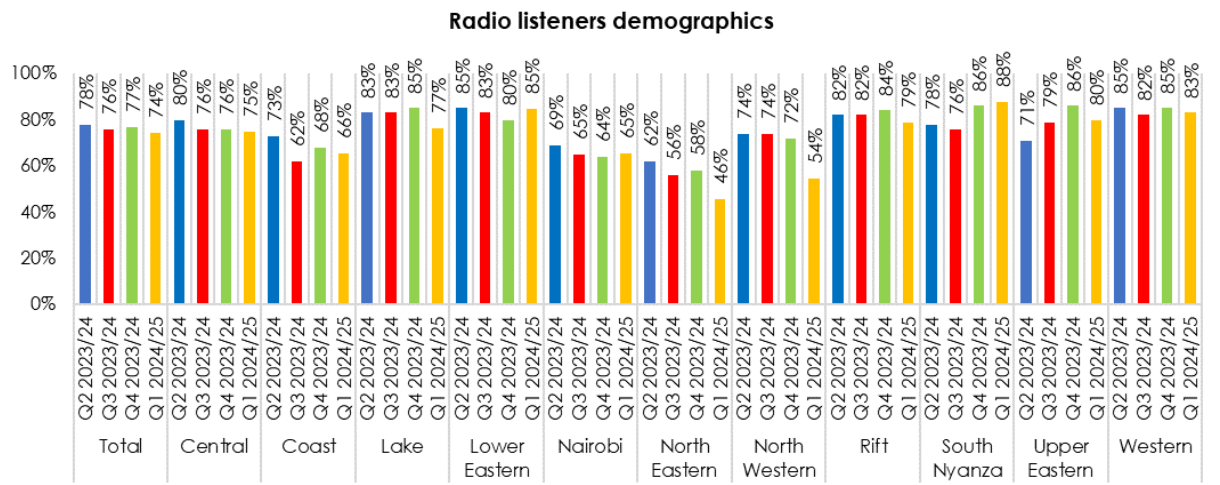
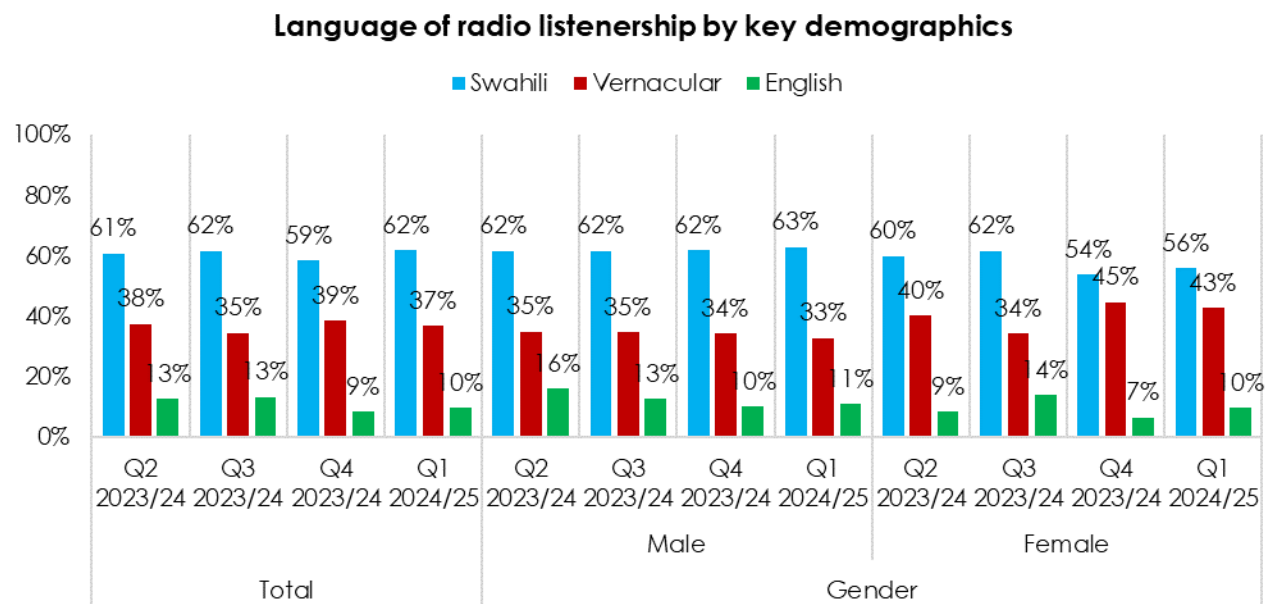


Figure 11: Demographics of radio consumers– by total, Topography

### 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.



Even though Swahili stations are the most tuned-in stations, there is higher usage of English stations in Urban areas compared to rural areas. This was observed only from Q3 2023/24 to Q1 2024/25.

### Language of radio listenership by key demographics

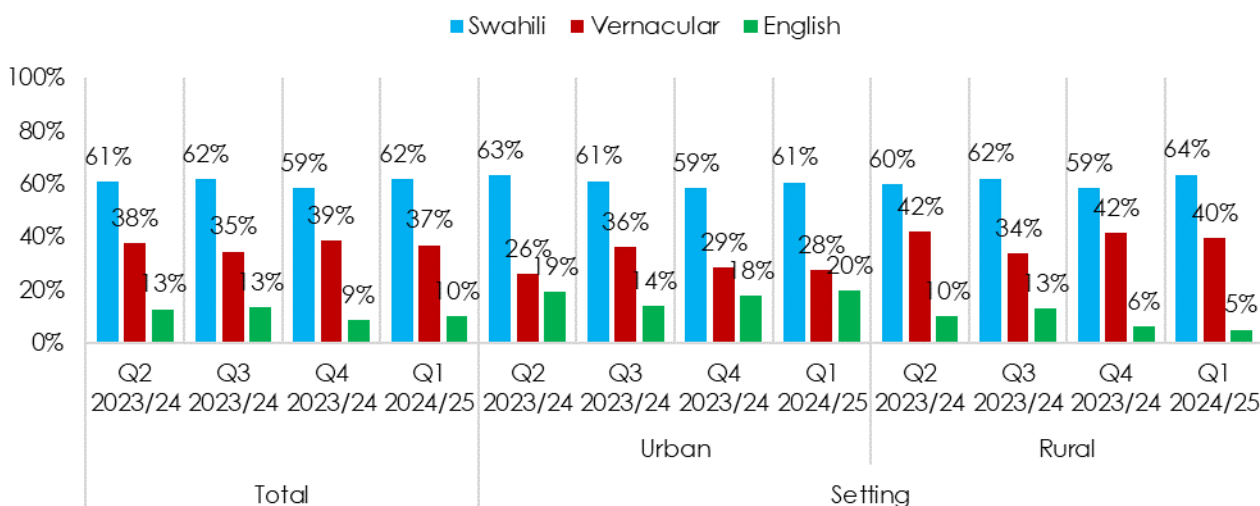
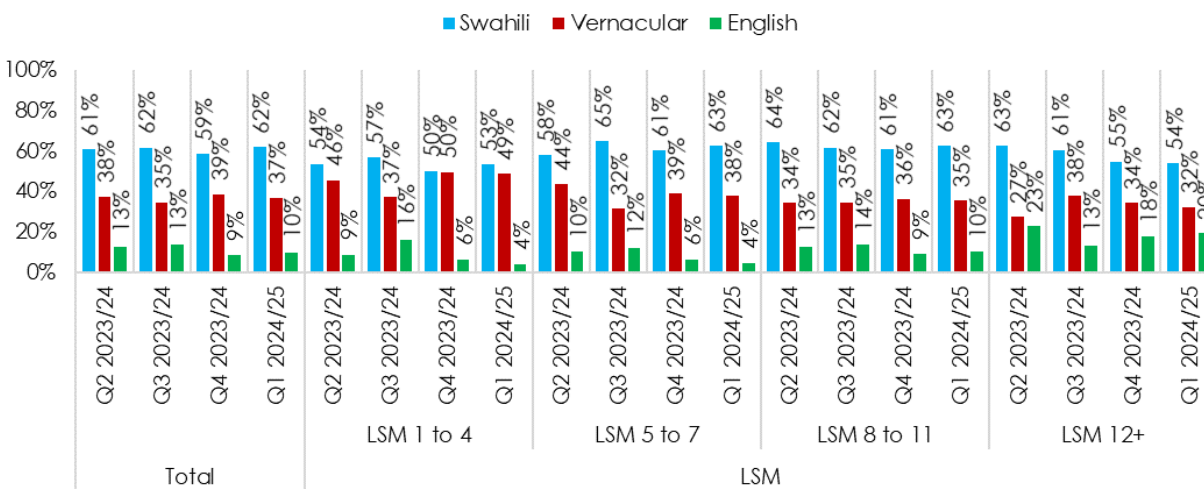


