AUDIENCE MEASUREMENT AND INDUSTRY TRENDS REPORT

January 2026

Table of Contents

1. INTRODUCTION

Kenya's media sector is diverse, mature, and increasingly hybrid, combining a strong traditional broadcasting base with a rapidly expanding digital ecosystem. The country hosts over 200 radio stations broadcasting in national and vernacular languages, ensuring broad cultural and regional reach. The migration to digital terrestrial television in 2015 strengthened the television landscape, while widespread mobile phone adoption and high internet penetration have significantly expanded access to digital and social media content.

Advertising investment continues to underscore the central role of media in Kenya's economy. Free-to-Air television remains the dominant platform for advertising expenditure due to its unmatched national reach, supported by radio's strength in frequency and regional penetration. At the same time, digital advertising has recorded sustained growth, driven by mobile-first consumption, social media usage, and online video engagement, resulting in a more competitive and fragmented advertising environment.

Within this evolving landscape, media houses face increasing pressure to retain audiences, demonstrate value to advertisers, and adapt to shifting consumption patterns across platforms. Robust audience and industry research is therefore essential to inform evidence-based decision-making, support effective regulation, and guide content, investment, and monetization strategies in Kenya's rapidly transforming media industry.

2. MEDIA AUDIENCE MEASUREMENT

2.1. Ways in Which Media is Consumed

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

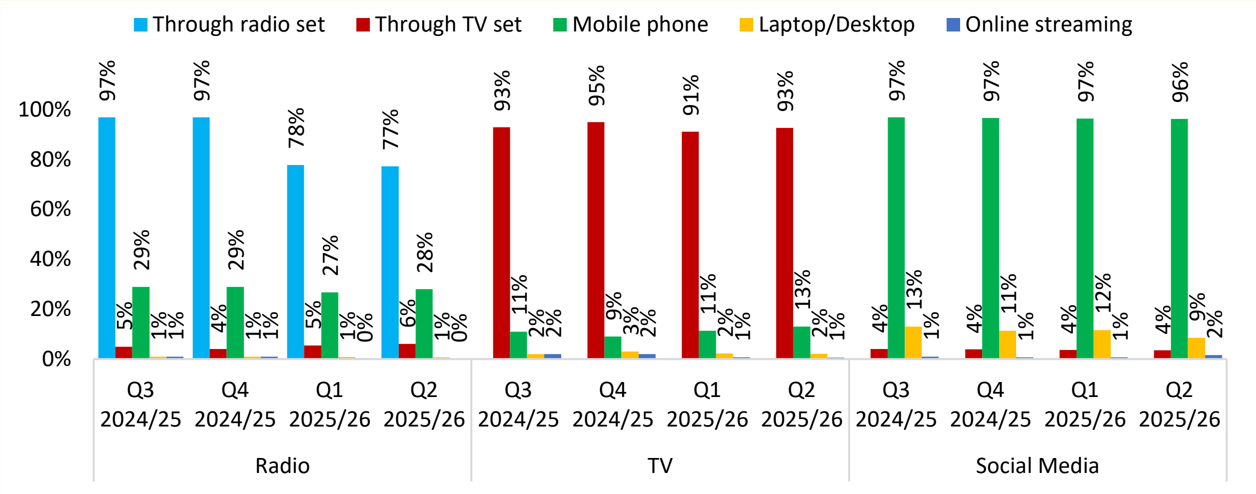


Figure 1: Ways in which media is consumed by total

2.2. Place of Media Consumption

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

Table 1: Place of media consumption by total

Place of Media Consumption	Total				Radio				TV			
	Q3 2024/25	Q4 2024/25	Q1 2025/26	Q2 2025/26	Q3 2024/25	Q4 2024/25	Q1 2025/26	Q2 2025/26	Q3 2024/25	Q4 2024/25	Q1 2025/26	Q2 2025/26
At own home	89%	90%	90%	89%	86%	87%	87%	89%	86%	86%	90%	89%
Place of work	4%	4%	3%	4%	3%	3%	3%	3%	4%	4%	4%	4%
Bar/Restaurant/Hotel	2%	2%	6%	2%	3%	3%	2%	4%	7%	7%	8%	6%
Someone else's household	2%	3%	1%	3%	2%	2%	2%	2%	3%	3%	3%	1%
Bus/Taxi/Matatu	1%	1%	1%	1%	2%	2%	2%	2%	0%	0%	0%	0%
In car - Private	1%	1%	2%	1%	2%	2%	2%	2%	0%	0%	0%	0%
On the move	1%	1%	1%	0%	1%	1%	1%	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 usage fluctuating narrowly between 73% and 75%, while television remained similarly stable at 73–75%. Internet usage shows a modest upward trend, increasing from 56% in Q3 2024/25 to a peak of 60% in Q1 2025/26, before slightly easing to 59% in Q2 2025/26.Internet usage shows a modest upward trend, increasing from 56% in Q3 2024/25 to a peak of 60% in Q1 2025/26, before slightly easing to 59% in Q2 2025/26.

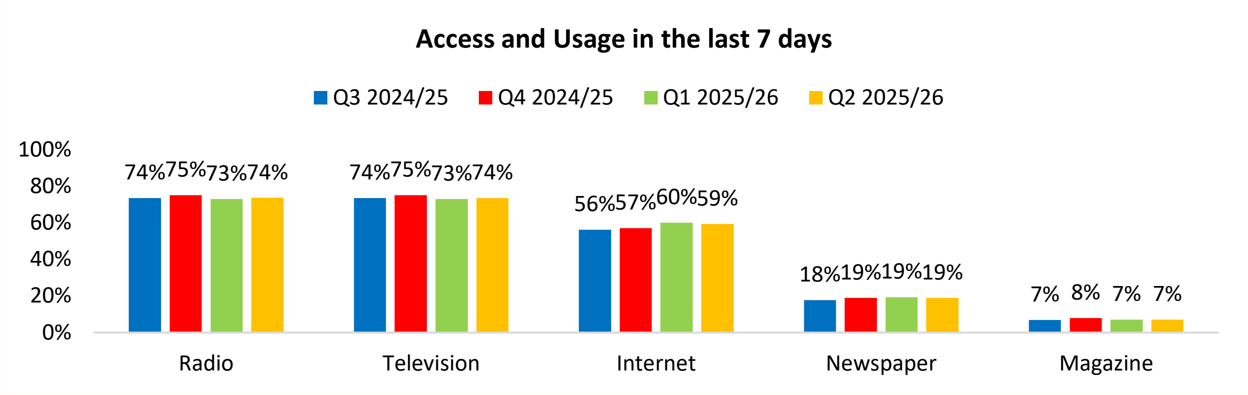


Figure 2: Access and Usage of media by total

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.

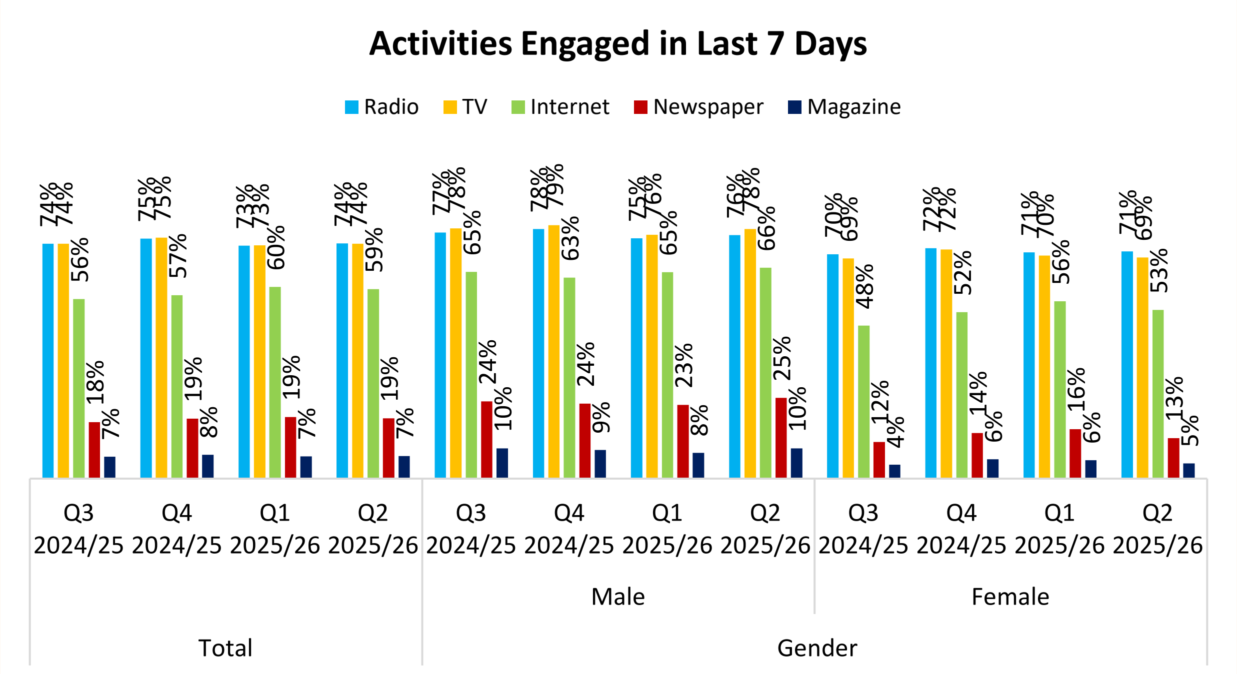


Figure 3: Activities Engaged in Last 7 Days - by total & gender

Among individuals in the LSM 1 to 4 category, radio remains the dominant medium due to its accessibility and affordability. Radios, particularly battery-operated ones, are more practical for households that may lack consistent electricity or the infrastructure required to support television usage. This makes radio a more viable and reliable source of information and entertainment for lower-income groups. Equally, in urban areas and among individuals in the higher LSM 12+ category, television consumption is notably higher. These groups typically have better access to electricity, internet, and a wider range of media devices, enabling more frequent and diverse engagement with TV content. This contrast highlights the influence of both socio-economic status and infrastructure availability on media consumption preferences.

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

		Quarter	Radio	TV	Internet	Newspaper	Magazine
Total		Q3 2024/25	74%	74%	56%	18%	7%
		Q4 2024/25	75%	75%	57%	19%	8%
		Q1 2025/26	73%	73%	60%	19%	7%
		Q2 2025/26	74%	74%	59%	19%	7%
LSM Group	LSM 1 to 4	Q3 2024/25	90%	24%	8%	3%	1%
		Q4 2024/25	90%	28%	8%	2%	1%
		Q1 2025/26	90%	24%	9%	3%	2%
		Q2 2025/26	95%	21%	4%	2%	1%
	LSM 5 to 7	Q3 2024/25	74%	69%	28%	7%	2%

		Q4 2024/25	75%	68%	29%	7%	2%
		Q1 2025/26	76%	65%	26%	7%	3%
		Q2 2025/26	75%	66%	25%	7%	3%
	LSM 8 to 11	Q3 2024/25	71%	85%	75%	21%	8%
		Q4 2024/25	73%	86%	74%	22%	8%
		Q1 2025/26	72%	80%	75%	21%	7%
		Q2 2025/26	72%	80%	73%	21%	6%
	LSM 12+	Q3 2024/25	68%	92%	92%	39%	17%
		Q4 2024/25	70%	93%	92%	41%	20%
		Q1 2025/26	63%	92%	92%	38%	15%
		Q2 2025/26	65%	93%	93%	36%	17%

In Q2 2025/26, radio and television were the most accessed media nationally, each reaching 73%. Radio use was highest in Lower Eastern, Lake, Rift, and Western, while television viewership peaked in Nairobi and Upper Eastern, supported by better infrastructure and access. Internet access remained strongest in Nairobi, followed by North Eastern, reflecting continued growth in digital engagement. Newspaper readership was highest in Lake and Lower Eastern, while magazine consumption remained low across all regions.

