



## AUDIENCE MEASUREMENT AND INDUSTRY TRENDS REPORT

**THIRD QUARTER FY 2023-2024  
(January – March 2024)**

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## **1. INTRODUCTION**

The Communications Authority of Kenya (CA) is the regulatory agency for the ICT industry in Kenya with responsibilities in telecommunications, e-commerce, cyber security, broadcasting and postal/courier services. The CA is also responsible for managing the country's numbering and frequency spectrum resources, administering the Universal Service Fund (USF) as well as protecting interests of users of ICT services.

The Authority is vested with the responsibility of promoting and facilitating the development of the broadcasting industry in Kenya

Kenya boasts of a media landscape renowned for its diversity and sophistication. The radio sector is thriving, with an impressive array of over 300 radio stations, many of which cater to a variety of local languages.

The transition to digital terrestrial television transmission in 2015 significantly expanded the television station count. Additionally, Kenya's remarkable proliferation of mobile phones has contributed to one of the highest internet penetration rates in Africa. However, the dynamism of Kenya's media scene poses challenges in capturing and retaining broad audience engagement within a fiercely competitive market.

In such a vibrant and rapidly evolving media landscape as Kenya's, the need for research becomes increasingly evident. Research is a vital tool for media organizations, policymakers, and stakeholders to navigate the intricate dynamics of this sector.

It enables us to gain a deeper understanding of audience preferences, emerging trends, and the impact of various media platforms. Through comprehensive research, we can identify untapped opportunities, assess the effectiveness of content strategies, and refine our approaches for audience engagement.

Moreover, research provides critical insights into the ever-changing technological landscape, helping media entities adapt to new communication channels and digital advancements. In a competitive market, where staying relevant is paramount, investing in research is not just advantageous but a strategic imperative to ensure the sustainability and growth of the media industry in Kenya.

## 2. MEDIA AUDIENCE MEASUREMENT

### 2.1. Ways in Which Media is Consumed

Over the course of the three quarters, patterns of consumption stayed steady. Mobile phones account for about one-third of radio listenership, yet traditional radio sets still dominate as the main method for engaging with radio. Television is primarily watched on TV sets. Social media access predominantly happens through mobile phones and remains a significant part of media consumption. Taken together, these findings underscore the variety and interconnectedness of how people use different media channels in today's world.

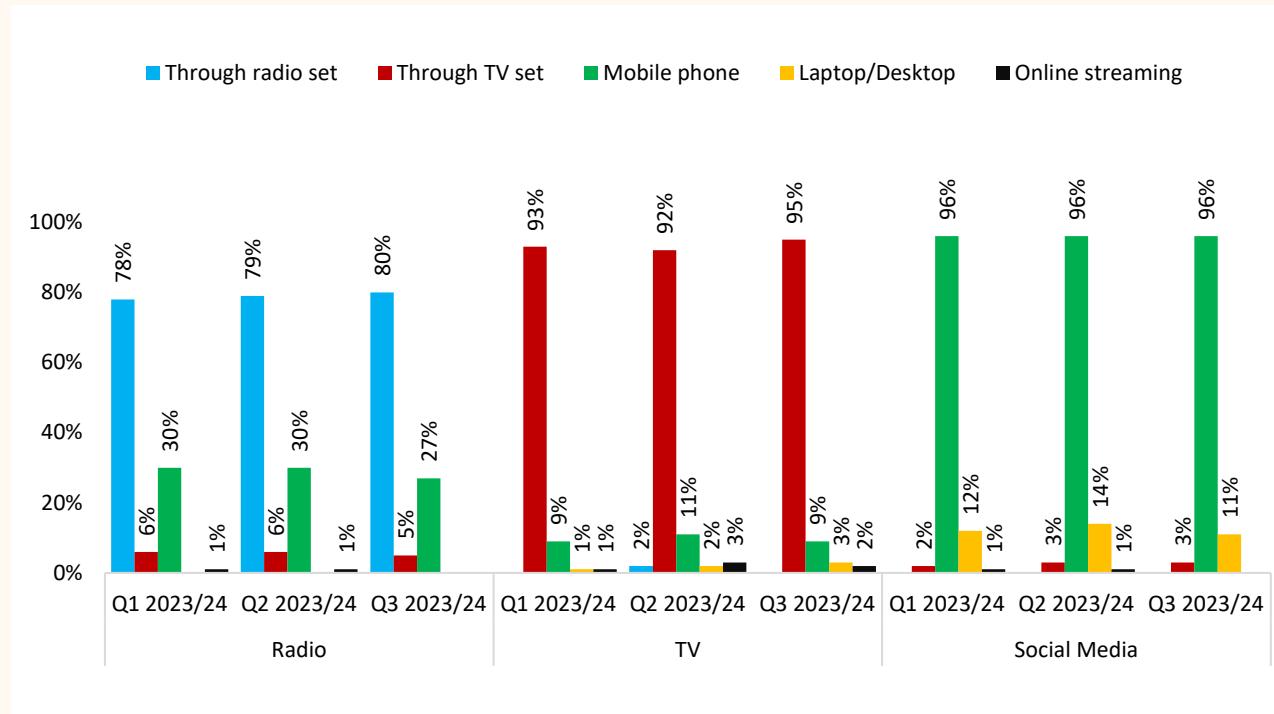


Figure 1: Ways in which media is consumed by total

## 2.2. Place of Media Consumption

From Q1 2023/24 to Q3 2023/24, 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 favours radio. In social settings like bars, restaurants, and hotels, television content is more popular.

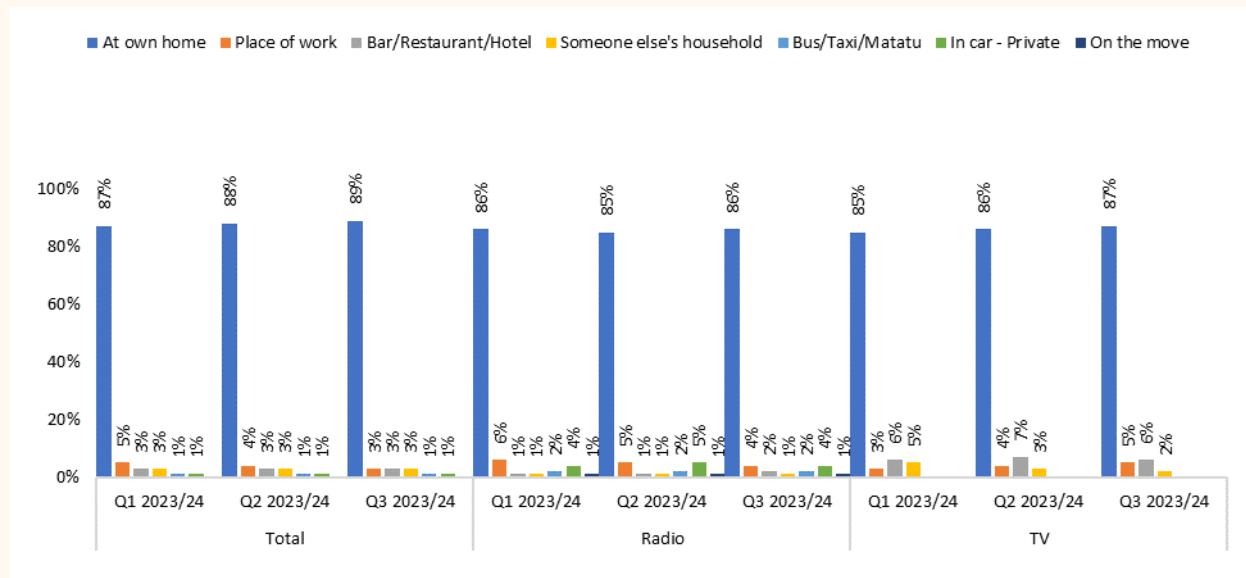


Figure 2: Place of media consumption by total

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

A review of the past one-week media consumption shows that more than 70% of respondents mentioned watching TV and listening to the radio as their most popular pastimes. While television and the internet saw no change in engagement, the current quarter's data indicates a modest dip for radio. During this time, there was a little reduction in magazine reading and a slight increase in newspaper reading.