Figure 13: Radio listenership language by total & setting

Kiswahili and vernacular are more commonly spoken by lower populations especially those in LSM 5 to 11. This might be due to its more frequent use in everyday conversations.

### Language of radio listenership by key demographics



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

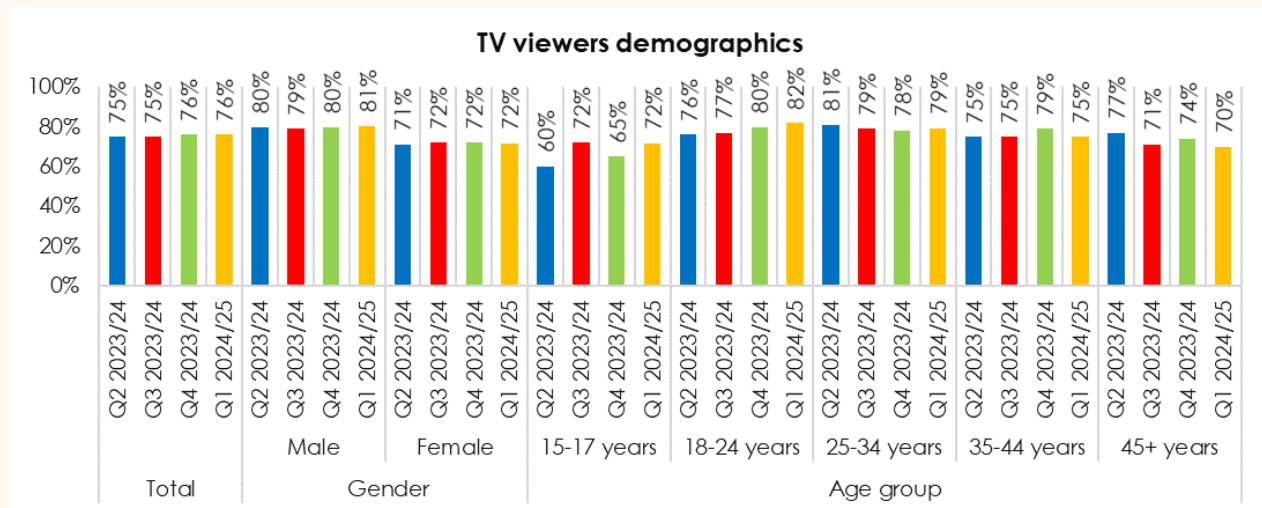
Total/ Topography		Financial	Radio listenership language		
		Year	Swahili	Vernacular	English
Total		Q2 2023/24	61%	38%	13%
		Q3 2023/24	62%	35%	13%
		Q4 2023/24	59%	39%	9%
		Q1 2024/25	59%	39%	9%
Topography	Central	Q2 2023/24	45%	50%	13%
		Q3 2023/24	62%	36%	12%
		Q4 2023/24	42%	54%	10%
		Q1 2024/25	43%	52%	11%
	Coast	Q2 2023/24	77%	20%	10%
		Q3 2023/24	62%	32%	16%
		Q4 2023/24	59%	32%	14%
		Q1 2024/25	61%	31%	15%
	Lake	Q2 2023/24	58%	49%	8%
		Q3 2023/24	60%	38%	13%
		Q4 2023/24	46%	60%	4%
		Q1 2024/25	47%	58%	4%
	Lower Eastern	Q2 2023/24	50%	53%	8%
		Q3 2023/24	58%	35%	15%
		Q4 2023/24	33%	66%	6%
		Q1 2024/25	34%	64%	6%
	Nairobi	Q2 2023/24	61%	21%	30%
		Q3 2023/24	64%	34%	14%
		Q4 2023/24	66%	15%	24%
		Q1 2024/25	68%	15%	25%
	North Eastern	Q2 2023/24	60%	21%	24%
		Q3 2023/24	61%	33%	13%
		Q4 2023/24	51%	27%	27%
		Q1 2024/25	53%	26%	28%
	North Western	Q2 2023/24	64%	22%	23%
		Q3 2023/24	67%	25%	19%
		Q4 2023/24	66%	33%	10%
		Q1 2024/25	68%	32%	11%
Rift	Q2 2023/24	67%	34%	16%	

		Q3 2023/24	67%	30%	12%
		Q4 2023/24	68%	29%	8%
		Q1 2024/25	70%	28%	8%
	South Nyanza	Q2 2023/24	58%	42%	10%
		Q3 2023/24	59%	46%	15%
		Q4 2023/24	79%	23%	5%
	Upper Eastern	Q1 2024/25	81%	22%	5%
		Q2 2023/24	53%	44%	12%
		Q3 2023/24	53%	39%	13%
	Western	Q4 2023/24	46%	51%	9%
		Q1 2024/25	47%	49%	9%
		Q2 2023/24	80%	24%	6%
Q3 2023/24		61%	35%	12%	
	Q4 2023/24	88%	15%	2%	
	Q1 2024/25	91%	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 35 to 45+ year-olds, indicates TV networks and streaming services are producing less content targeted specifically at older people, ignoring their interests and concerns.