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

	Quarter	Radio	TV	Internet	Newspaper	Magazine
Total	Q3 2024/25	74%	74%	56%	18%	7%
	Q4 2024/25	75%	75%	57%	19%	8%
	Q1 2025/26	73%	73%	60%	19%	7%
	Q2 2025/26	74%	74%	59%	19%	7%
Central	Q3 2024/25	74%	81%	55%	18%	6%
	Q4 2024/25	70%	71%	54%	17%	9%
	Q1 2025/26	71%	78%	60%	20%	5%
	Q2 2025/26	74%	79%	59%	19%	6%
Coast	Q3 2024/25	67%	67%	54%	14%	7%
	Q4 2024/25	70%	71%	54%	17%	9%
	Q1 2025/26	71%	68%	58%	11%	5%
	Q2 2025/26	68%	69%	58%	15%	5%
Lake	Q3 2024/25	81%	74%	52%	21%	9%
	Q4 2024/25	81%	76%	52%	21%	10%
	Q1 2025/26	83%	74%	53%	22%	9%
	Q2 2025/26	82%	74%	62%	24%	9%
Lower Eastern	Q3 2024/25	82%	71%	50%	16%	8%
	Q4 2024/25	86%	69%	52%	16%	8%
	Q1 2025/26	83%	72%	52%	22%	12%
	Q2 2025/26	83%	73%	50%	19%	13%

Nairobi	Q3 2024/25	62%	83%	77%	21%	6%
	Q4 2024/25	64%	85%	80%	21%	8%
	Q1 2025/26	60%	81%	80%	21%	7%
	Q2 2025/26	63%	84%	80%	22%	6%
North Eastern	Q3 2024/25	39%	66%	80%	13%	8%
	Q4 2024/25	45%	69%	84%	18%	10%
	Q1 2025/26	30%	68%	76%	19%	3%
	Q2 2025/26	34%	63%	76%	14%	2%
North Western	Q3 2024/25	57%	70%	58%	16%	6%
	Q4 2024/25	53%	73%	60%	15%	4%
	Q1 2025/26	61%	67%	69%	16%	6%
	Q2 2025/26	59%	70%	68%	15%	4%
Rift	Q3 2024/25	81%	71%	53%	20%	9%
	Q4 2024/25	81%	75%	55%	20%	8%
	Q1 2025/26	82%	68%	56%	20%	7%
	Q2 2025/26	81%	72%	56%	19%	8%
South Nyanza	Q3 2024/25	80%	64%	46%	17%	6%
	Q4 2024/25	84%	63%	50%	16%	7%
	Q1 2025/26	79%	68%	49%	20%	8%
	Q2 2025/26	80%	63%	48%	20%	8%
Upper Eastern	Q3 2024/25	78%	77%	57%	14%	6%
	Q4 2024/25	78%	79%	58%	15%	5%
	Q1 2025/26	76%	80%	64%	18%	6%
	Q2 2025/26	79%	77%	59%	17%	7%
Western	Q3 2024/25	82%	67%	48%	18%	6%
	Q4 2024/25	84%	68%	50%	20%	6%
	Q1 2025/26	81%	69%	53%	20%	8%
	Q2 2025/26	81%	68%	48%	19%	7%

2.4. Number of Media Consumed

In Q2 2025/26, the share of individuals consuming only one media platform edged up to 26%, indicating a slight shift away from broader media use. Consumption of two media platforms declined marginally from 35% in Q4 2024/25 to 33% in Q1 2025/26, reflecting continued but moderate cross-platform engagement. Meanwhile, multiple media consumption (three or more platforms) remained stable at around 40% in Q1 and Q2 2025/26, following fluctuations in earlier quarters.

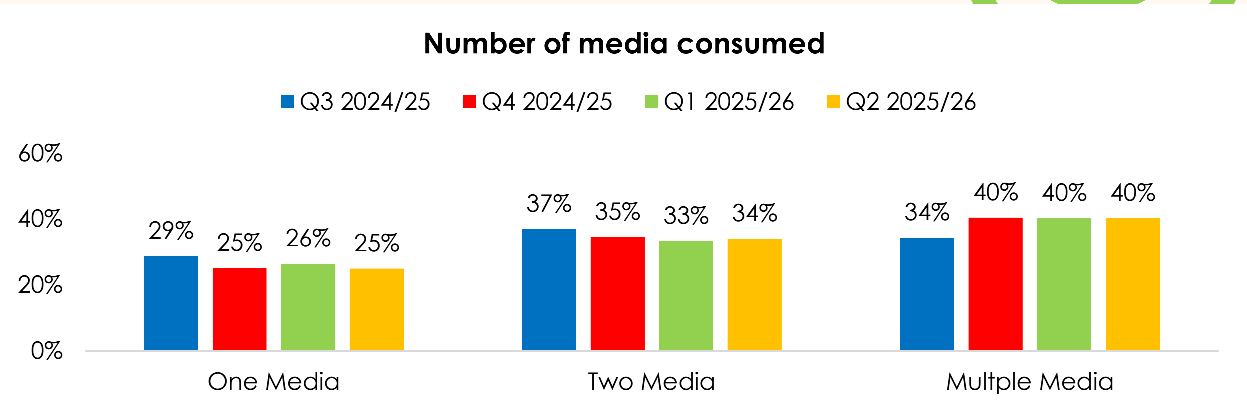


Figure 4: Number of media consumed by total

2.5. Type of Media Consumed

Across the four quarters, media consumption patterns consistently indicate a strong preference for multi-platform engagement, particularly combinations involving radio, television, and online platforms. The radio–TV–online mix remained the most common combination, peaking at 28.1% in Q3 2024/25 before stabilizing at around 21% in subsequent quarters. The combination of radio and television also remained popular, though it declined slightly to 14.7% in Q1 2025/26.

Single-platform consumption persists, with radio-only users accounting for about 14–15% across the period, highlighting the continued relevance of traditional media alongside growing digital use. Consumption of only television or only online platforms remained relatively stable, while niche combinations involving print media remained low but consistent. Overall, the findings reinforce the central role of radio, television, and online platforms in shaping Kenya's media consumption landscape.

Table 4: Type of media Consumed by total

Type of Media Consumed	Q3 2024/25	Q4 2024/25	Q1 2025/26	Q2 2025/26
Radio+TV+Online	28.10%	21.40%	20.80%	20.70%
Radio+TV	18.90%	17.10%	14.70%	15.50%
Radio Only	16.00%	14.40%	14.50%	14.80%
All Media	4.70%	13.70%	13.10%	13.60%
TV+Online	12.90%	11.50%	11.90%	12.00%
TV Only	7.60%	6.50%	6.50%	6.10%
Online Only	5.00%	4.00%	5.30%	5.40%
Radio+Online	4.60%	4.00%	5.00%	4.30%
Radio+TV+Print	0.90%	3.30%	3.10%	3.20%
TV+Print+Online	0.50%	1.50%	2.30%	2.00%
Print+Online	0.30%	0.80%	0.50%	0.40%
Radio+Print	0.20%	0.70%	0.70%	0.70%
Radio+Print+Online	0.20%	0.50%	0.90%	0.80%
TV+Print	0.10%	0.40%	0.40%	0.40%
Print Only	0.00%	0.10%	0.00%	0.00%

2.6. Frequency of Media Consumption

In Q2 2025/26, daily media consumption remained strongest for television, radio, and social media. Television and radio were each used daily by around half of the population (49–50%), underscoring their continued dominance in everyday media habits. Social media recorded daily use by 31% of audiences, marking a modest recovery compared to the previous quarter. In contrast, online video streaming remained a secondary medium, with only about 31% reporting daily use and half of the population (50%) engaging rarely or never.

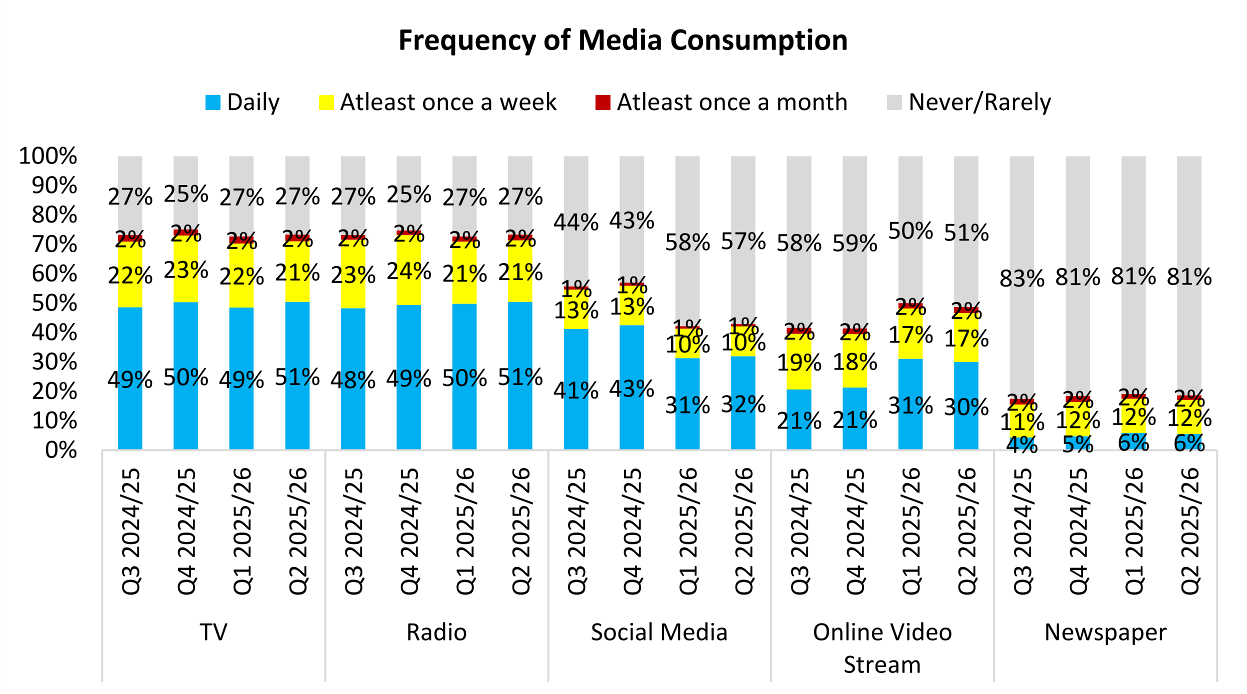


Figure 5: Frequency of consuming Tv, radio, social media, online streams and newspapers

2.7. Demographics of Media Consumers Profiles

In Q2 2025/26, media consumption patterns remained consistent across demographic and socioeconomic groups. Men continued to lead in newspaper readership and online use, while radio and TV consumption was broadly balanced by gender. Young adults aged 18–34 especially those aged 25–34 were the most active consumers across all platforms, whereas the 15–17 age group showed the lowest engagement, particularly with traditional media. Older audiences (45+) continued to favor radio and TV, with limited online use.

Geographically, rural audiences dominated radio and TV consumption, while urban residents led in online and print media use. Socioeconomic disparities persisted, with lower LSM groups (1–4) relying heavily on radio, middle LSM groups (5–7) exhibiting moderate multi-platform use, and higher LSM groups (8–11 and 12+) showing the strongest engagement with TV, online platforms, and newspapers.

Table 5: Demographics of media consumers in Kenya – LSM, age, setting and gender

Demographics		Financial Year	Radio Listeners, n=23.9M	TV Viewers, n=23.9M	Newspaper Readership, n=6.3M	Online Usage, n=19.6M
Gender	Male	Q3 2024/25	52%	52%	67%	57%

		Q4 2024/25	51%	52%	62%	54%
		Q1 2025/26	51%	51%	59%	53%
		Q2 2025/26	51%	52%	66%	55%
	Female	Q3 2024/25	48%	48%	33%	43%
		Q4 2024/25	49%	48%	39%	46%
		Q1 2025/26	49%	49%	41%	47%
		Q2 2025/26	49%	48%	34%	45%
Age group	15-17 years	Q3 2024/25	11%	11%	10%	14%
		Q4 2024/25	10%	11%	11%	15%
		Q1 2025/26	11%	11%	11%	14%
		Q2 2025/26	11%	12%	12%	14%
	18-24 years	Q3 2024/25	20%	22%	22%	27%
		Q4 2024/25	20%	23%	22%	27%
		Q1 2025/26	20%	22%	22%	27%
		Q2 2025/26	21%	22%	19%	26%
	25-34 years	Q3 2024/25	23%	26%	28%	30%
		Q4 2024/25	24%	25%	30%	30%
		Q1 2025/26	24%	26%	27%	28%
		Q2 2025/26	23%	25%	26%	29%
	35-44 years	Q3 2024/25	19%	18%	18%	16%
		Q4 2024/25	19%	18%	18%	16%
		Q1 2025/26	19%	18%	18%	16%
		Q2 2025/26	18%	18%	20%	17%
	45+ years	Q3 2024/25	27%	23%	21%	13%
		Q4 2024/25	27%	23%	20%	13%
		Q1 2025/26	27%	24%	23%	15%
		Q2 2025/26	27%	24%	23%	14%
Setting	Urban	Q3 2024/25	28%	36%	41%	43%
		Q4 2024/25	28%	36%	42%	42%
		Q1 2025/26	29%	35%	40%	42%
		Q2 2025/26	29%	36%	39%	42%
	Rural	Q3 2024/25	72%	64%	59%	57%
		Q4 2024/25	72%	65%	58%	58%
		Q1 2025/26	71%	65%	60%	59%
		Q2 2025/26	71%	64%	61%	58%
LSM Group	LSM 1 to 4	Q3 2024/25	17%	4%	2%	2%
		Q4 2024/25	15%	5%	1%	2%
		Q1 2025/26	14%	4%	1%	2%

		Q2 2025/26	13%	3%	1%	1%
	LSM 5 to 7	Q3 2024/25	27%	25%	10%	13%
		Q4 2024/25	26%	23%	10%	13%
		Q1 2025/26	24%	21%	9%	10%
		Q2 2025/26	23%	20%	8%	10%
	LSM 8 to 11	Q3 2024/25	42%	51%	53%	59%
		Q4 2024/25	44%	52%	53%	58%
		Q1 2025/26	45%	50%	49%	56%
		Q2 2025/26	46%	51%	50%	57%
	LSM 12+	Q3 2024/25	14%	20%	35%	26%
		Q4 2024/25	16%	21%	37%	27%
		Q1 2025/26	18%	26%	41%	32%
		Q2 2025/26	18%	26%	40%	33%

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 record the lowest levels across all quarters.