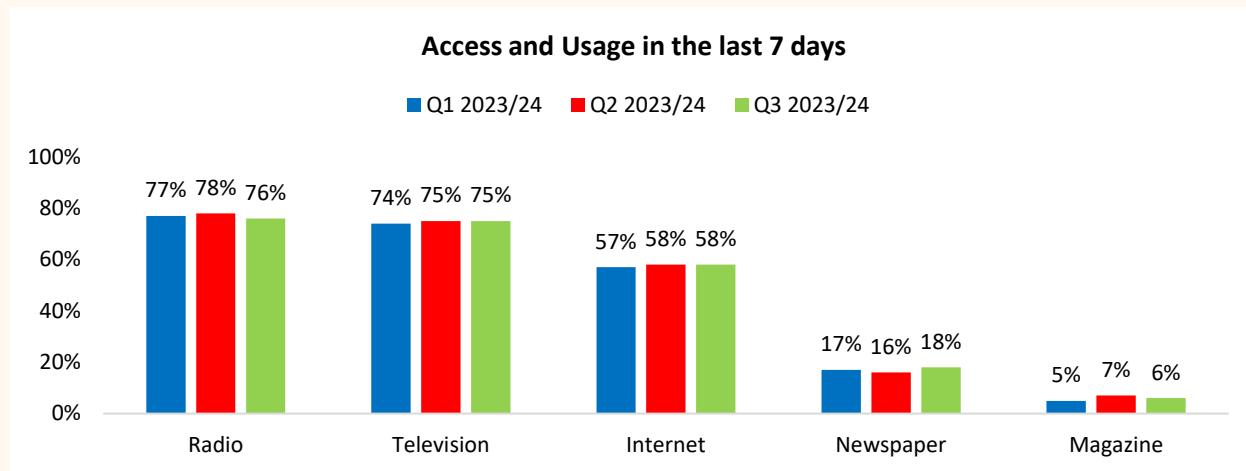


Figure 3: Access and Usage of media by total

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

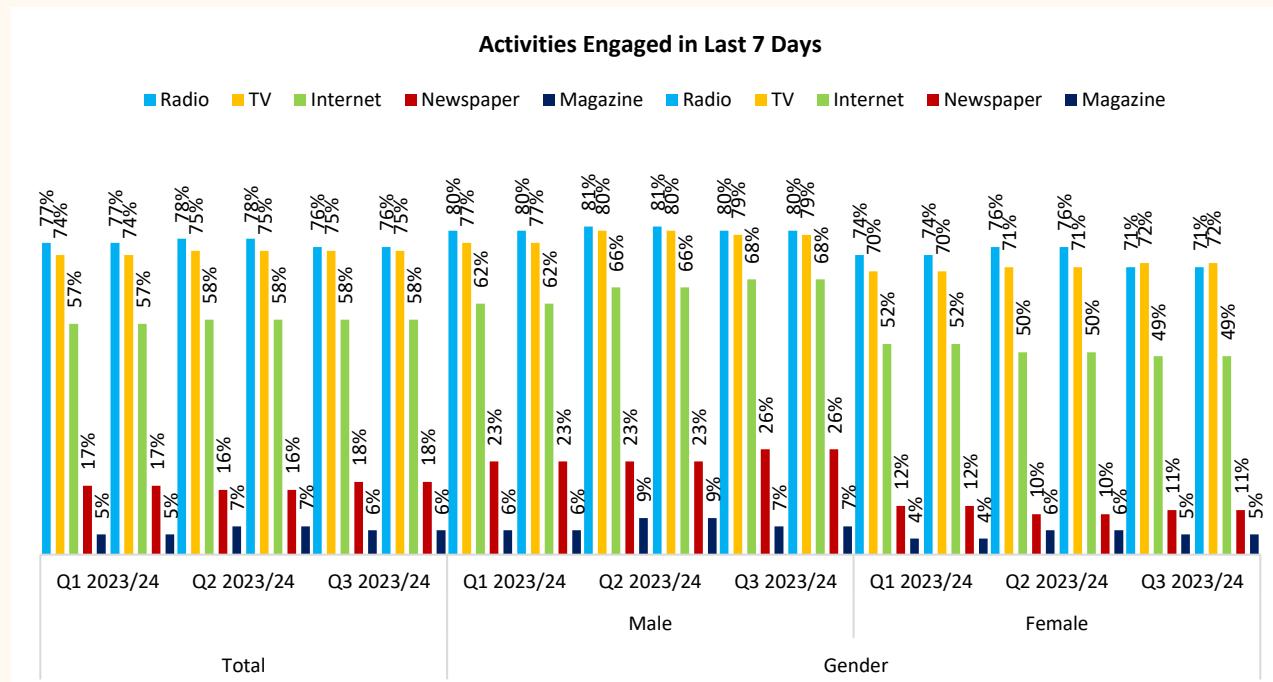


Figure 4: Activities Engaged in Last 7 Days - by total & gender

In rural regions, radio enjoys greater popularity, whereas urban areas display a stronger inclination towards television. Radio's widespread popularity in rural Kenya is due to its accessibility, affordability, relevance to local cultures and languages, and its ability to foster community cohesion and engagement.