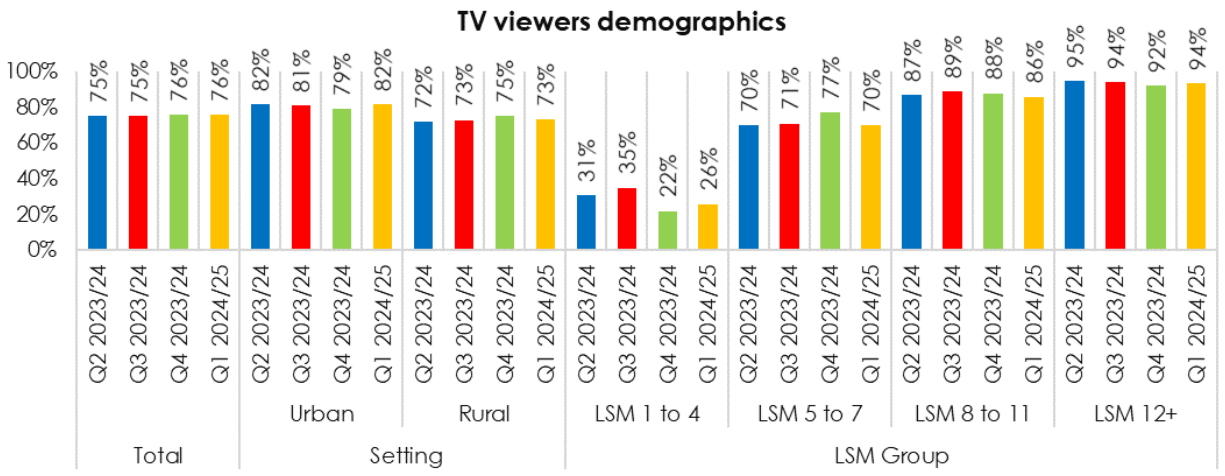


N=32.23M: All Respondents

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



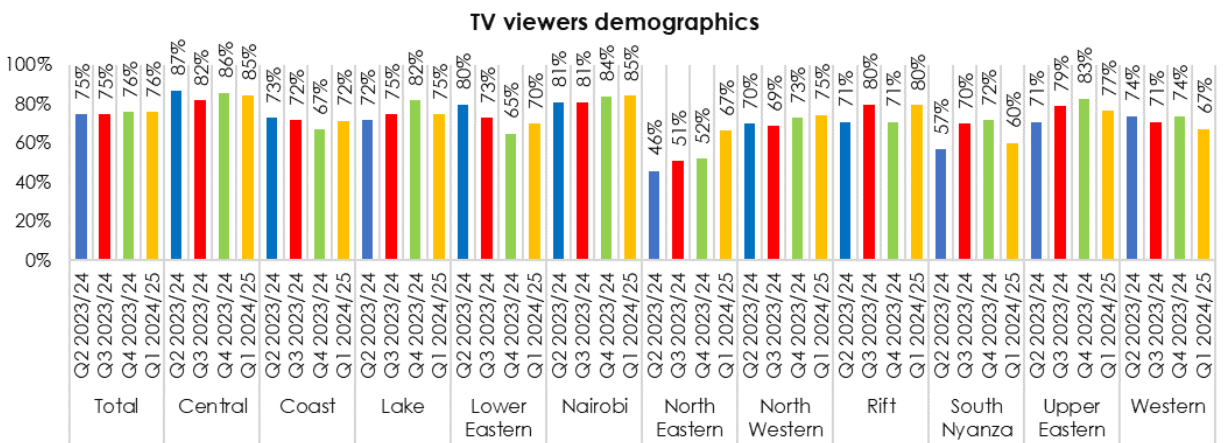
Viewership numbers increase in the lower LSM 1 to 4 segments and also a major decline in the lower LSM 5 to 7 segment, with a decrease of 7%. Conversely, viewership increases in the lower LSM 1 to 4 segment. These variations underscore the influence of socioeconomic factors, such as limited availability of television sets. This highlights the need for tailored strategies to address diverse demographic and socioeconomic factors in order to enhance TV viewership.



N=32.23M: All Respondents

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

Central and Nairobi regions have the highest TV viewership, with Rift region following closely behind. On the other hand, the lowest TV viewership is observed in the South Nyanza regions. These variations in TV viewership across different geographic areas highlight the significance of customizing media strategies to cater to specific regions.