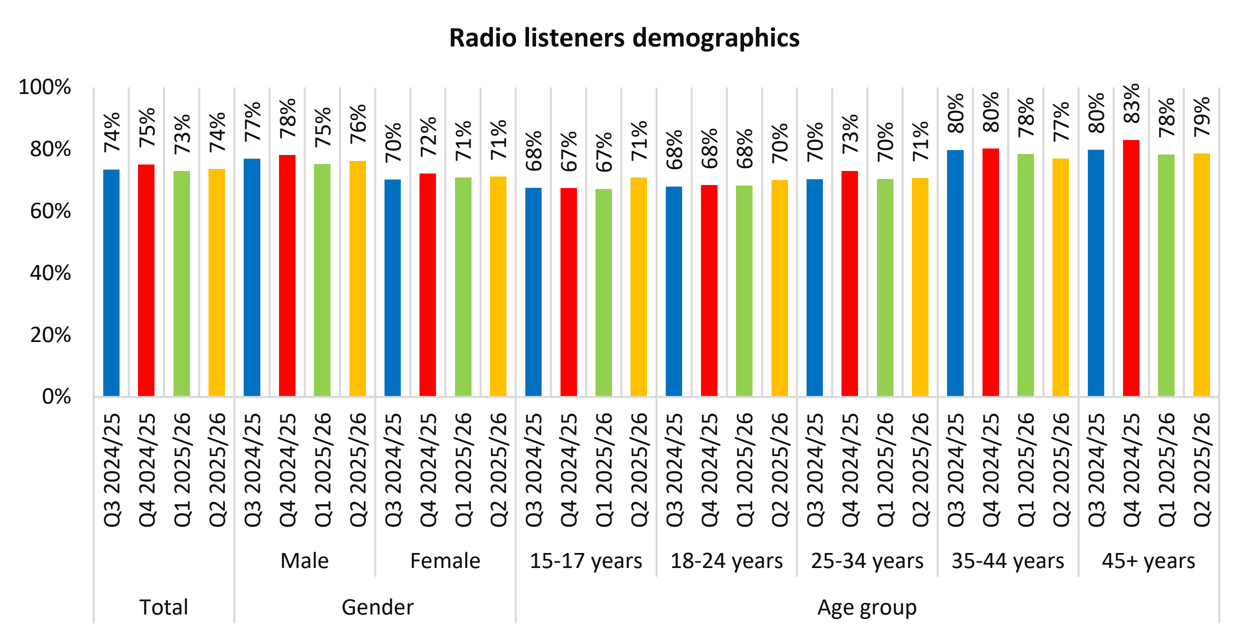


Figure 6: Demographics of radio consumers– by total, gender & age group

Radio listenership is consistently higher in rural than urban areas and peaks among lower LSM groups (LSM 1–4), remaining above 90%, before declining steadily with rising socioeconomic status, reaching the lowest levels among LSM 12+.

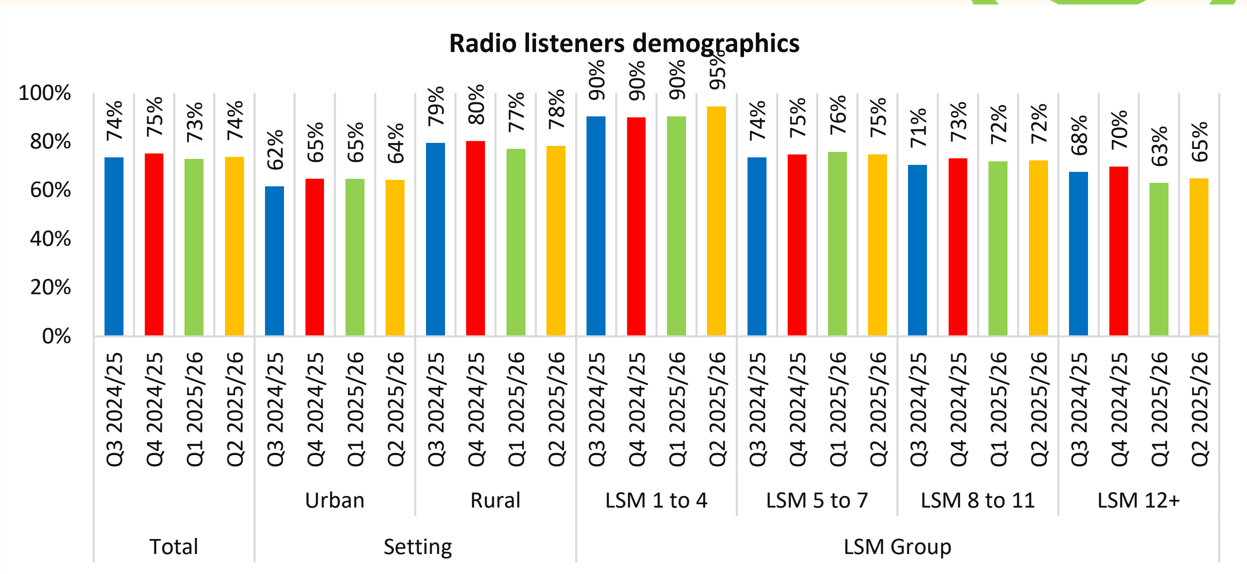


Figure 7: Demographics of radio consumers– by total, setting and LSM

In Q2 2025/26, radio listenership was highest in Lower Eastern, Lake, Rift, and Western regions (80%+), while North Eastern recorded the lowest uptake, with Nairobi and North Western also trailing the national average highlighting clear regional disparities in radio use.

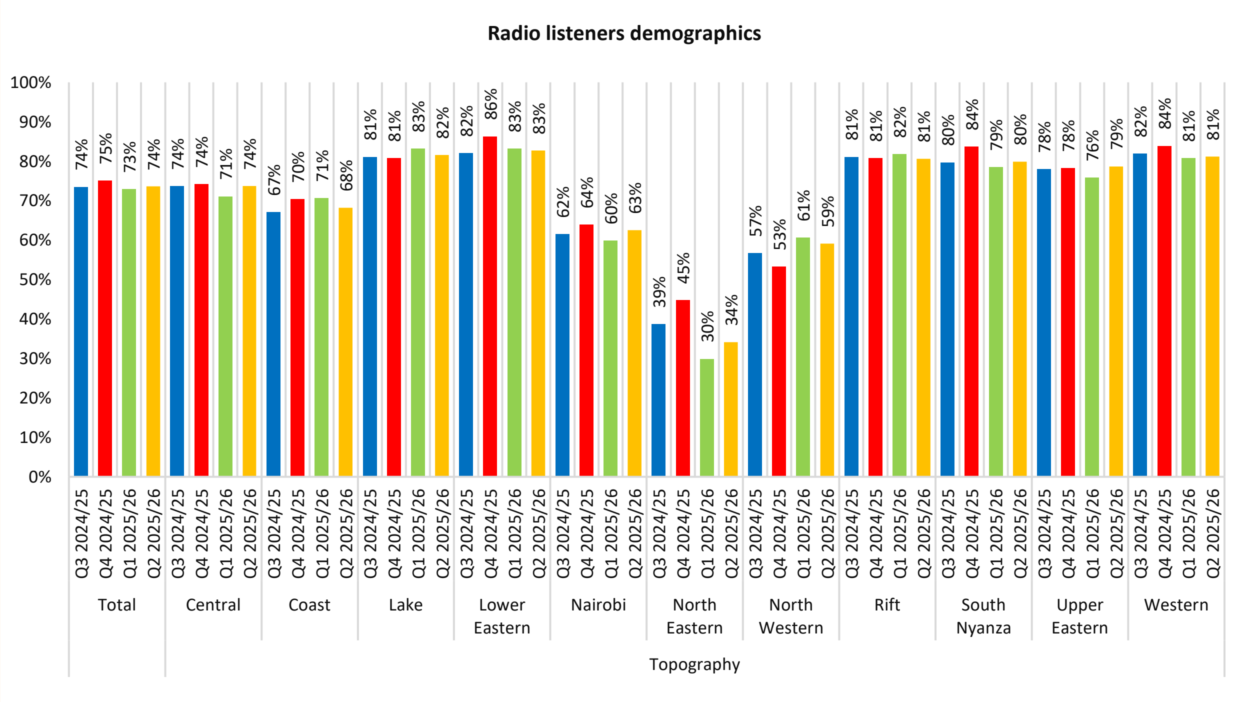


Figure 8: Demographics of radio consumers– by total, Topography

3.2. Radio Genre Preference

Radio listenership in Kenya is strongly driven by news and current affairs, which account for just over four in ten listeners, highlighting radio's central role as a trusted source of information.

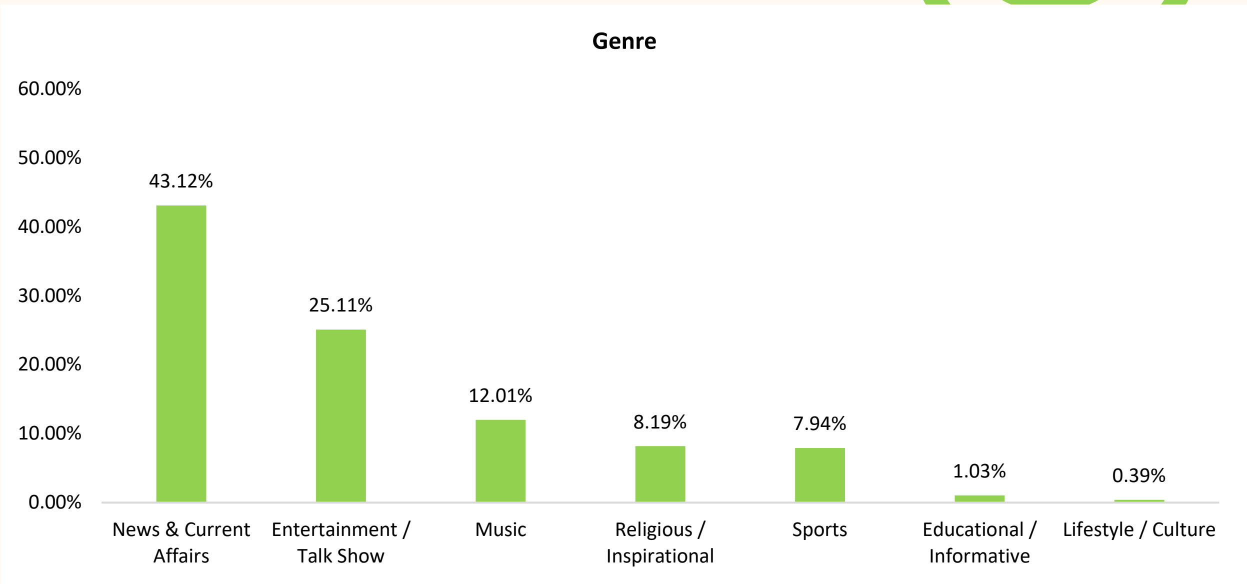


Figure 9: Radio Genre Preference

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. On average, more than 60% of male listeners and around 55% of female listeners tune into Swahili-language stations. Vernacular stations remain the second most preferred, with a slightly higher uptake among female audiences compared to males. English-language stations attract the smallest share of listeners, though their audience remains stable across quarters and genders.