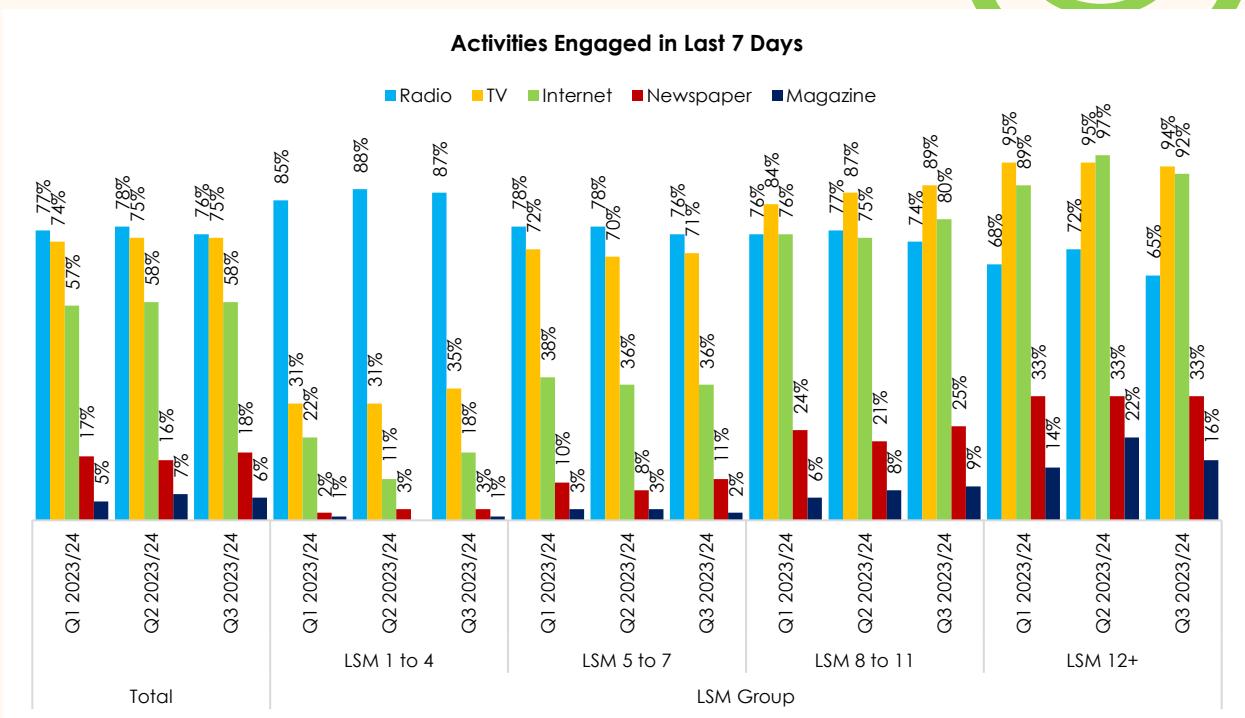


Figure 5: Activities Engaged in Last 7 Days - by total, setting & LSM

The regions with the largest radio listenership include the Lower Eastern (83%), Lake (83%), Western (82%), and Rift (82%). While internet usage is most prevalent in Nairobi, with 81% of people using it, Nairobi regions show noticeably high television consumption (81%) also. There are geographical differences in newspaper reading, with the Lake and South Nyanza regions showing notable increase 11% and 8%, respectively)

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%
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%
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%
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%
Lower Eastern	Q1 2023/24	78%	70%	49%	14%	3%

	<b>Q2 2023/24</b>	<b>85%</b>	<b>80%</b>	<b>43%</b>	<b>16%</b>	<b>5%</b>
	<b>Q3 2023/27</b>	<b>83%</b>	<b>73%</b>	<b>45%</b>	<b>16%</b>	<b>6%</b>
Nairobi	<b>Q1 2023/24</b>	<b>64%</b>	<b>80%</b>	<b>75%</b>	<b>23%</b>	<b>7%</b>
	<b>Q2 2023/24</b>	<b>69%</b>	<b>81%</b>	<b>83%</b>	<b>21%</b>	<b>8%</b>
	<b>Q3 2023/28</b>	<b>65%</b>	<b>81%</b>	<b>81%</b>	<b>22%</b>	<b>8%</b>
North Eastern	<b>Q1 2023/24</b>	<b>54%</b>	<b>53%</b>	<b>64%</b>	<b>17%</b>	<b>3%</b>
	<b>Q2 2023/24</b>	<b>62%</b>	<b>46%</b>	<b>70%</b>	<b>18%</b>	<b>2%</b>
	<b>Q3 2023/29</b>	<b>56%</b>	<b>51%</b>	<b>65%</b>	<b>13%</b>	<b>4%</b>
North Western	<b>Q1 2023/24</b>	<b>68%</b>	<b>58%</b>	<b>56%</b>	<b>10%</b>	<b>0%</b>
	<b>Q2 2023/24</b>	<b>74%</b>	<b>70%</b>	<b>62%</b>	<b>11%</b>	<b>3%</b>
	<b>Q3 2023/30</b>	<b>74%</b>	<b>69%</b>	<b>57%</b>	<b>11%</b>	<b>1%</b>
Rift	<b>Q1 2023/24</b>	<b>83%</b>	<b>74%</b>	<b>63%</b>	<b>18%</b>	<b>5%</b>
	<b>Q2 2023/24</b>	<b>82%</b>	<b>71%</b>	<b>62%</b>	<b>20%</b>	<b>11%</b>
	<b>Q3 2023/31</b>	<b>82%</b>	<b>80%</b>	<b>63%</b>	<b>22%</b>	<b>10%</b>
South Nyanza	<b>Q1 2023/24</b>	<b>85%</b>	<b>62%</b>	<b>44%</b>	<b>12%</b>	<b>2%</b>
	<b>Q2 2023/24</b>	<b>78%</b>	<b>57%</b>	<b>41%</b>	<b>7%</b>	<b>5%</b>
	<b>Q3 2023/32</b>	<b>76%</b>	<b>70%</b>	<b>43%</b>	<b>15%</b>	<b>8%</b>
Upper Eastern	<b>Q1 2023/24</b>	<b>77%</b>	<b>87%</b>	<b>49%</b>	<b>15%</b>	<b>4%</b>
	<b>Q2 2023/24</b>	<b>71%</b>	<b>71%</b>	<b>47%</b>	<b>17%</b>	<b>9%</b>
	<b>Q3 2023/33</b>	<b>79%</b>	<b>79%</b>	<b>54%</b>	<b>18%</b>	<b>7%</b>
Western	<b>Q1 2023/24</b>	<b>82%</b>	<b>70%</b>	<b>52%</b>	<b>22%</b>	<b>8%</b>
	<b>Q2 2023/24</b>	<b>85%</b>	<b>74%</b>	<b>57%</b>	<b>17%</b>	<b>6%</b>
	<b>Q3 2023/34</b>	<b>82%</b>	<b>71%</b>	<b>52%</b>	<b>17%</b>	<b>7%</b>

#### 2.4. Number of Media Consumed

The data trend shows that during Q3 2023–2024, there was a minor increase in the consumption of multiple media. The percentage of participants utilizing various media platforms increased by 0.7% in Q3 2023/24. The continued slight increase in multimedia consumption during Q3 2023/24 suggests a continued trend towards a more interconnected media landscape. With a 0.7% rise in respondents engaging with multiple media platforms, it indicates a growing appetite for diverse content across various channels.

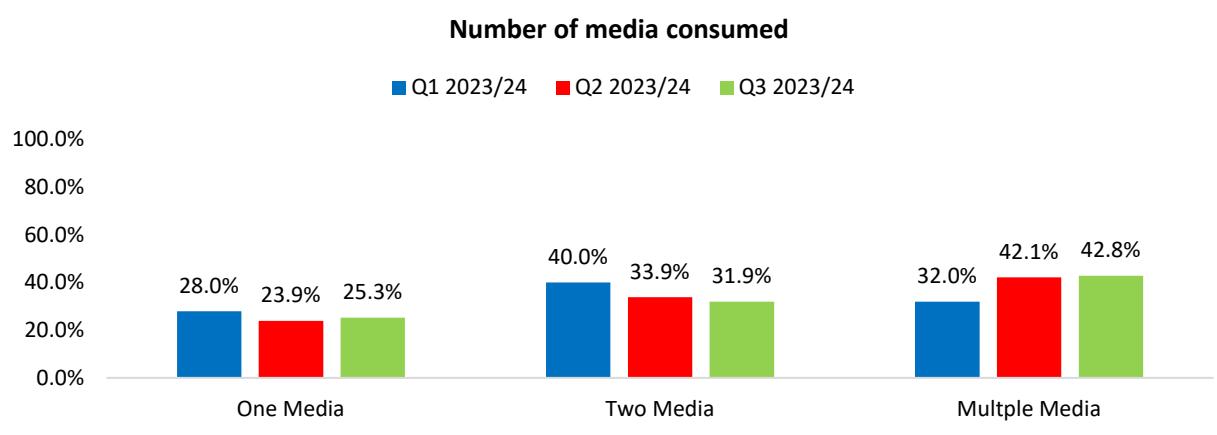


Figure 6: Number of media consumed by total

## 2.5. Type of Media Consumed

Across the three quarters, the prevailing trend in media consumption has been identified as the blending of multiple platforms, including Radio, Television, and Online mediums. This integrated consumption pattern accounted for 24% of total media consumption during the third quarter of the fiscal year 2023/24. This observation suggests that a significant segment of the population is concurrently engaging with various forms of media, encompassing radio broadcasts, television programming, and the numerous content available online.