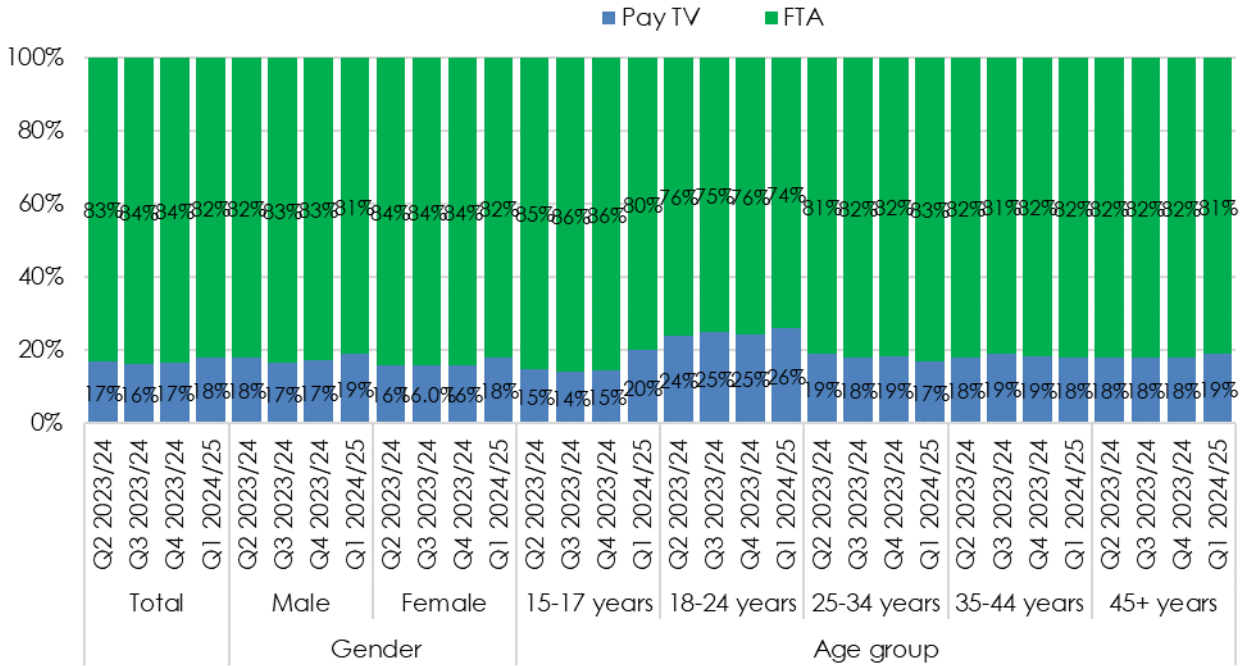
N=32.23M: All Respondents

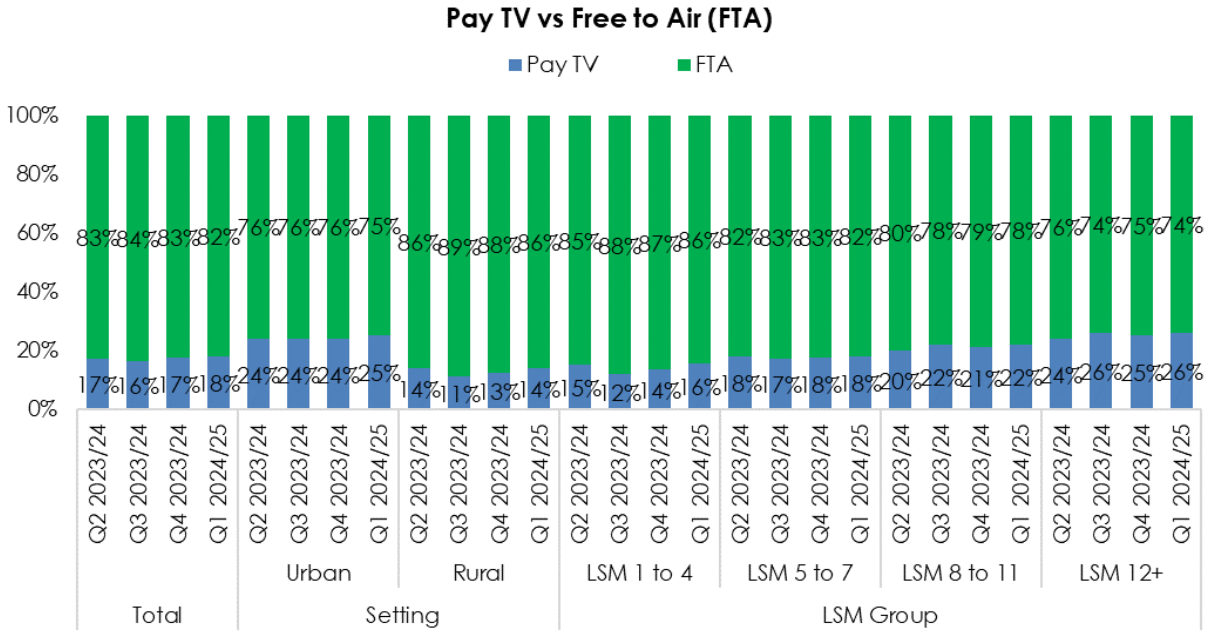
Figure 17: TV Viewership demographics – by total and topography

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

In Kenya, Free to Air (FTA) TV enjoys a notably broader viewership compared to pay TV. For both Pay TV and FTA TV, reach does not vary by gender. However, the reach of pay TV is slightly higher among individuals aged 18 to 24 years, with it being higher for this age group than the older folk.

Pay TV vs Free to Air (FTA)





n=24.3M: Average Daily TV Viewers

Figure 19: Pay TV vs Free to Air TV Reach – total, setting and LSM

### 4.3. Exposure to impact of advertising

A larger audience size along with more ad placements typically means higher potential exposure and impact for an advertising campaign. Most ads are broadcast during peak hours, from 18:00 to 22:00, which suggests the greatest exposure happens during this time.

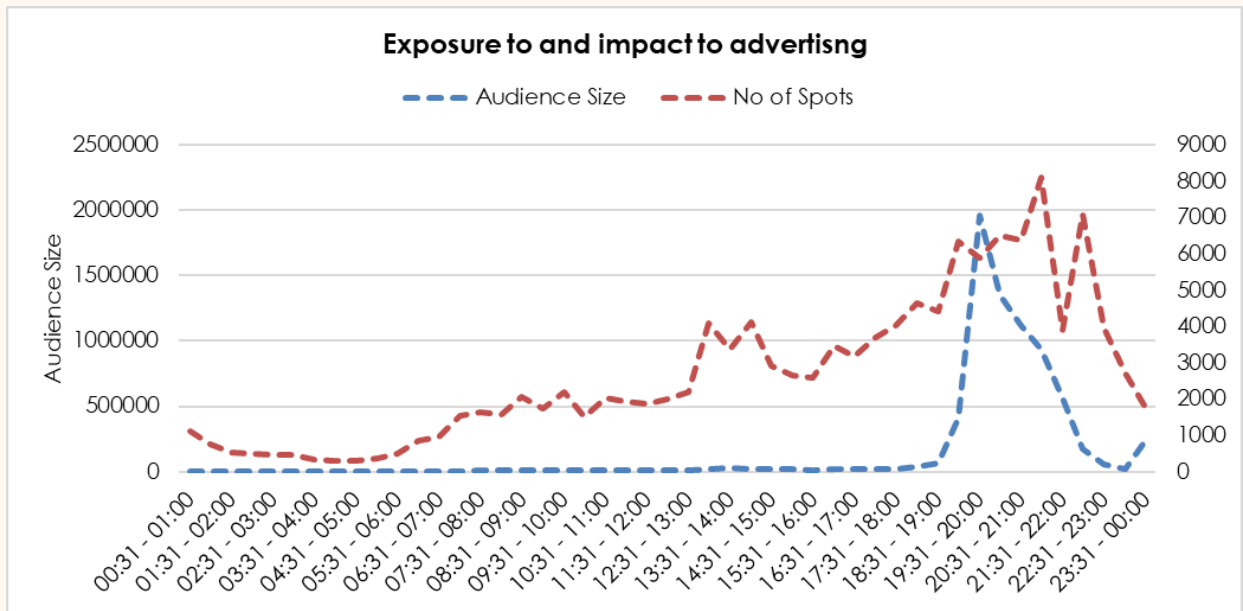
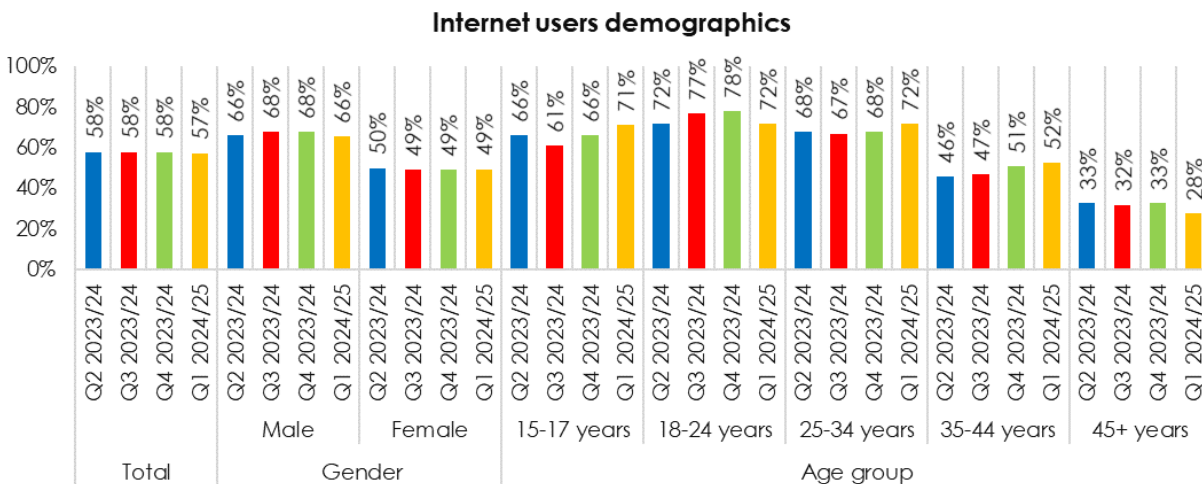