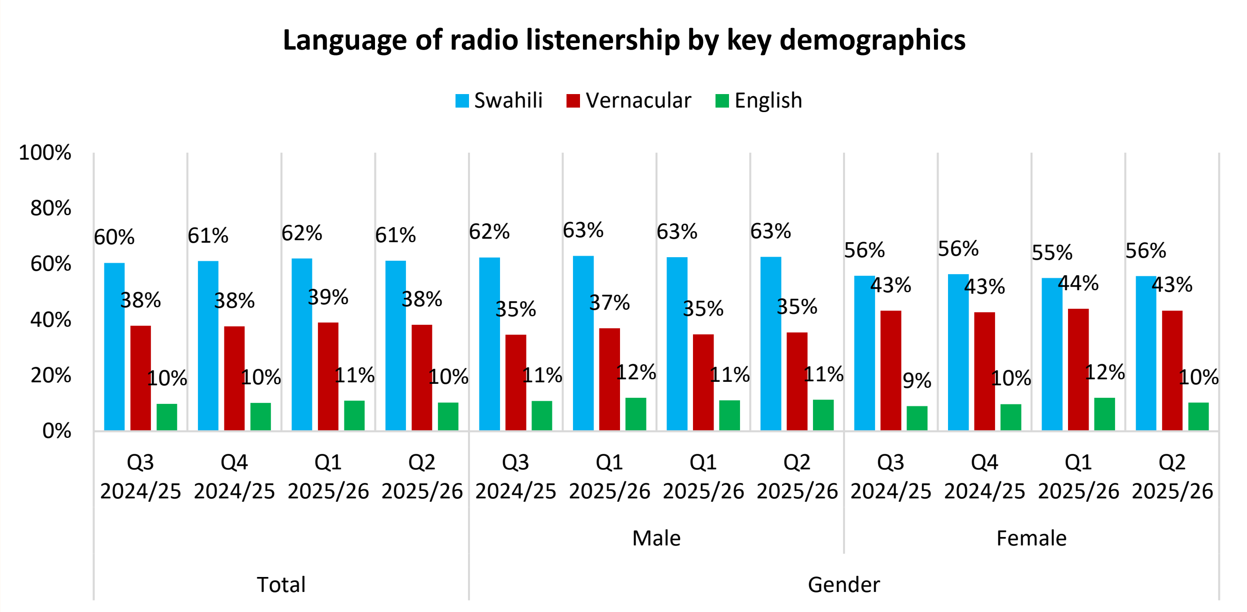


Figure 10: Radio listenership language by total and gender

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

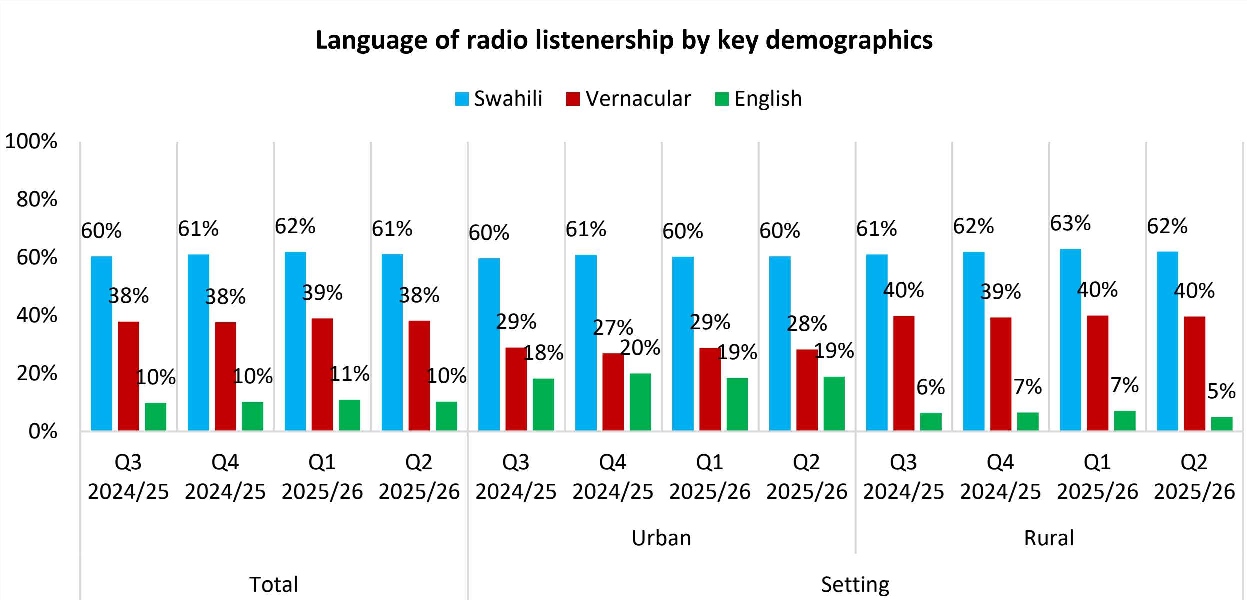


Figure 11: Radio listenership language by total & setting

Swahili and vernacular languages are the main languages used for radio listening among lower to middle LSM groups (LSM 1–11). More than 60% listen to Swahili stations, while 35–49% tune in to vernacular stations, showing a strong preference for familiar and easy-to-understand local content. Among higher LSM listeners (LSM 12+), language use is more mixed: Swahili listenership increased slightly to about 54%, while English radio listening increases, reaching 16% in Q2 2025/26. This suggests that higher-income and more educated audiences are more likely to listen to English-language radio.

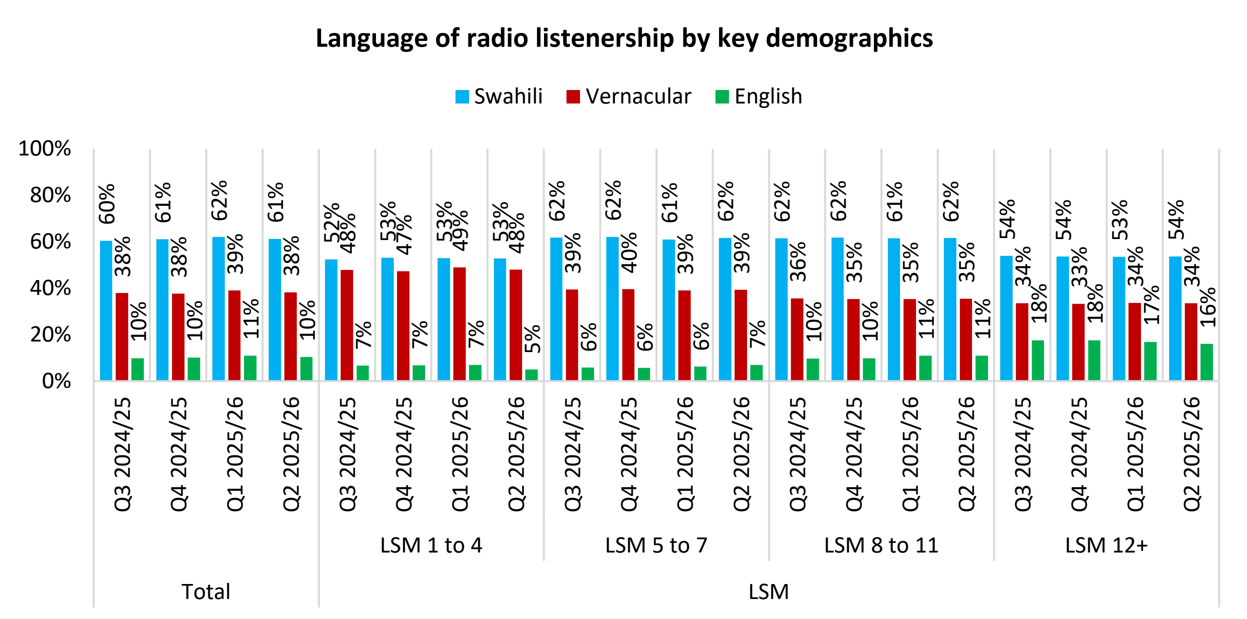


Figure 12: Radio listenership language by total & LSM

Swahili-language radio stations have the strongest following in Western and South Nyanza, where listenership consistently exceeds at 88% in Western in Q2 2025/26. Similarly high Swahili preference is also seen in Rift and South Nyanza. Conversely, vernacular radio has its highest uptake in Lower Eastern and Lake regions, where it regularly surpasses 58% of listeners. This reflects strong cultural and linguistic ties in these areas. English-language radio, though limited in reach overall, finds relatively greater traction in urbanized regions like Nairobi and North Eastern, with Nairobi recording a consistent 21–24% share across quarters.

Table 6: Radio listenership language by total and topography

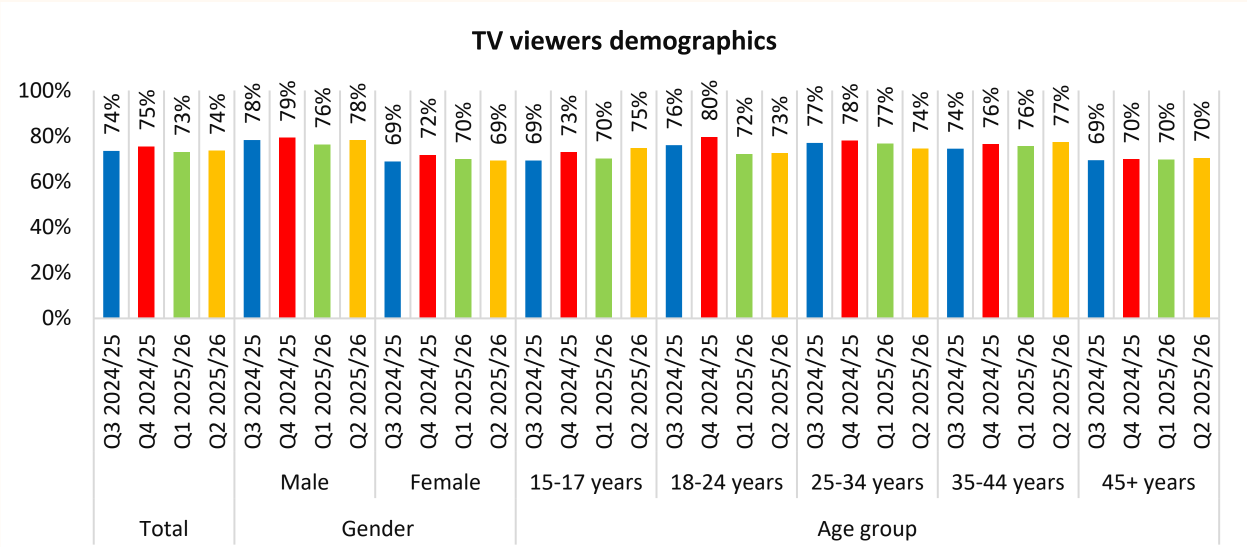
Total/ Topography		Financial Year	Radio listenership language		
			Swahili	Vernacular	English
Total		Q3 2024/25	60%	39%	10%
		Q4 2024/25	60%	39%	10%
		Q1 2025/26	62%	39%	11%
		Q2 2025/26	61%	38%	10%
Topography	Central	Q3 2024/25	44%	52%	10%
		Q4 2024/25	44%	52%	11%
		Q1 2025/26	45%	53%	10%
		Q2 2025/26	44%	52%	10%
	Coast	Q3 2024/25	61%	32%	15%
		Q4 2024/25	61%	31%	15%
		Q1 2025/26	62%	32%	13%
		Q2 2025/26	61%	32%	14%
	Lake	Q3 2024/25	47%	58%	4%
		Q4 2024/25	48%	57%	5%
		Q1 2025/26	45%	58%	5%
		Q2 2025/26	47%	58%	5%
	Lower Eastern	Q3 2024/25	36%	63%	7%
		Q4 2024/25	37%	62%	8%
		Q1 2025/26	36%	63%	8%
		Q2 2025/26	36%	63%	8%
	Nairobi	Q3 2024/25	67%	16%	23%
		Q4 2024/25	67%	17%	23%
		Q1 2025/26	67%	16%	24%
		Q2 2025/26	67%	16%	24%
	North Eastern	Q3 2024/25	53%	27%	26%
		Q4 2024/25	53%	27%	26%
		Q1 2025/26	54%	27%	25%
		Q2 2025/26	53%	27%	26%
	North Western	Q3 2024/25	67%	32%	11%
		Q4 2024/25	67%	31%	12%
		Q1 2025/26	68%	33%	10%
		Q2 2025/26	67%	32%	11%
	Rift	Q3 2024/25	69%	29%	9%

		Q4 2024/25	69%	29%	9%
		Q1 2025/26	71%	30%	8%
		Q2 2025/26	70%	29%	8%
	South Nyanza	Q3 2024/25	78%	24%	6%
		Q4 2024/25	78%	24%	7%
		Q1 2025/26	77%	25%	6%
		Q2 2025/26	78%	25%	6%
	Upper Eastern	Q3 2024/25	47%	49%	9%
		Q4 2024/25	48%	48%	9%
		Q1 2025/26	49%	51%	8%
		Q2 2025/26	48%	49%	9%
	Western	Q3 2024/25	88%	16%	3%
		Q4 2024/25	88%	16%	4%
		Q1 2025/26	87%	17%	4%
		Q2 2025/26	88%	15%	4%

4. TV Viewership Section

4.1. TV Viewer's Key Demographics

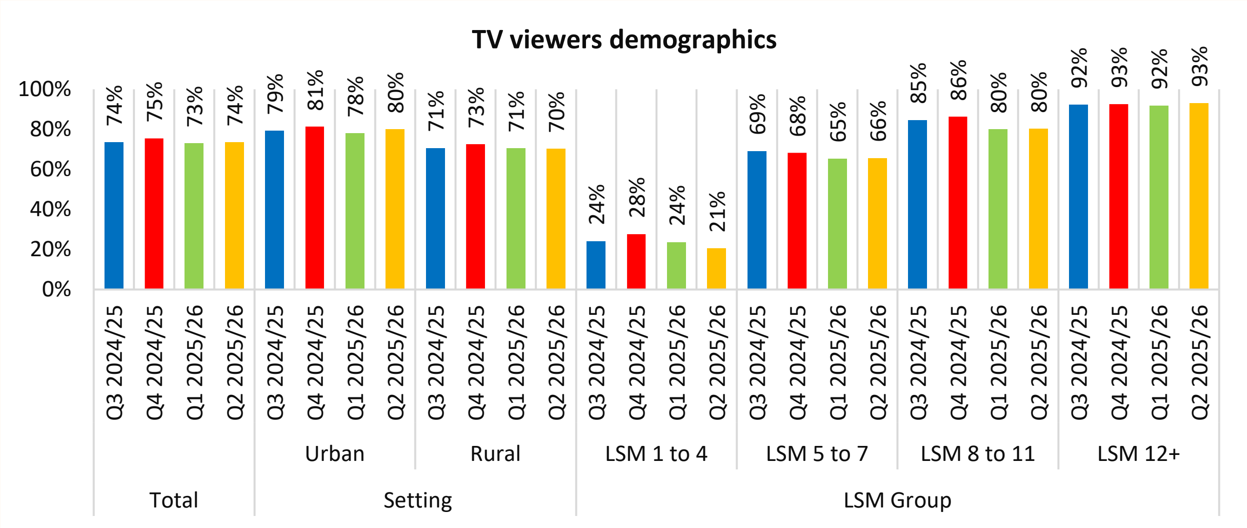
TV viewership is consistently higher among men than women across all four quarters. By age, the strongest engagement is seen among adults aged 35–44 years, while viewership declines noticeably among younger audiences aged 18–24 years.