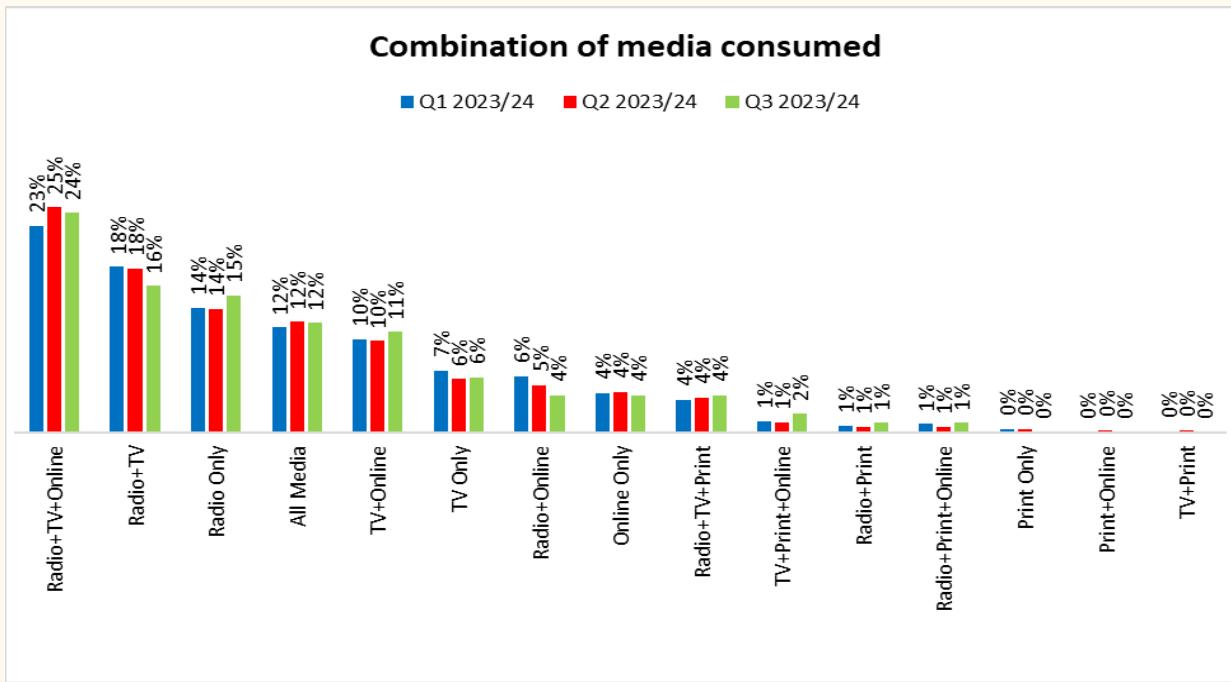


Figure 7: Type of media Consumed by total

## 2.6. Frequency of Media Consumption

The media consumption patterns observed in Q1 2023/24 and Q2 2023/24 indicate a consistent daily engagement for TV (57% in both quarters) and radio (58% in Q1 2023/24 and 57% in Q2 2023/24), with a little reduction to 52% in Q3 2023/24 for both TV and radio. From Q2 2023/24 to Q3 2023/24, there were moderate increases in daily participation on social media and online video streaming, with 46% to 47% on social media and 22% to 24% on online video streaming.

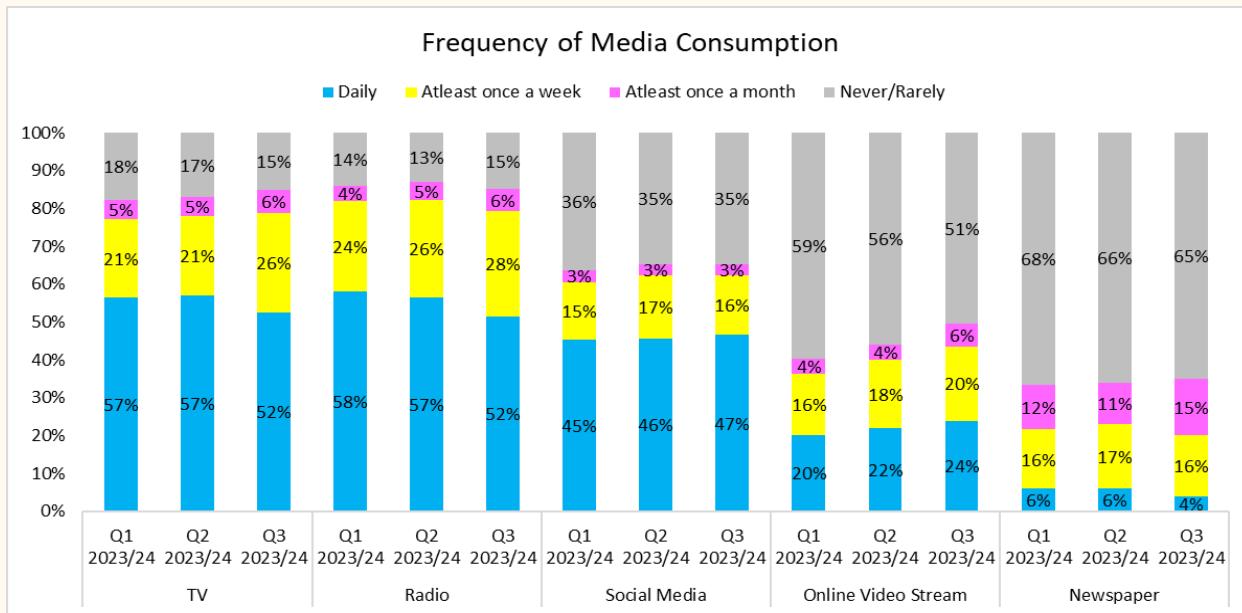


Figure 8: Frequency of consuming Tv, radio, social media, online streams and newspapers

## 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%
	Female	Q1 2023/24	49%	48%	35%	46%
		Q2 2023/24	49%	48%	31%	44%
		Q3 2023/24	48%	48%	30%	43%
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%

			22%	23%	24%	30%
	18-24 years	Q1 2023/24	22%	23%	24%	30%
		Q2 2023/24	22%	24%	24%	29%
		Q3 2023/24	21%	24%	23%	31%
	25-34 years	Q1 2023/24	26%	28%	28%	32%
		Q2 2023/24	26%	28%	30%	31%
		Q3 2023/24	26%	27%	28%	30%
	35-44 years	Q1 2023/24	20%	20%	17%	16%
		Q2 2023/24	21%	19%	20%	15%
		Q3 2023/24	20%	19%	19%	15%
	45+ years	Q1 2023/24	20%	19%	17%	10%
		Q2 2023/24	20%	19%	17%	11%
		Q3 2023/24	20%	18%	18%	10%
Setting	Urban	Q1 2023/24	28%	36%	42%	42%
		Q2 2023/24	30%	36%	44%	43%
		Q3 2023/24	29%	36%	38%	43%
	Rural	Q1 2023/24	72%	64%	58%	58%
		Q2 2023/24	70%	64%	57%	57%
		Q3 2023/24	71%	64%	62%	57%
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%
	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%
	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%
	LSM 12+	Q1 2023/24	11%	16%	23%	19%
		Q2 2023/24	13%	18%	29%	24%
		Q3 2023/24	10%	15%	21%	18%

### 3. Radio Listenership Section

#### 3.1. Radio Listeners' Key Demographics

Among the demographic groups, males tend to have a greater affinity for radio consumption in comparison to females. Moreover, this inclination is particularly noticeable among older individuals. Furthermore, the listenership of radio demonstrates a consistent upward trend as age increases.