Figure 20: TV exposure to and impact to advertising

## 5. Internet Usage

### 5.1. Internet Access by Demographics

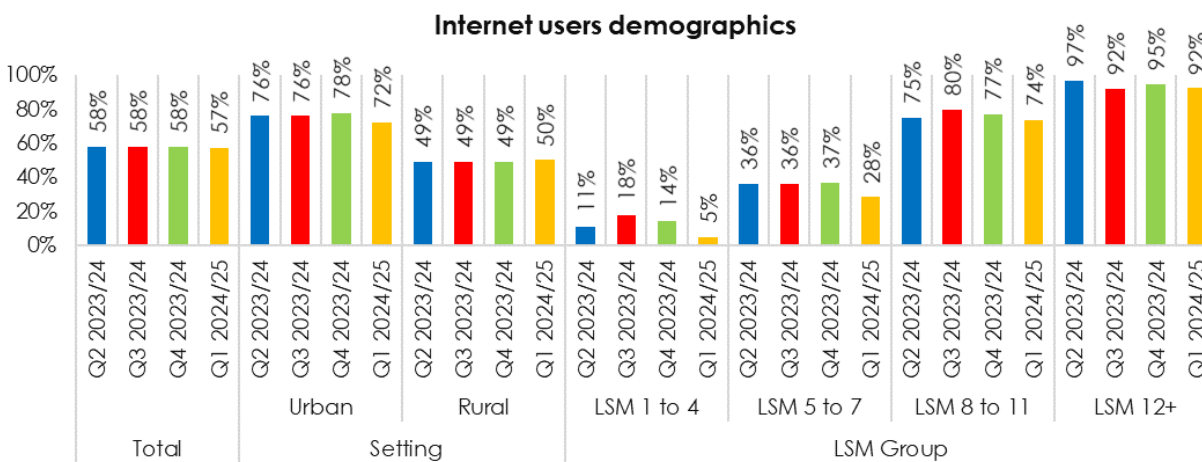
More than half of the respondents are internet users. There are more male than female internet users. In addition, the incidence of internet usage is higher amongst the younger folk aged under 34 years.



n=19.0M: Average Internet Users

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

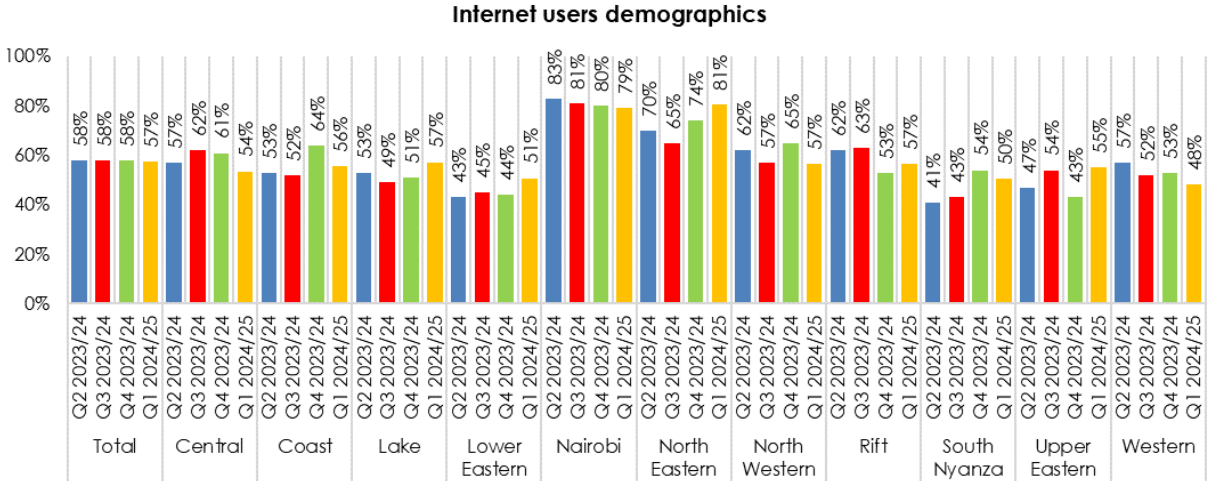
The increased prevalence of internet access in Kenyan urban areas can be attributed to well-established infrastructure, featuring a comprehensive network of high-speed broadband and cellular connectivity. Additionally, urban areas have better socioeconomic resources, fostering greater penetration of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

North Eastern taking the lead in accessibility, followed by Nairobi, while Western records the lowest internet availability.