N=32.23M: All Respondents

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

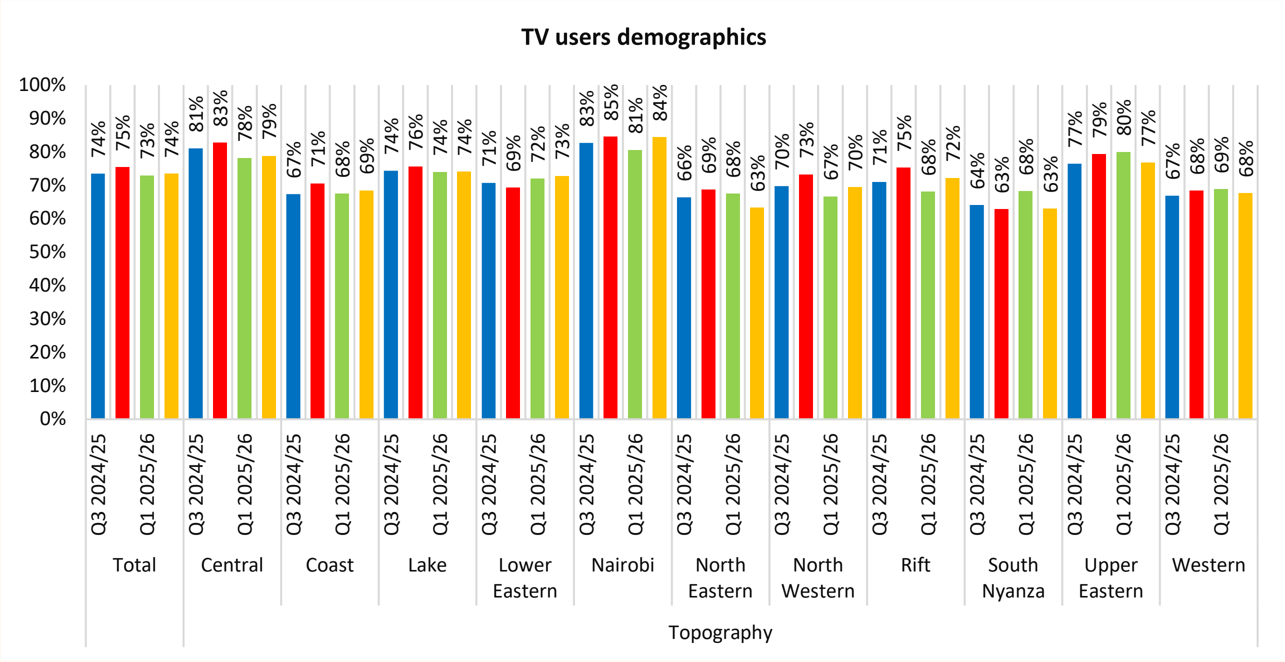
TV viewership is consistently higher in urban areas than in rural areas across all quarters. Differences are even more evident by socioeconomic status, with significantly lower viewership among LSM 1–4, likely due to limited access to television sets and electricity. In contrast, viewership is highest 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 Upper Eastern, which consistently record the highest levels of engagement. Central follows closely, though it shows a noticeable decline in the most recent quarter. In contrast, North Western registers the lowest TV viewership, highlighting clear regional disparities in television access and consumption. Other regions, including Central, Lower Eastern, and Lake, demonstrate moderate and relatively stable levels of TV engagement.



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. Sports also command a notable share, driven by live and major events, while movies, music, and educational content attract moderate audiences. Other genres such as religious programming, soap operas, talk shows, politics, and reality TV remain niche, indicating selective engagement. Overall, Kenyan audiences prioritize information and entertainment, with secondary genres adding diversity to viewing habits.

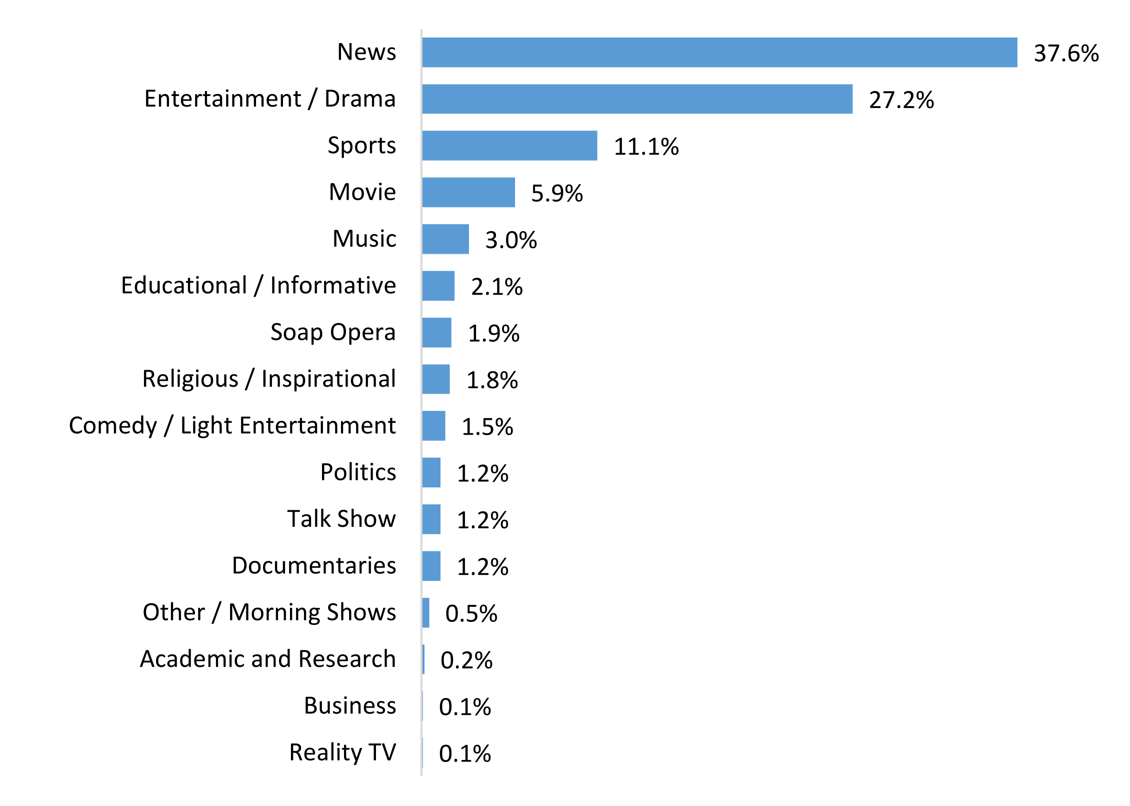
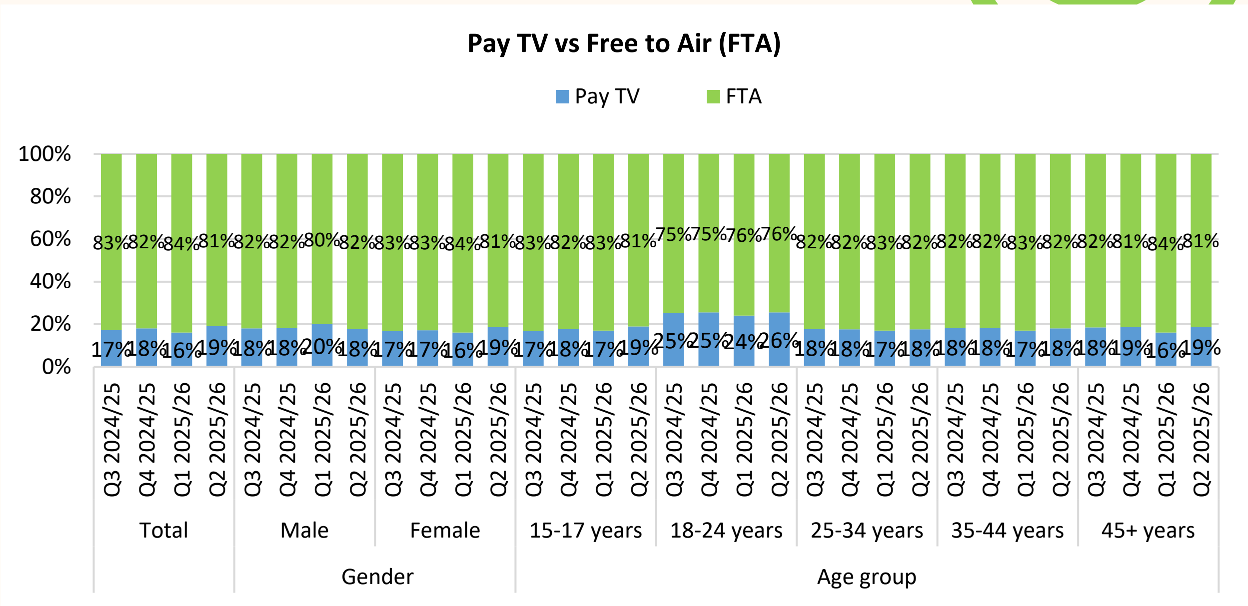


Figure 16: TV Genre Preference

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

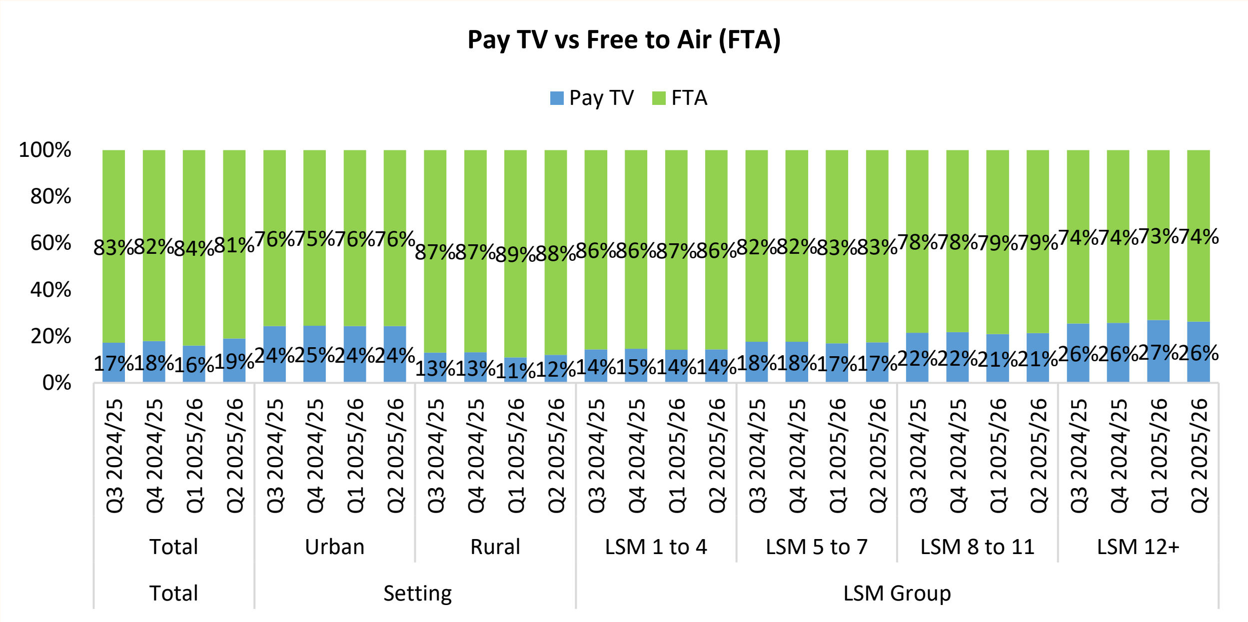
Free-to-air (FTA) television clearly dominates TV viewership in Kenya, attracting a much larger audience than Pay TV across the population. Viewing patterns show little difference between men and women, indicating broadly similar access and preferences by gender. However, Pay TV has relatively stronger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



n=24.3M: Average Daily TV Viewers

Figure 17:Pay TV vs Free to Air TV Reach – total, gender and age

Pay TV access in Kenya is more prevalent in urban areas and among higher-income households. Urban residents consistently report higher Pay TV reach compared to their rural counterparts. Similarly, individuals in the highest LSM group (LSM 12+) exhibit greater access to Pay TV than those in lower LSM categories. Despite this, Free-to-Air (FTA) TV maintains dominant reach across all settings and socio-economic groups.