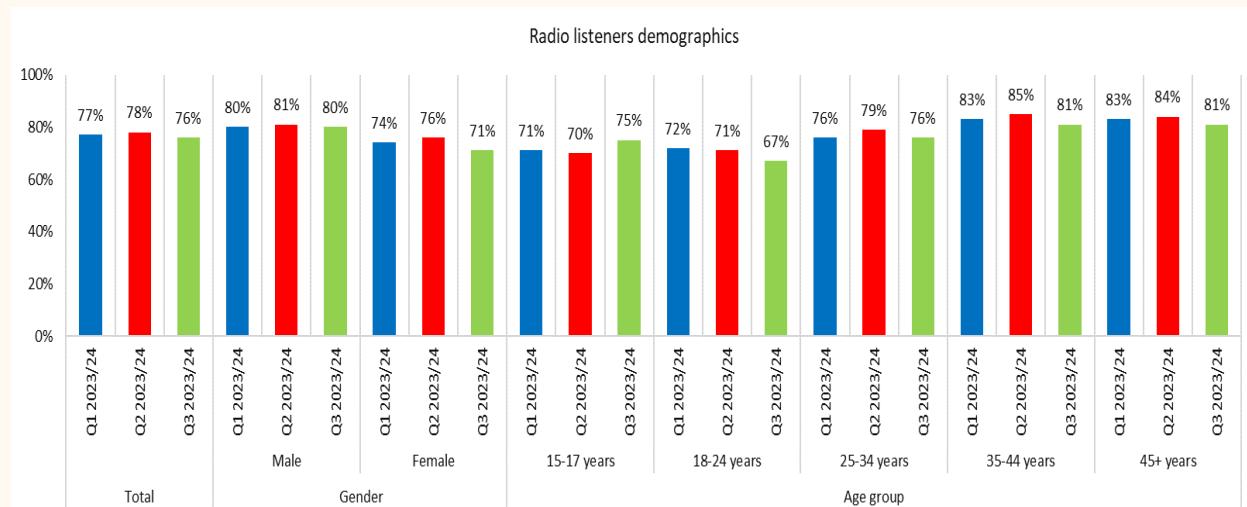


Figure 9: Demographics of radio consumers – by total, gender

The rural areas experience a greater listenership than urban areas whilst the lower LSMs exhibit the highest radio consumption as compared to the higher ones.