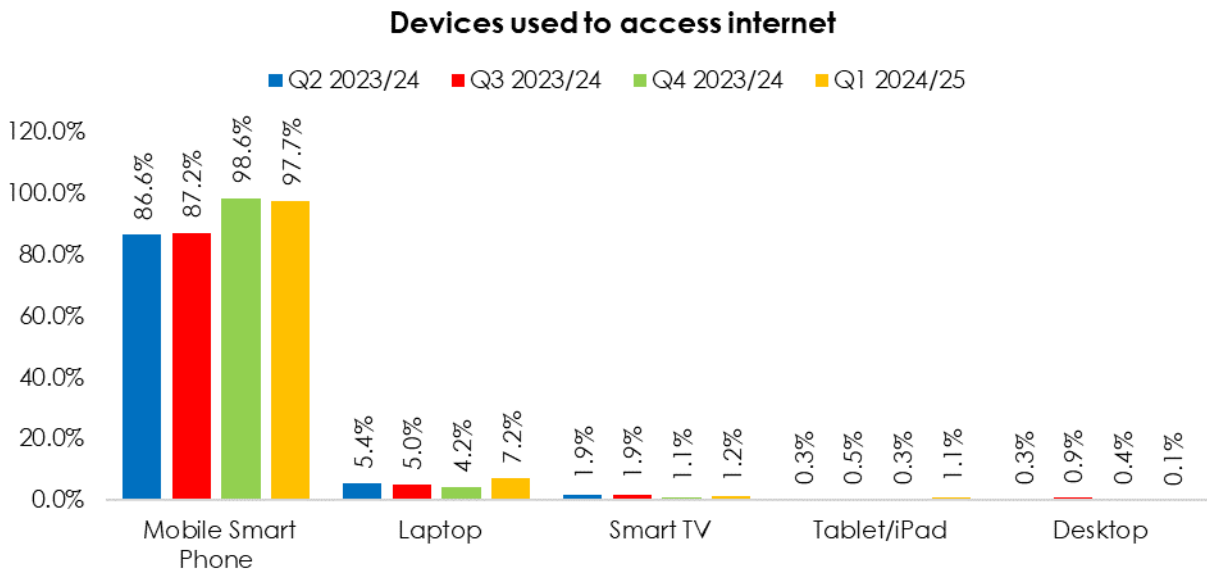


n=19.0M: Average Internet Users

Figure 23: Internet users' demographics – total and topography

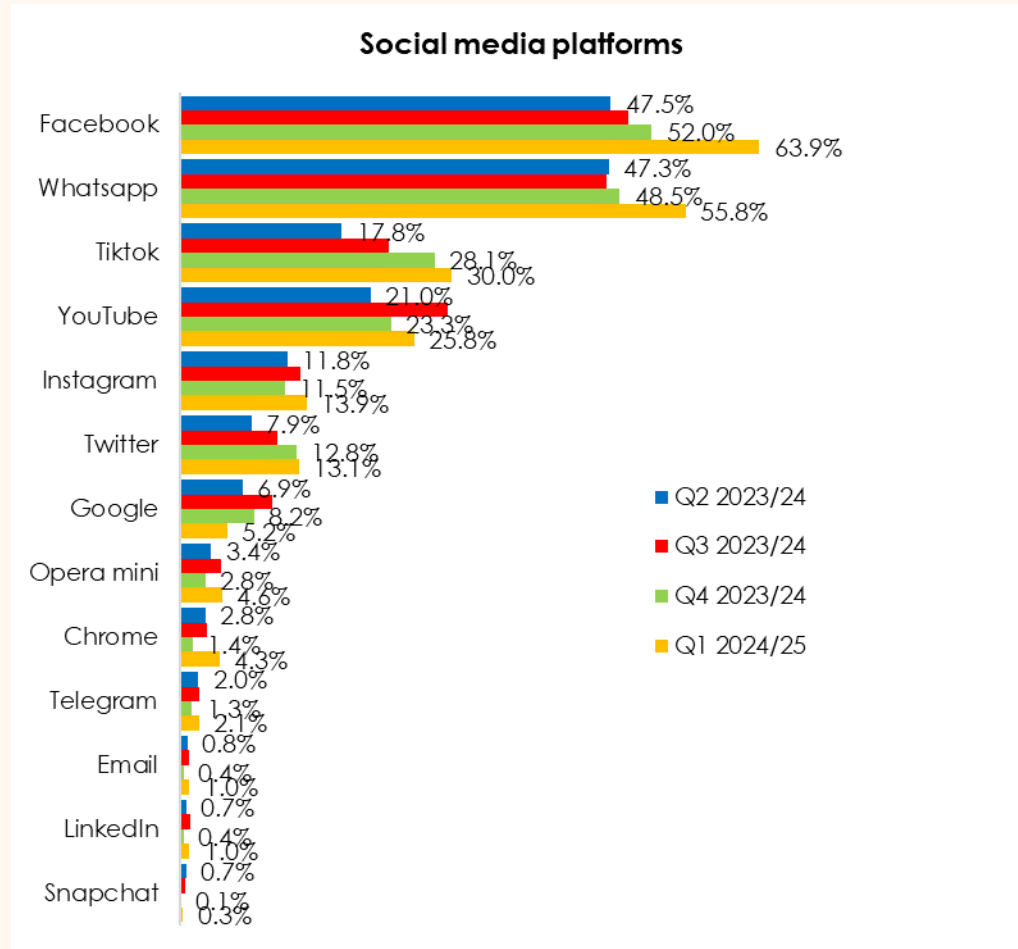
## 5.2. Devices Used

The Most people access the internet mainly through smartphones, highlighting how important these devices are for connecting people and providing information. As mobile technology improves, it's essential to make sure everyone has access to smartphones to promote digital inclusion and close the connectivity gaps among different groups.

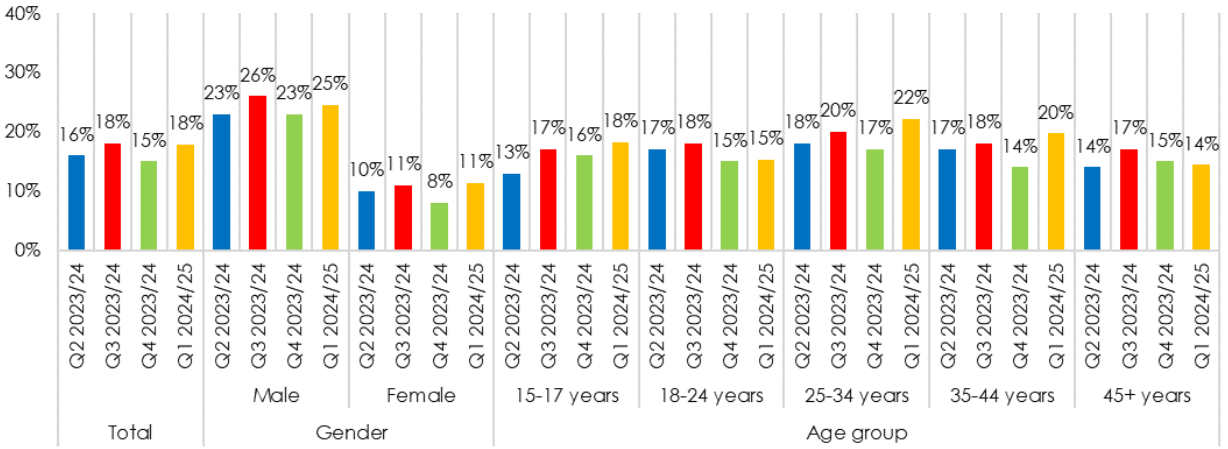


### 5.3. Social Media Platforms

Facebook and WhatsApp are the most popular social media platforms in Kenya, followed by TikTok and YouTube in third and fourth place. The frequent mention of Facebook and WhatsApp shows how widely they are used and how influential they are in Kenya's digital space.