n=24.3M: Average Daily TV Viewers

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

4.4. Exposure to impact of advertising

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

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

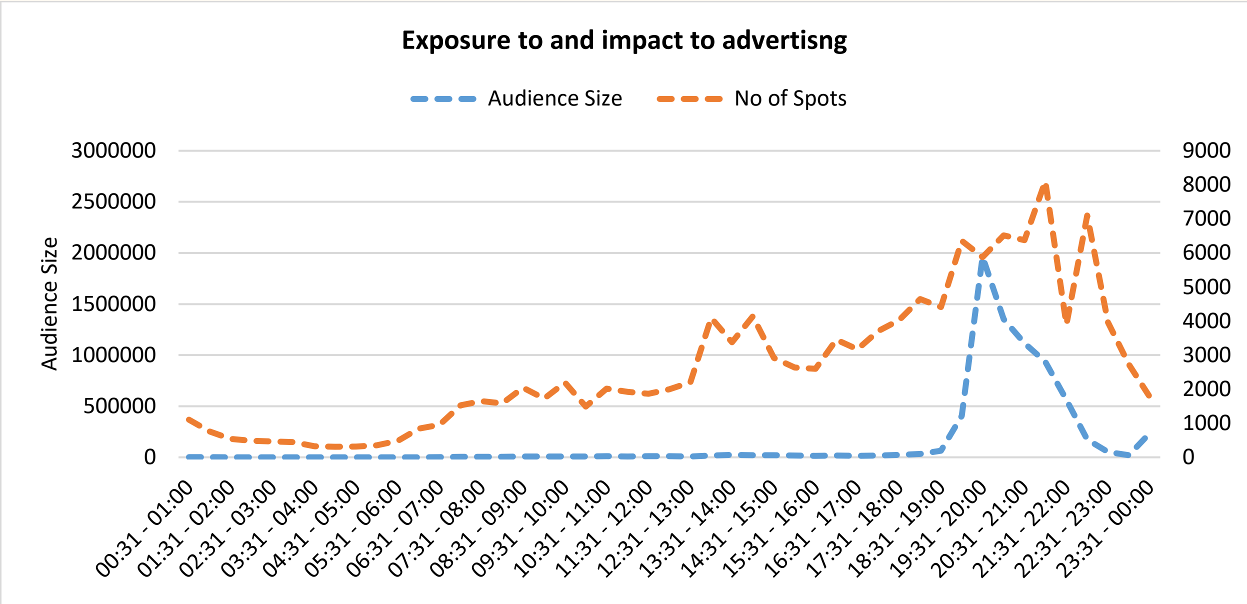
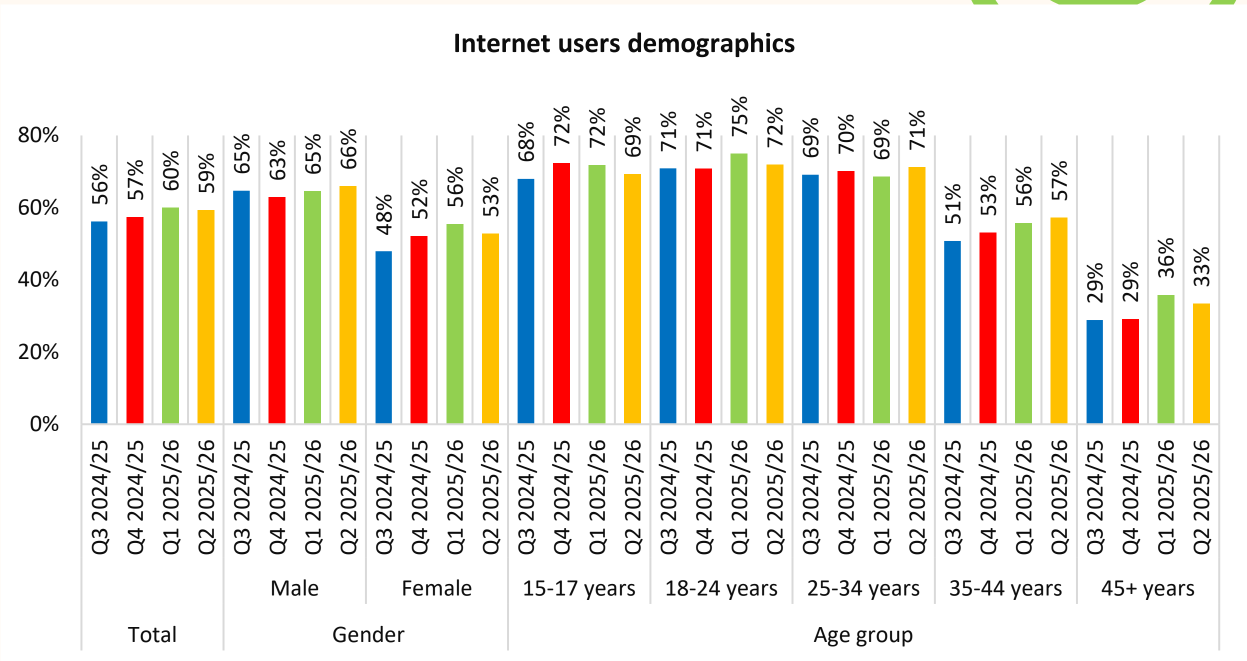


Figure 19: TV exposure to and impact to advertising

5. Internet Usage

5.1. Internet Access by Demographics

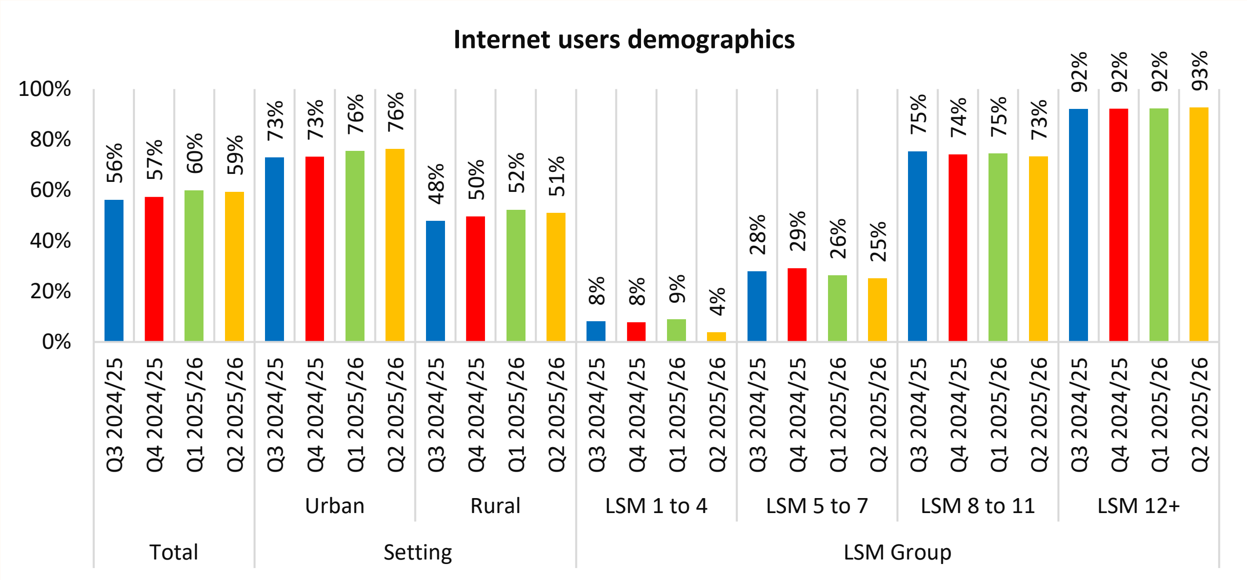
More than half of the people say they use the internet, with men consistently reporting higher usage than women in all quarters. Age also plays a key role in internet access: use is highest among young people aged 15–24 years, where more than 70% are online. Internet use then steadily decreases with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



n=19.0M: Average Internet Users

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

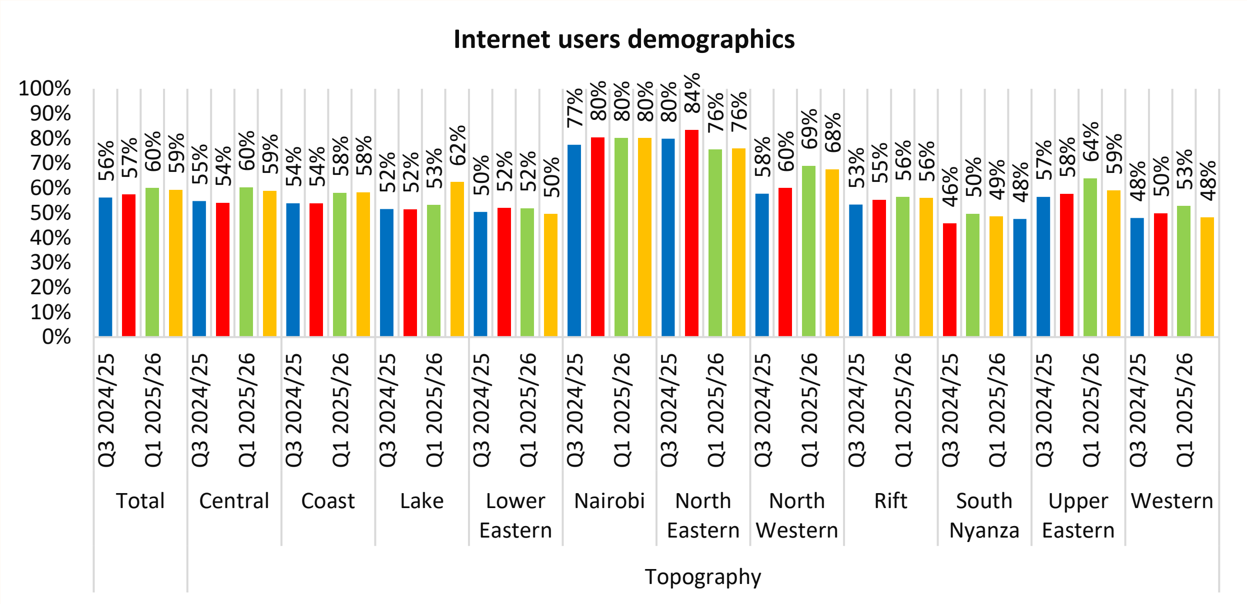
High internet access in Kenyan urban areas is largely due to strong digital infrastructure, including wide broadband coverage and reliable mobile networks. Urban residents also benefit from higher income levels and better access to digital devices, making it easier for them to adopt new technologies.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