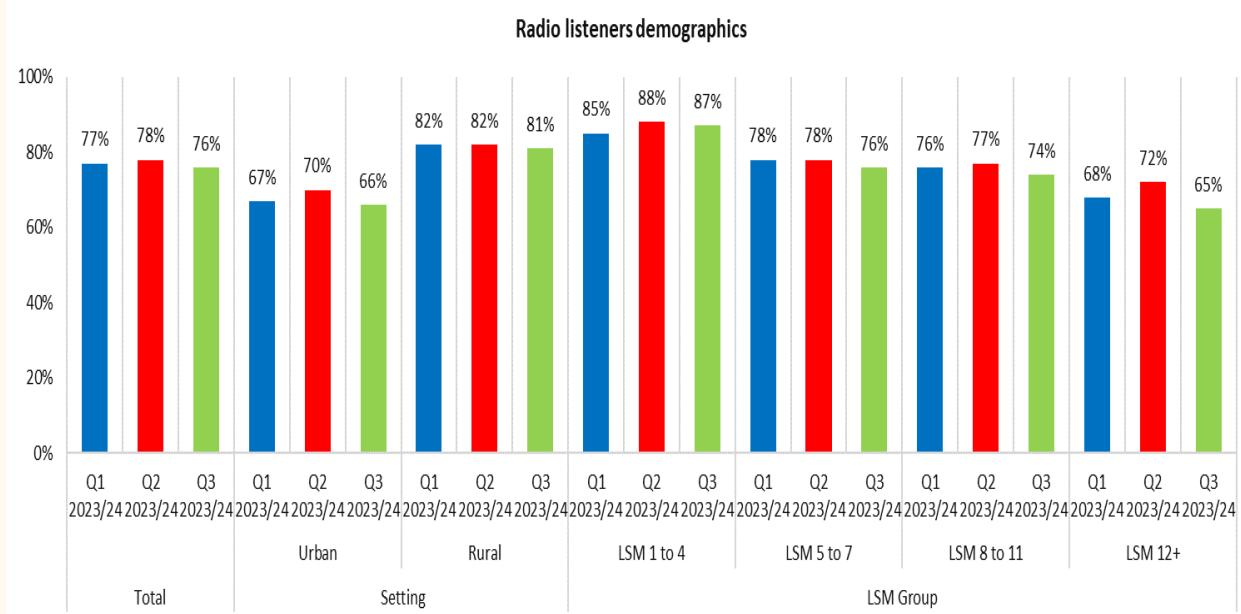


Figure 10: Demographics of radio consumers – by total, setting and LSM

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

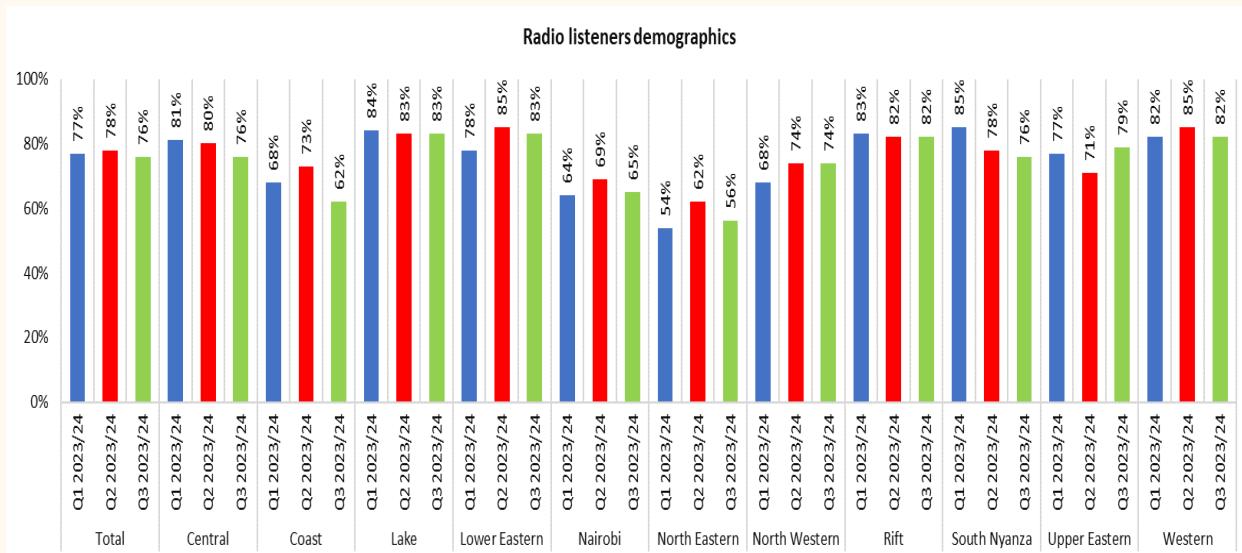


Figure 11: Demographics of radio consumers – by total, Topography

### 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.

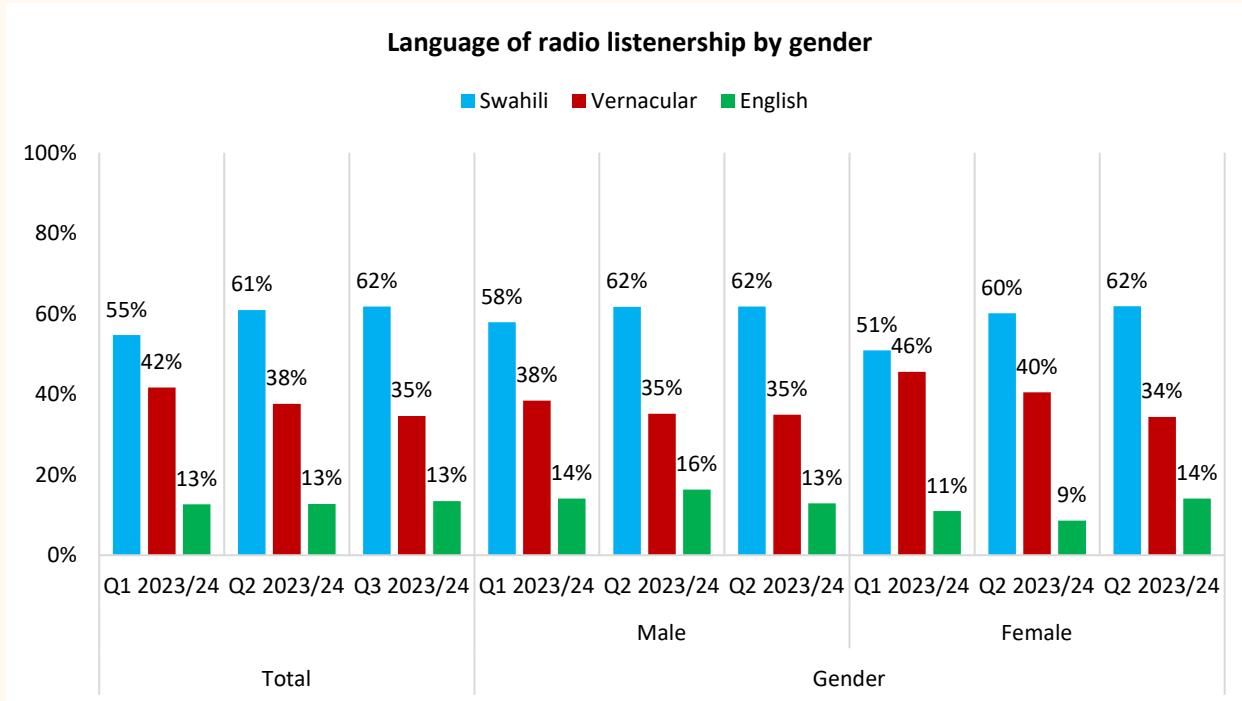


Figure 12: Radio listenership language by total and gender

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

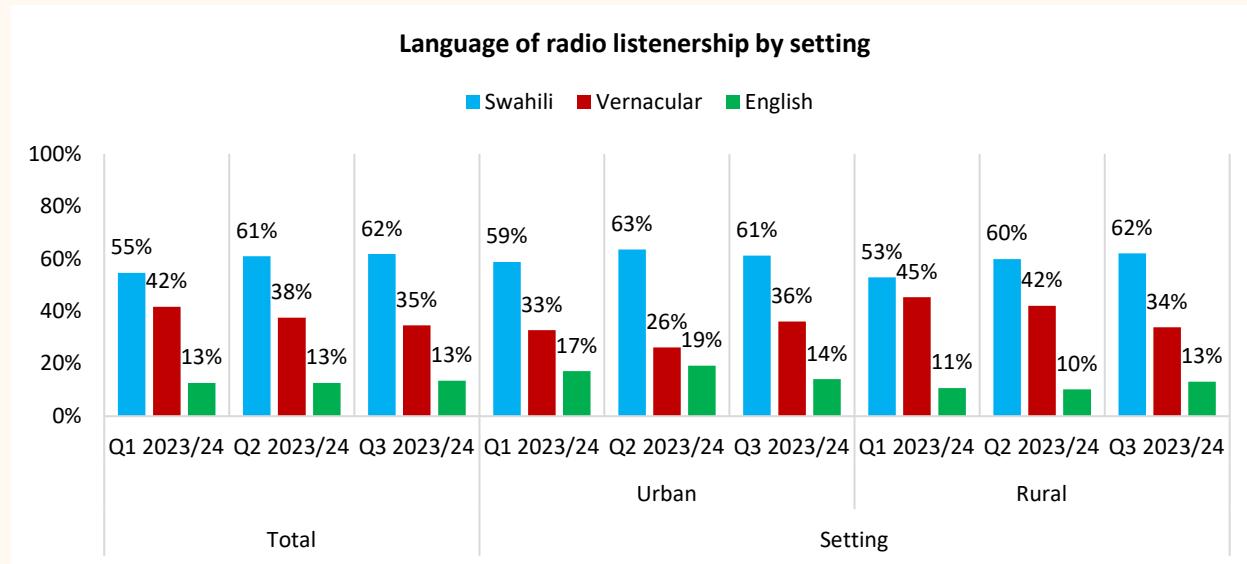


Figure 13: Radio listenership language by total & setting

English is more commonly spoken among urban populations and those in the LSM 12+ category. This might be due to its more frequent use in everyday conversations.