### Newspaper readership

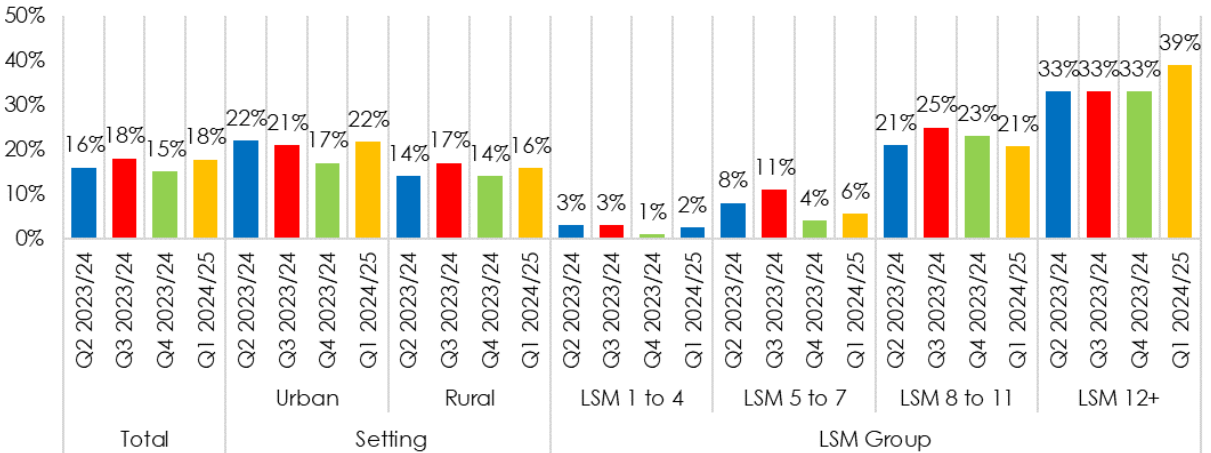


n=32.2M: All Respondents

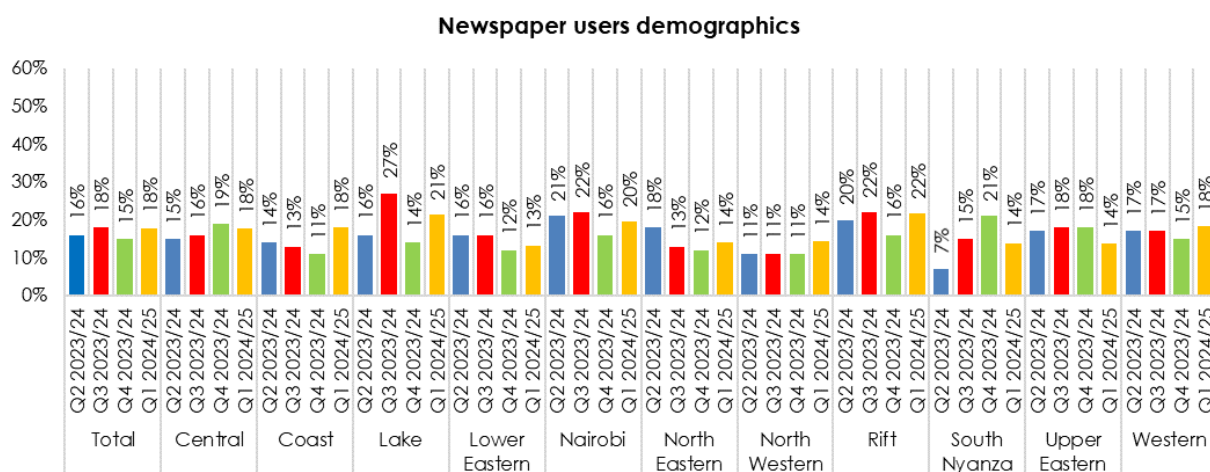
Figure 25: Newspaper readership demographics – by total, gender and age

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

### Newspaper readership



In Q1 2024/25, higher newspaper readership incidences are reported in the Rift, Lake and Nairobi topographies. There has been a slight decrease in readership in the South Nyanza topographies from 21% to 14%.



n=32.2M: All Respondents

Figure 27: Newspaper readership demographics – by total and topography

## 7. Advertising Expenditure

### 7.1. Advertising Expenditure Overview

Sectors	Q2 2023/24	Q3 2023/24	Q4 2023/24	Q1 2024/25	CHANGE (Q1-Q4)
Financial Services	2,392	2,285	2,876	2,262	-21%
Media	3,331	1,996	2,371	3,544	49%
Corporate & Multi-brand	1,929	1,517	1,873	1,753	-6%
Betting & Gaming	1,345	1,403	1,063	2,507	136%
Personal Care	1,112	1,304	1,479	1,572	6%
Communications	1,006	1,166	1,749	1,134	-35%
Beverage	424	925	1,309	594	-55%
Property & Building & Acc.	835	831	1,335	1,126	-16%
Household	851	619	797	524	-34%
Foods	911	612	855	810	-5%
Publishing & Education	419	520	473	505	7%



Tourism & Entertainment	540	506	421	461	9%
Transport	545	506	426	252	-41%
Veterinary & Agriculture	365	418	593	336	-43%
Retail	391	307	235	533	127%
Pharmaceuticals	426	259	443	395	-11%
Office Equipment & Supplies	388	173	338	16	-95%
Clothing, Fabrics & Footwear	31	23	23	42	84%
<b>Total</b>	<b>17,242</b>	<b>15,370</b>	<b>18,659</b>	<b>18,368</b>	<b>21%</b>

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)
Media	2,330	760	454	3,544	19%
Betting & Gaming	1,871	629	7	2,507	14%
Financial Services	1,156	950	157	2,262	12%
Corporate & Multibrand	798	405	550	1,753	10%
Personal Care	1,435	137	0	1,572	9%
Communications	823	304	7	1,134	6%
Property & Building & Acc.	1,022	72	32	1,126	6%
Foods	539	269	1	810	4%
Beverage	283	310	2	594	3%
Retail	383	136	13	533	3%
Household	304	210	10	524	3%
Publishing & Education	300	158	48	505	3%
Tourism & Entertainment	378	68	15	461	3%
Pharmaceuticals	287	94	14	395	2%
Veterinary & Agriculture	63	271	2	336	2%
Transport	79	139	34	252	1%
Clothing, Fabrics & Footwear	37	4	1	42	0%
Office Equipment & Supplies	12	2	2	16	0%
<b>Grand Total</b>	<b>12,099</b>	<b>4,919</b>	<b>1,350</b>	<b>18,368</b>	<b>100%</b>

## 7.2. Year to Date Advertising Trends

While electronic media showed positive trends, media purchasing witnessed an -7% drop by the end of the July 2024 then a positive growth trend to 16% in August and 7% in September 2024.