n=19.0M: Average Internet Users

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

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



n=19.0M: Average Internet Users

Figure 22: Internet users' demographics – total and topography

5.2. Devices Used

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

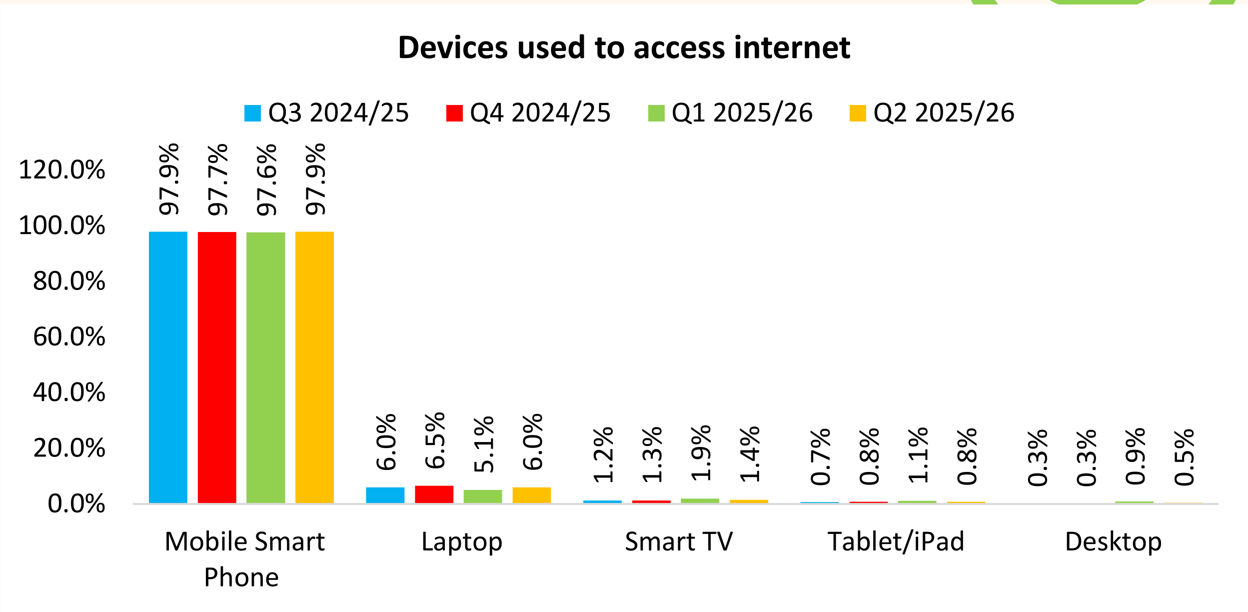


Figure 23:Devices used to access the internet

5.3. Social Media Platforms

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

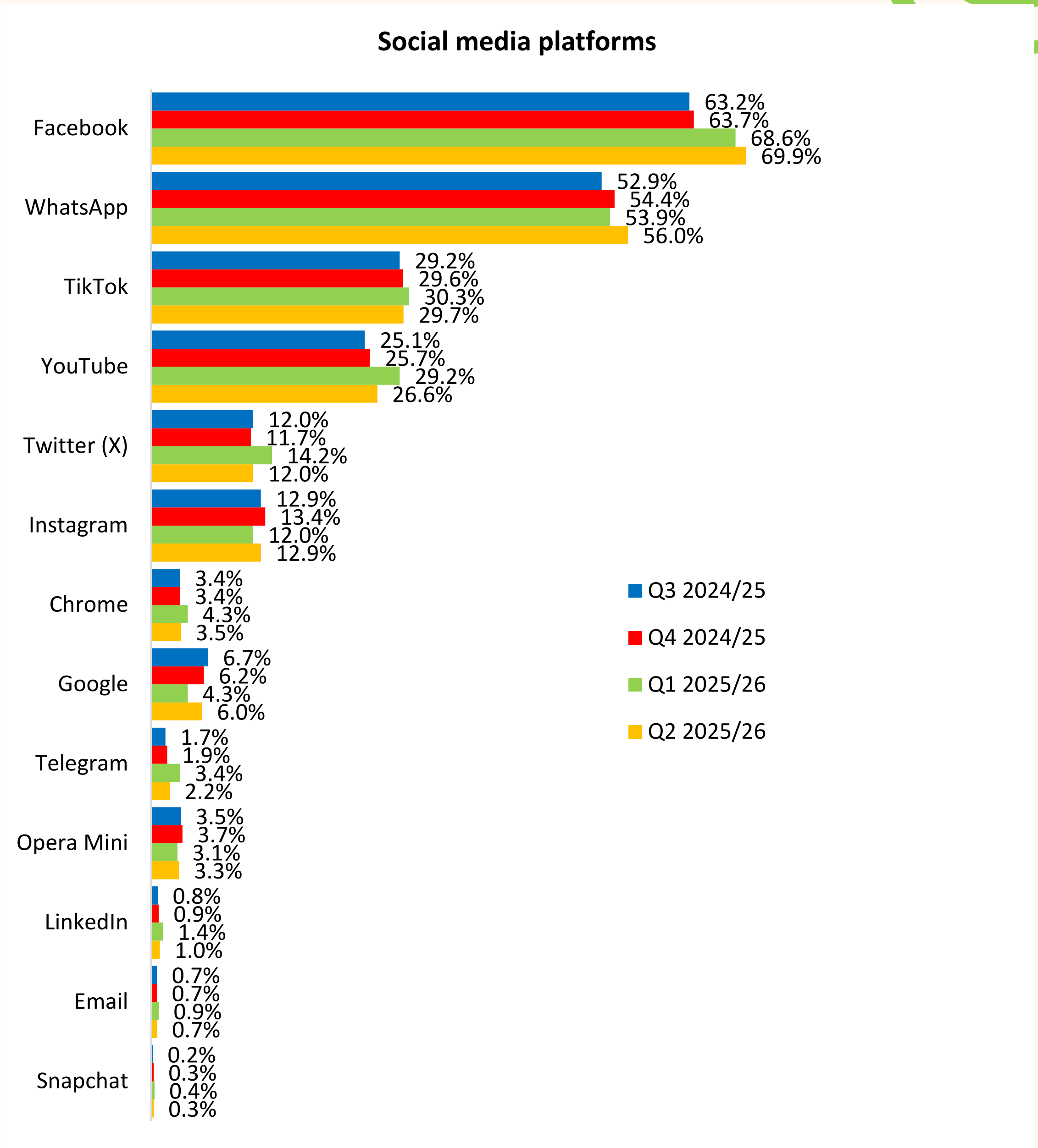


Figure 25: Popular social media platforms

6. Newspaper Readership

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

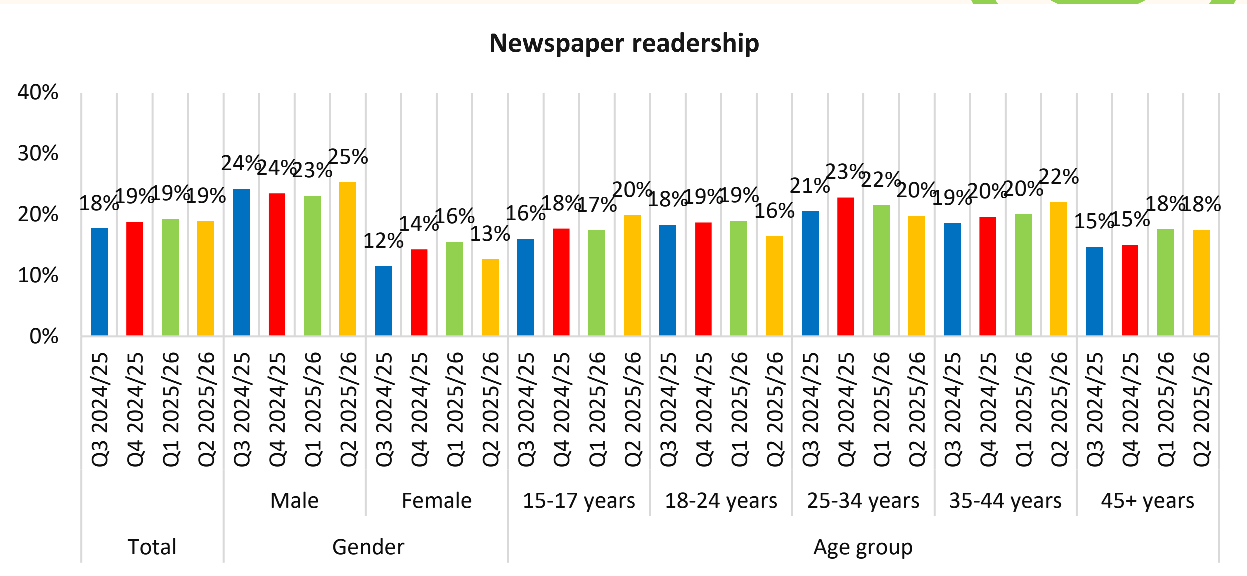
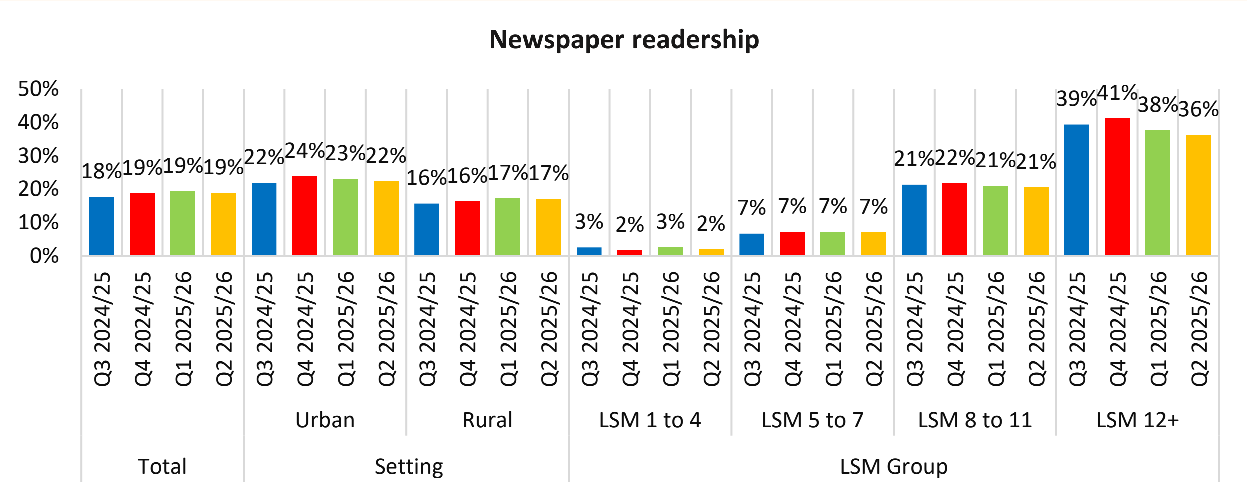


Figure 24: Newspaper readership demographics – by total, gender and age

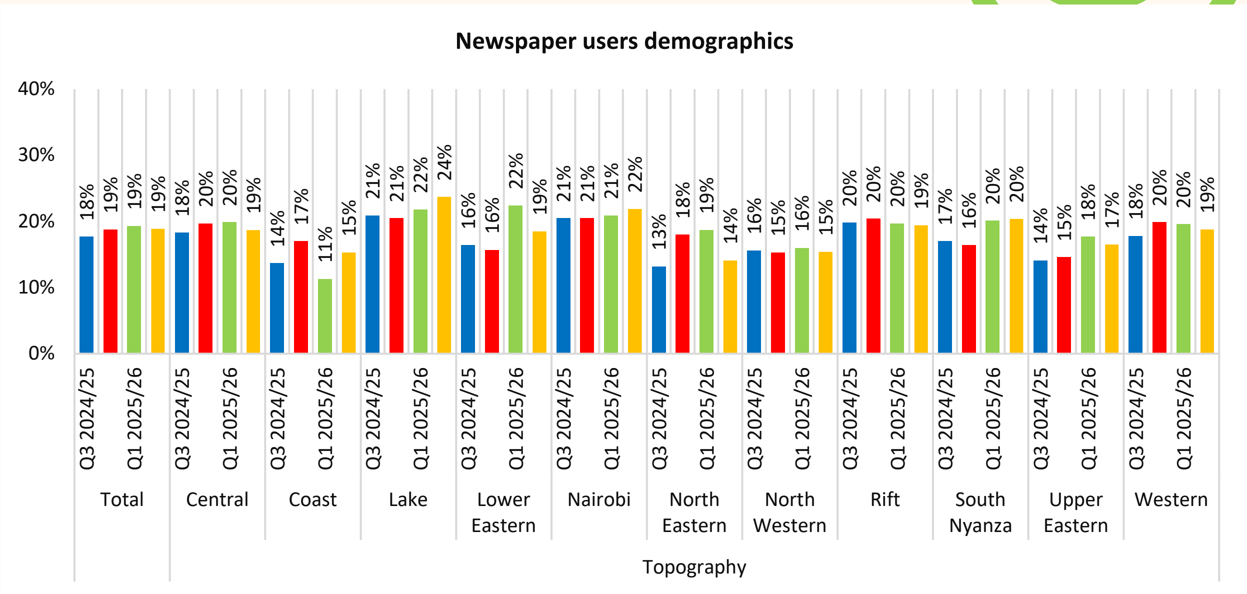
Newspaper readership in Kenya is significantly higher in urban areas compared to rural regions. Urban dwellers consistently show greater engagement with print media, reflecting better access to distribution channels and higher literacy levels.



n=32.2M: All Respondents

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

In Q2 2025/26, newspaper readership was highest in the Lake and Nairobi regions, at 22% and 21% respectively, showing steady engagement with print media in these areas. South Nyanza, which had declined from 17% in Q3 to 16% in Q4, recorded a modest improvement to 20% in Q2 2025/26, indicating a slight rebound in newspaper readership.



n=32.2M: All Respondents

Figure 26: Newspaper readership demographics – by total and topography

7. Advertising Expenditure

7.1. Advertising Expenditure Overview

Overall industry spending declined by 4% in Q2 2025/26, falling from KES 18 billion to KES 17 billion. The reduction in expenditure is largely attributed to lower advertising spend by several companies across different sectors during Q1 2025/26 (October–December 2025).

Table 7: Advertising Expenditure

Sectors	Q3 2024/25	Q4 2024/25	Q1 2025/26	Q2 2025/26	CHANGE (Q2-Q1)
Media	2,479	2,099	1,838	3,185	73%
Financial Services	2,069	2,320	2,634	2,709	3%
Communications	1,169	991	2,221	2,243	1%
Publishing & Education	718	698	1,373	1,433	4%
Foods	789	808	1,192	1,221	3%
Tourism & Entertainment	1,276	772	1,764	1,081	-39%
Transport	176	558	1,239	1,011	-18%
Personal Care	793	1,213	1,142	896	-22%
Property & Building & Acc.	850	850	1,215	875	-28%
Beverage	382	582	693	626	-10%
Retail	1,119	799	623	497	-20%
Corporate & Multi-brand	1,304	1,495	1,017	490	-52%
Household	322	256	344	364	6%
Pharmaceuticals	339	424	407	350	-14%
Veterinary & Agriculture	355	751	188	218	16%

Betting & Gaming	2,191	1,185	131	187	43%
Clothing, Fabrics & Footwear	45	97	56	138	146%
Office Equipment & Supplies	20	40	255	93	-63%
Total	**16,396**	**15,939**	**18,331**	**17,619**	**-4%**

Key: Figures in KES Millions (000,000)

TV has the greatest spending, with radio coming in second. On TV Media has highest spending while Financial Services on Radio. Publishing & Education have the highest spending in print.

Table 8: Advertising Expenditure for radio, TV & print

SECTOR	TV	Radio	Print	Total	Share of Spending (SOS)
Media	1,930	937	318	3,185	18.1%
Financial Services	1,215	1,368	126	2,709	15.4%
Communications	1,578	642	24	2,243	12.7%
Publishing & Education	489	468	476	1,433	8.1%
Foods	756	464	1	1,221	6.9%
Tourism & Entertainment	714	302	66	1,081	6.1%
Transport	401	583	27	1,011	5.7%
Personal Care	755	141	1	896	5.1%
Property & Building & Acc.	638	198	38	875	5.0%
Beverage	351	267	8	626	3.6%
Retail	270	211	15	497	2.8%
Corporate & Multibrand	218	259	13	490	2.8%
Household	247	108	10	364	2.1%
Pharmaceuticals	260	86	3	350	2.0%
Veterinary & Agriculture	32	186	-	218	1.2%
Betting & Gaming	137	49	1	187	1.1%
Clothing, Fabrics & Footwear	127	11	0	138	0.8%
Office Equipment & Supplies	58	31	4	93	0.5%
TOTAL AD SPENDS KSHS	**10,176**	**6,313**	**1,130**	**17,619**	**100.0%**

Key: Figures in KES Millions (000,000)

7.2. Year to Date Advertising Trends

While electronic media showed positive trends, media purchasing witnessed a drop by the beginning of January 2025 then a positive growth trend to 7% by end of March 2025 but a drop in June 2025. A growth is observed between October and December 2025 but a drop in September 2025.