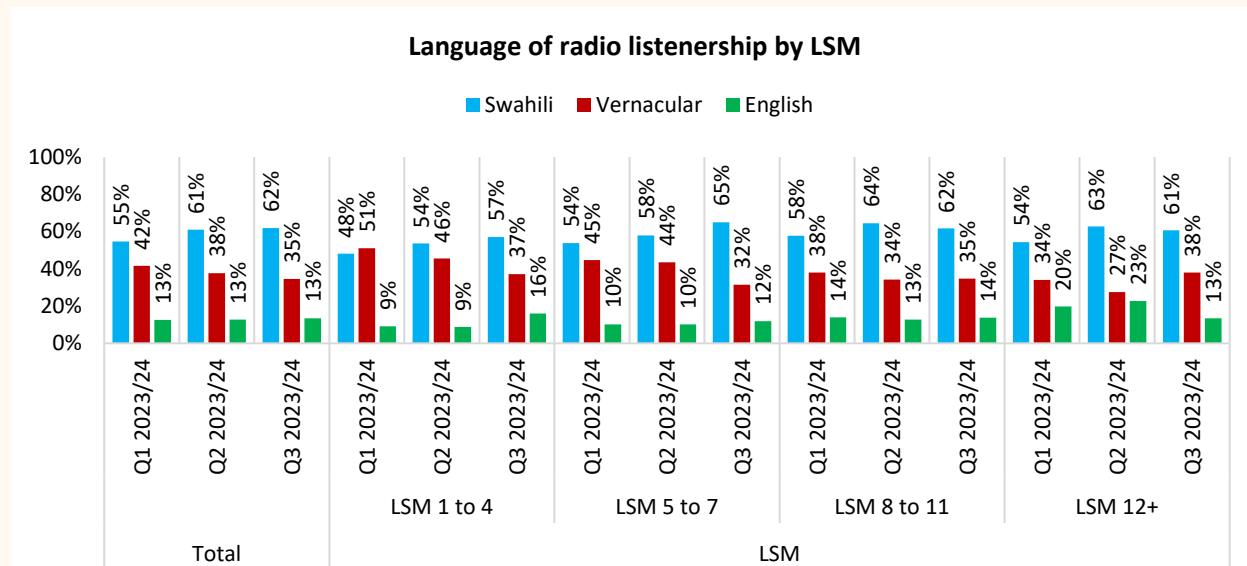


Figure 14: Radio listenership language by total & LSM

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

*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%
Topography	Central	45%	50%	13%
		45%	50%	13%
		62%	36%	12%
	Coast	69%	29%	9%
		77%	20%	10%
		62%	32%	16%
	Lake	46%	56%	7%
		58%	49%	8%
		60%	38%	13%
	Lower Eastern	49%	53%	7%
		50%	53%	8%
		58%	35%	15%
	Nairobi	56%	34%	21%
		61%	21%	30%
		64%	34%	14%
	North Eastern	41%	33%	30%
		60%	21%	24%
		61%	33%	13%
	North Western	57%	33%	21%
		64%	22%	23%
		67%	25%	19%
	Rift	56%	39%	15%
		67%	34%	16%
		67%	30%	12%
	South Nyanza	59%	45%	7%
		58%	42%	10%
		59%	46%	15%
	Upper Eastern	54%	39%	15%
		53%	44%	12%
		53%	39%	13%
	Western	70%	29%	11%
		80%	24%	6%

## 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 three quarters. The increase in viewership among 15- to 17-year-olds, indicates TV networks and streaming services are producing more content targeted specifically at teenagers, addressing their interests and concerns. This may attract more teens to watch TV despite their academic responsibilities.

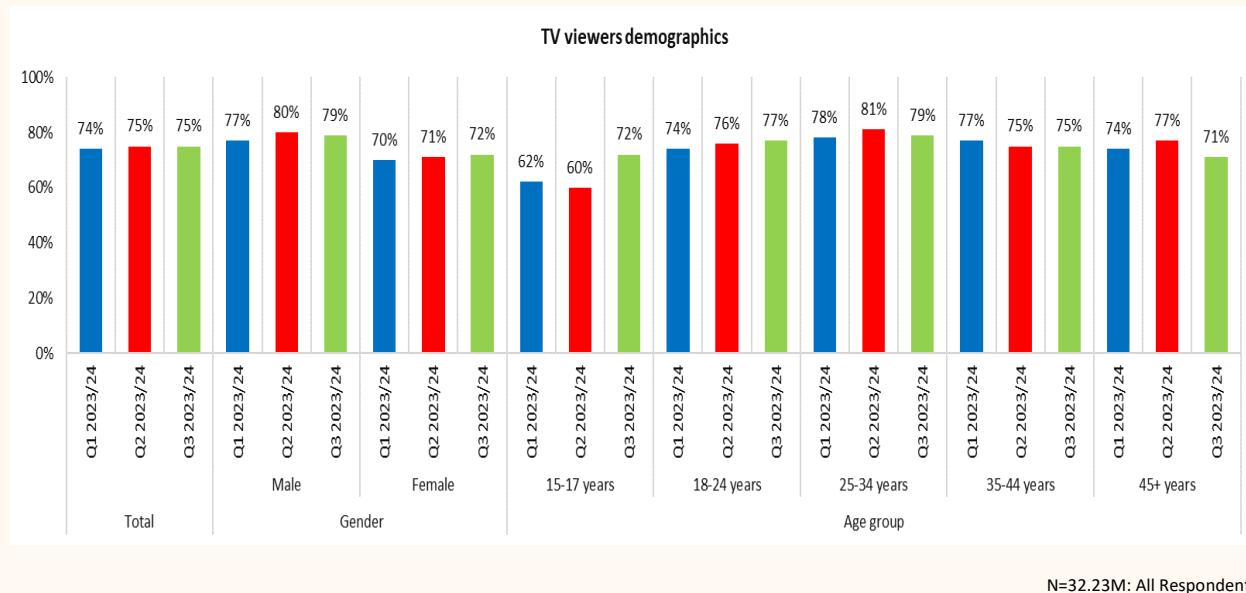


Figure 15: TV Viewership demographics – by total, gender and age group

The decreased number of viewers in the lower LSM segments highlights the impact of socioeconomic variables, like restricted availability of television sets. This stresses the importance of developing customized approaches to cater to various demographic and socioeconomic aspects in enhancing TV viewership.