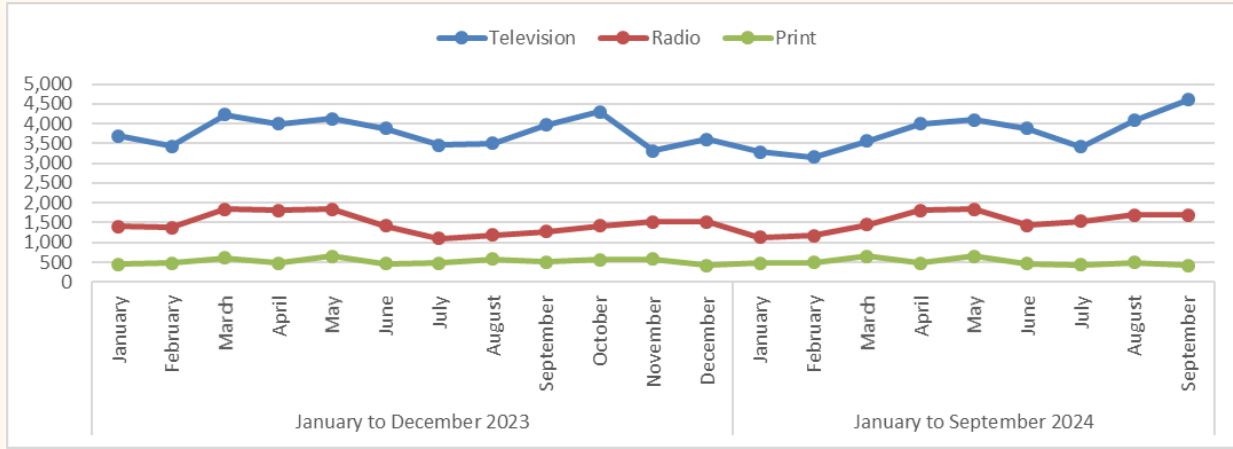
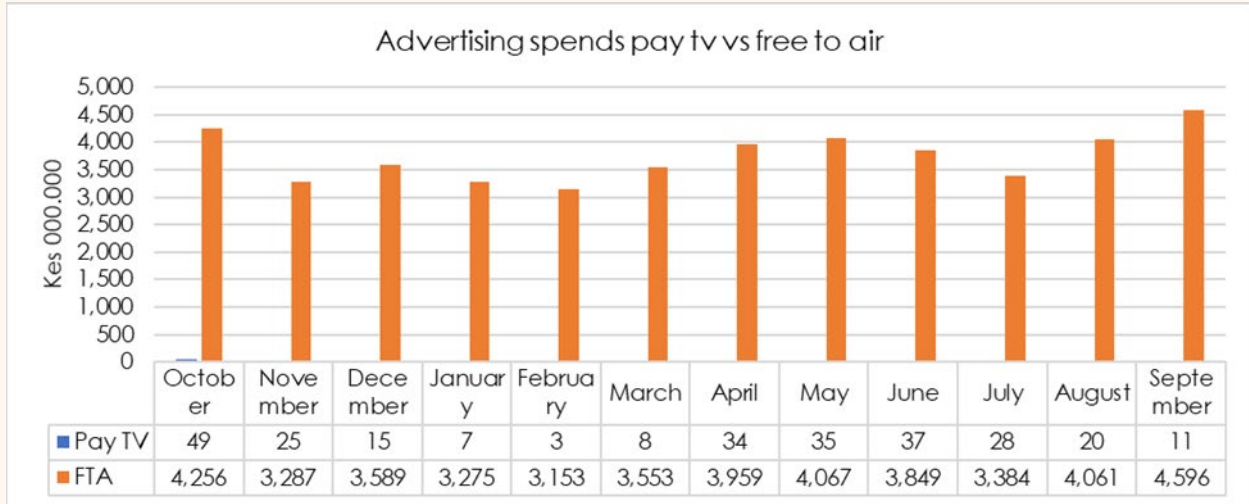


Figure 28: Advertising spends Jan 2023 to September 2024  
Key: Figures in KES Millions (000,000)

## 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.



#### 7.4. TV Spends by Sector/Industry

Despite tough economic times, media and betting & gaming remain strong, as government reduced their media buying.

Table 6: TV spends by sector/industry

Sector/ Industry	Q2 2023/24	Q3 2023/24	Q4 2023/24	Q1 2024/25
Media	1226	1619	1619	2330
Financial Services	1298	1541	1541	1156
Personal Care	1209	1277	1277	1435
Communications	858	1145	1145	823
Property & Building & Acc.	746	1043	1043	1022
Beverage	713	857	857	283
Corporate & Multibrand	479	831	831	798
Betting & Gaming	758	794	794	1871
Foods	446	709	709	539
Household	520	566	566	304
Pharmaceuticals	176	331	331	287
Publishing & Education	317	316	316	300
Office Equipment & Supplies	140	273	273	12
Tourism & Entertainment	402	208	208	378
Transport	357	207	207	79
Retail	186	164	164	383
Veterinary & Agriculture	149	80	80	63
Clothing, Fabrics & Footwear	17	19	19	37

Sector	Q2 2023/24	Q3 2023/24	Q4 2023/24	Q1 2024/25
Financial Services	939	833	1114	950
Betting & Gaming	410	600	229	629
Communications	349	302	585	304

Corporate & Multibrand	419	281	356	405
Media	447	278	322	760
Veterinary & Agriculture	302	267	506	271
Beverage	203	211	442	310
Foods	224	164	144	269
Transport	277	129	180	139
Publishing & Education	63	124	101	158
Retail	123	114	54	136
Personal Care	189	94	201	137
Household	176	89	221	210
Tourism & Entertainment	39	86	206	68
Pharmaceuticals	124	77	105	94
Property & Building & Acc.	86	59	243	72
Office Equipment's & Supplies	78	32	64	2
Clothing, Fabrics & Footwear	5	3	2	4

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 Q2 to Q4. A notable decrease in Q1 2024/25.

Table 8: Print spends by sector/industry

SECTOR	Q2 2023/24	Q3 2023/24	Q4 2023/24	Q1 2024/25
Corporate & Multibrand	685	757	686	550
Media	341	492	430	454
Financial Services	117	153	221	157
Publishing & Education	87	79	56	48
Transport	34	20	40	34
Property & Building & Acc.	25	26	48	32
Tourism & Entertainment	153	18	7	15
Pharmaceuticals	11	6	7	14
Retail	24	7	17	13
Household	11	10	10	10
Communications	16	6	19	7
Betting & Gaming	43	45	40	7
Office Equipment & Supplies	2	1	1	2
Veterinary & Agriculture	2	1	7	2
Beverage	4	1	10	2
Foods	3	2	2	1
Clothing, Fabrics & Footwear	9	4	3	1
Personal Care	1	1	1	0

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

### Challenges in the Broadcasting Industry in Kenya

#### ❖ Decline in Print Media Consumption

- The report highlights a significant decrease in print media consumption, which has impacted the advertising expenditure on this platform. With more people turning to digital platforms, traditional print media is losing its foothold in the industry

#### ❖ Increased Competition from Digital Platforms

- The rise in digital and social media platforms has intensified competition for traditional broadcasters. Platforms like YouTube, Facebook, and TikTok are attracting more users, making it harder for traditional radio and TV stations to capture and retain audience engagement

### Opportunities in the Broadcasting Industry in Kenya

#### ❖ Rise of Digital and social media

- With the increased use of platforms such as Facebook, YouTube, WhatsApp, and TikTok, broadcasters have a chance to expand their reach by incorporating these platforms into their content distribution strategies. This presents an opportunity to engage younger, tech-savvy audiences

#### ❖ Adoption of Mobile Technology

- The wide availability of mobile phones and internet access across Kenya provides broadcasters with an opportunity to deliver content through mobile-friendly formats, allowing them to reach more people and enhance their digital footprint