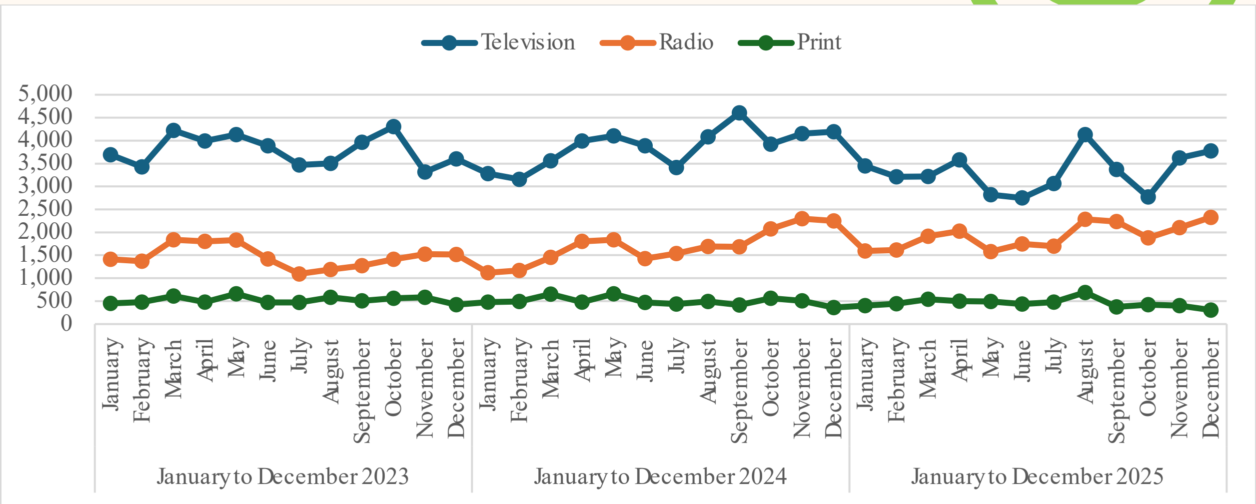


Figure 27: Advertising spends Jan 2023 to December 2025

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	-
Q1 2025/26	October	2,772	1
	November	3,624	1
	December	3,778	2

Key: Figures in KES Millions (000,000)

7.4. TV Spends by Sector/Industry

Television advertising spend varies notably by sector across the four quarters, with Media, Communications, and Financial Services emerging as the most consistent and influential advertisers. Communications and Financial Services show strong growth into Q1 and Q2 2025/26, reflecting renewed reliance on TV for broad reach, while Media rebounds sharply in Q2 after earlier declines.

Other sectors such as Tourism & Entertainment, Foods, and Personal Care display more cyclical, campaign-driven patterns, and Betting & Gaming declines significantly after Q3 2024/25. Overall, the chart highlights television's continued appeal across diverse industries, shaped by seasonality and shifting advertising priorities.

Table 10: TV spends by sector/industry

Sector/ Industry	Q3 2024/25	Q4 2024/25	Q1 2025/26	Q2 2025/26
Media	1,552	1,193	1,057	1,930
Communications	820	709	1,559	1,578
Financial Services	864	988	1,204	1,215
Foods	580	495	781	756
Personal Care	718	1,082	983	755
Tourism & Entertainment	936	629	1,211	714
Property & Building & Acc.	702	631	950	638
Publishing & Education	490	432	714	489
Transport	74	207	495	401
Beverage	155	145	201	351
Retail	609	567	347	270
Pharmaceuticals	289	287	222	260
Household	224	155	222	247
Corporate & Multibrand	496	409	280	218
Betting & Gaming	1,302	796	80	137
Clothing, Fabrics & Footwear	20	43	53	127
Office Equipment & Supplies	4	13	131	58
Veterinary & Agriculture	48	370	76	32

Key: Figures in KES Millions (000,000)

7.5. Radio Spends by Sector/Industry

Financial Services has the highest advertising spend on radio followed by Media and Communication in Q2 2025/26.

Table 11: Radio spends by sector/industry

Sector	Q3 2024/25	Q4 2024/25	Q1 2025/26	Q2 2025/26
Financial Services	1014	1134	1289	1368
Media	564	499	410	937
Communications	303	375	654	642
Transport	43	125	727	583

Publishing & Education	122	200	430	468
Foods	348	279	409	464
Tourism & Entertainment	490	226	428	302
Beverage	208	307	487	267
Corporate & Multibrand	887	330	317	259
Retail	222	436	104	211
Property & Building & Acc.	177	180	242	198
Veterinary & Agriculture	75	333	106	186
Personal Care	190	122	159	141
Household	73	131	115	108
Pharmaceuticals	92	93	167	86
Betting & Gaming	284	513	51	49
Office Equipment's & Supplies	8	23	123	31
Clothing, Fabrics & Footwear	23	54	3	11

Key: Figures in KES Millions (000,000)

7.6. Print Spends by Sector/Industry

The highest spends distribution is on media and corporate & multi-brand Q1 2025/26.

Table 12: Print spends by sector/industry

SECTOR	Q3 2024/25	Q4 2024/25	Q1 2025/26	Q2 2025/26
Publishing & Education	51	86	25	202
Media	363	407	178	104
Financial Services	192	198	28	33
Property & Building & Acc.	26	19	6	31
Tourism & Entertainment	151	21	37	27
Transport	27	18	3	7
Corporate & Multibrand	524	574	167	3
Communications	1	3	6	3
Beverage	4	1	1	3
Retail	20	5	3	3
Household	6	8	5	2
Betting & Gaming	1	60		1
Office Equipment & Supplies	7	3	1	1
Pharmaceuticals	7	12	16	1
Foods	1	6	0	0
Clothing, Fabrics & Footwear	1	0	0	0
Veterinary & Agriculture	5	5	3	0

Key: Figures in KES Millions (000,000)

7.7. Overall Digital Spends Trends

In Q1 2025/26, an estimated KES 11.76 billion was spent on digital advertising, highlighting a continued shift by Kenyan brands toward digital platforms. Spending increased steadily from July through September, with September emerging as the peak month, driven largely by strong investment from the Banking and Finance sector. This upward trend underscores growing confidence in digital channels as effective tools for reach, targeting, and engagement, before spending tapered off in Q2 2025/26.

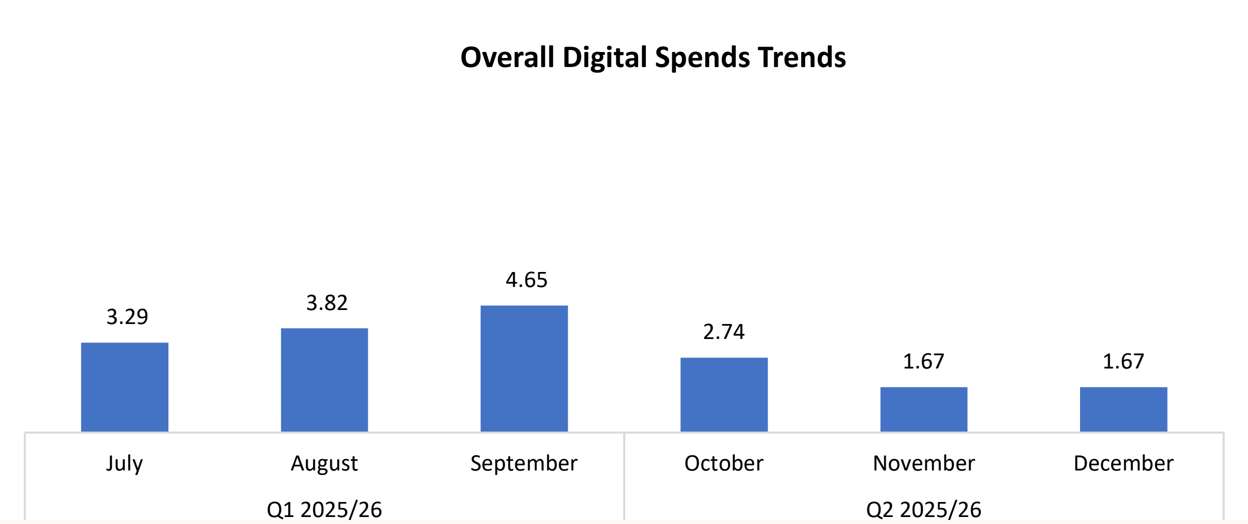


Figure 28: Overall Digital Spends Trends

7.8. Top Digital Channels

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

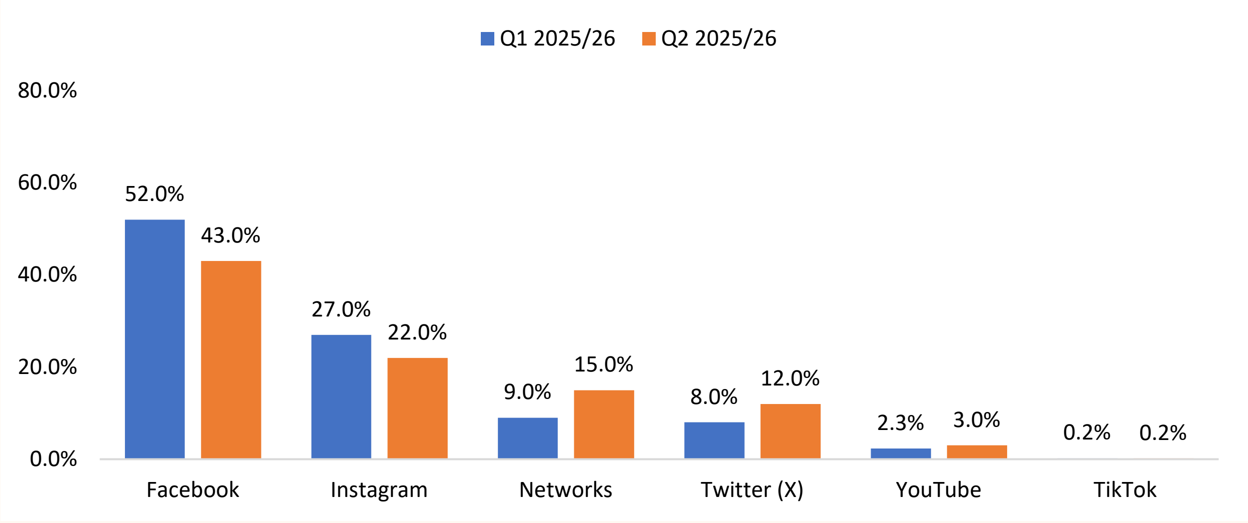


Figure 29: Top Digital Channels

8. CHALLENGES AND OPPORTUNITIES FOR THE BROADCASTING INDUSTRY IN KENYA

Challenges in the Broadcasting Industry in Kenya

❖ Over-Concentration on a Narrow Range of Content Genres

- Audience engagement remains heavily centered on news and general entertainment programming.
- Limited investment in children's, educational, documentary, and lifestyle content restricts audience diversification.
- Over-reliance on a few dominant genres reduces content innovation and long-term audience growth.
- Broadcasters face constrained advertising opportunities from niche and socially aligned sectors due to limited genre variety.

❖ Stagnation of Print and Weak Cross-Platform Integration

- Print media consumption remains consistently low, limiting its role within integrated multimedia strategies.
- Weak linkages between print, broadcast, and digital platforms reduce opportunities for content repurposing and cross-promotion.
- Broadcasters and publishers miss out on bundled advertising packages that could enhance overall campaign value.

❖ Regional Imbalances in Media Reach and Engagement

- Media consumption levels vary significantly across regions and topographies.
- Uneven regional performance undermines national coverage consistency for broadcasters.
- Advertisers targeting nationwide campaigns face challenges achieving balanced geographic reach.

❖ Heavy Reliance on Prime-Time Viewing and Listening

- Audience engagement is highly concentrated in morning and evening peak periods.
- Mid-day and late-night programming attracts substantially lower audiences. This concentration leads to inefficient use of broadcast schedules.
- Revenue generation outside prime time remains limited, constraining overall commercial performance.

❖ Persistent Access Gaps Among Lower Socioeconomic Groups

- Lower socioeconomic audiences experience irregular media access due to electricity constraints, device ownership limitations, and signal quality issues.
- These access gaps reduce inclusive reach and limit equitable information dissemination.
- Broadcasters face challenges extending consistent service coverage to underserved populations.

Opportunities in the Broadcasting Industry in Kenya

❖ Sustained Strength of Free-to-Air Broadcasting

- Free-to-Air television and radio continue to deliver the widest national reach and the platforms remain central to mass communication, public information, and national discourse.
- Broadcasters can leverage FTA dominance to maintain relevance across all demographic segments and advertisers continue to view FTA platforms as the most effective channels for scale and frequency.

❖ Optimization of Prime-Time and Peak Listening Slots

- Morning and evening peak periods attract the highest audience concentrations and it present opportunities for flagship programs and premium content investment.
- Broadcasters can develop differentiated prime-time formats to strengthen audience loyalty while the premium advertising packages can be structured around high-performing time bands.

❖ Development of Children's and Educational Content

- Broadcasters can introduce high-quality, age-appropriate, and curriculum-aligned content.
- Such programming appeals to families, schools, and socially responsible advertisers.
- Opportunities exist for partnerships with public institutions and development organizations.

❖ Leveraging Communal Viewing and Listening Environments

- Social venues provide captive audiences for live and event-driven content.
- Sports, entertainment, and live broadcasts are well-suited to communal consumption.
- Broadcasters can design location-specific advertising and sponsorship models.
- Partnerships with hospitality and entertainment venues can enhance audience reach and revenue.

❖ Sector-Driven Advertising Partnerships

- Consistent advertising participation from banking, telecommunications, FMCG, and property sectors remains strong and these sectors offer opportunities for long-term sponsorships and branded programming.
- Broadcasters can align content formats to sector-specific communication needs.
- Integrated campaigns can support more stable and predictable revenue streams.

❖ Data-Led Programming and Scheduling Decisions

- Granular audience data enables evidence-based content development and scheduling.
- Broadcasters can optimize underperforming time slots using targeted content strategies.
- Data-driven decisions improve efficiency and reduce programming risk.