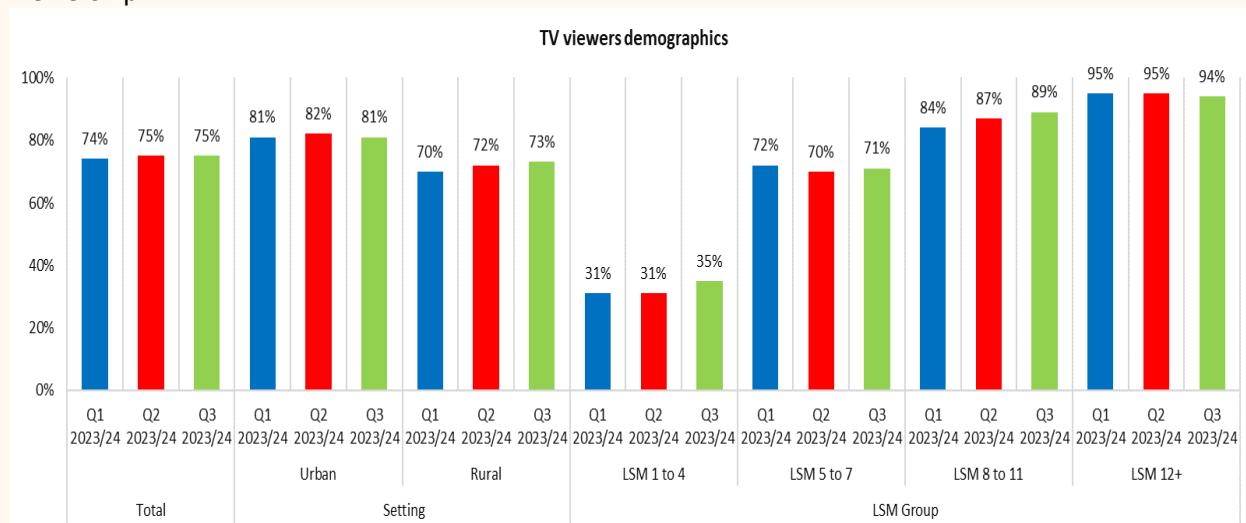


Figure 16: TV Viewership demographics – by total, setting and LSM

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

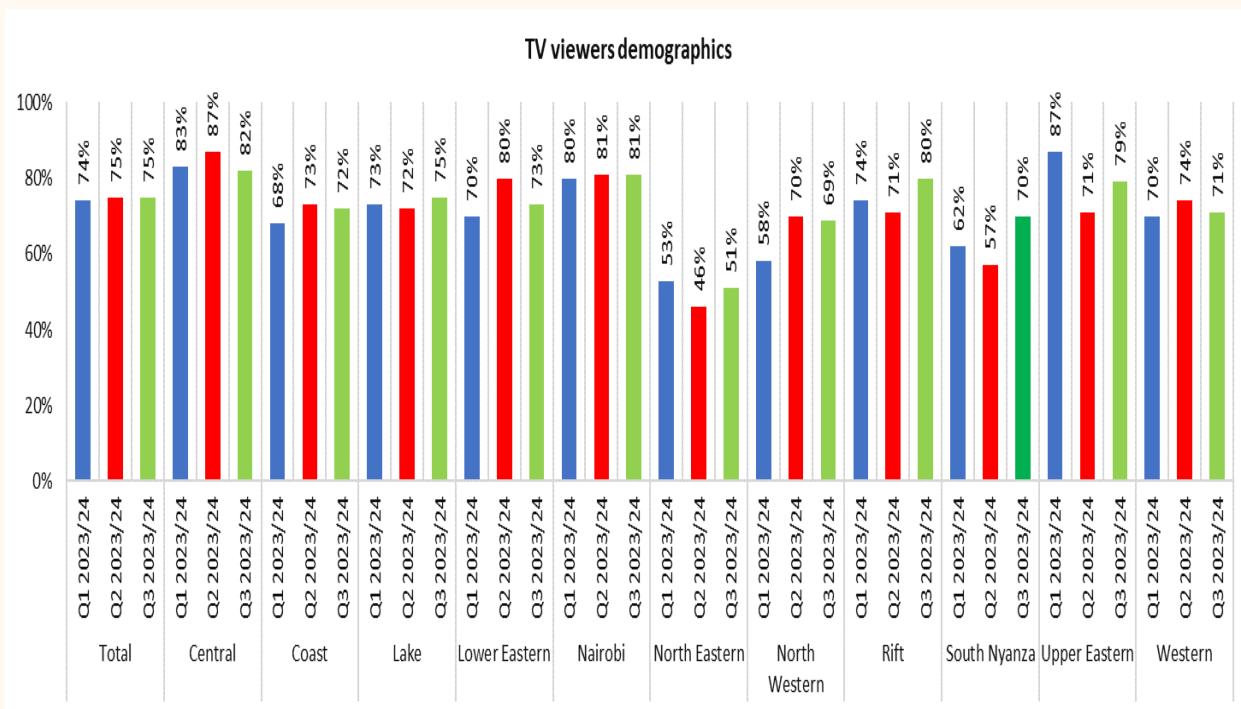


Figure 17: TV Viewership demographics – by total, topography and setting

## 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.

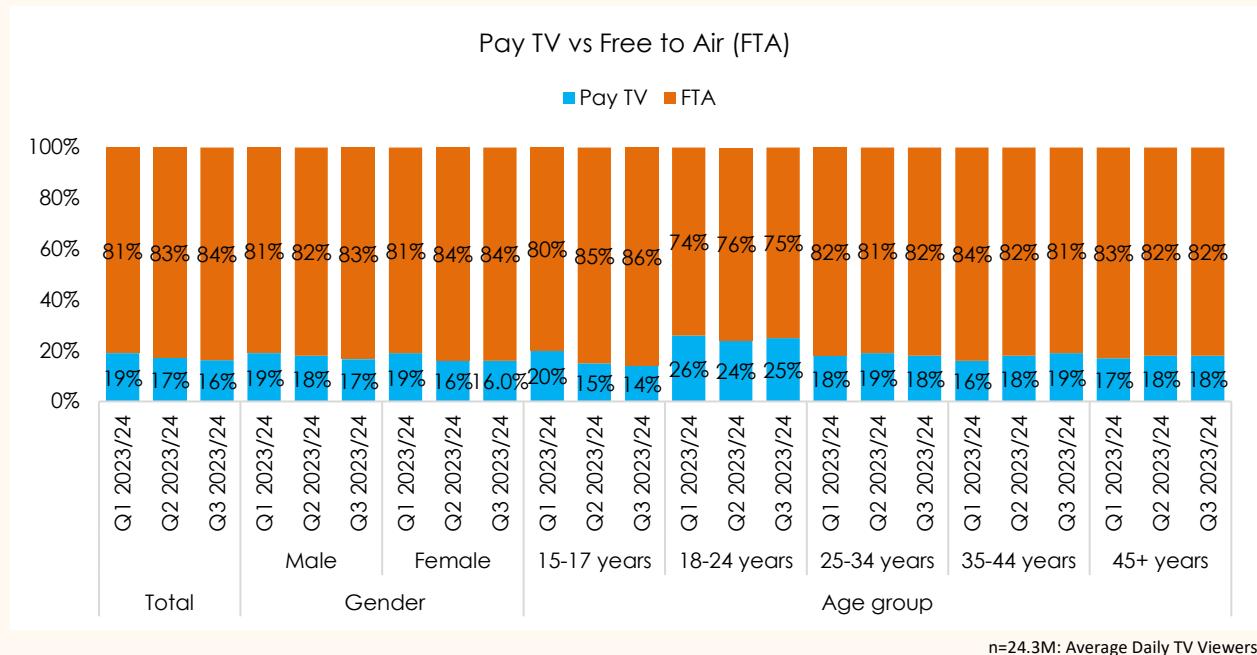


Figure 18: Pay TV vs Free to Air TV Reach – total, age and LSM

In urban areas, pay TV access is higher than rural areas. It is also higher amongst those aged LSM 12+.

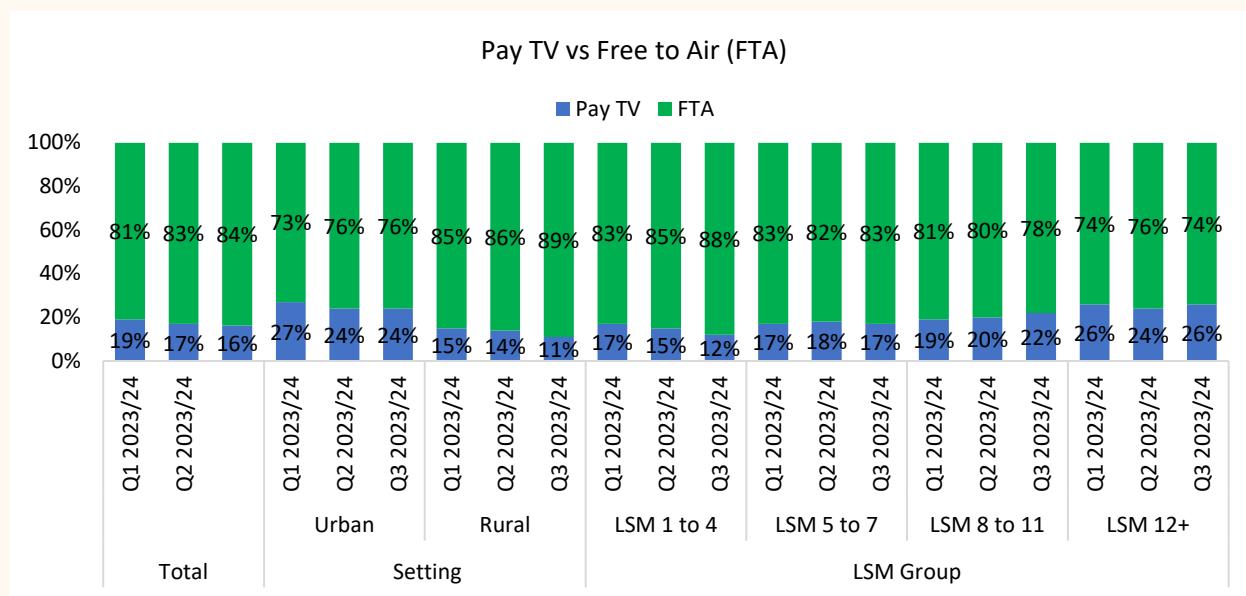


Figure 19: Pay TV vs Free to Air TV Reach - total and gender

#### 4.3. Exposure to impact of advertising

Typically, higher audience size coupled with a higher number of spots indicates potentially higher exposure and impact of the advertising campaign. Peak hours have the highest number of advertisement spots aired. These hours represent when the advertising frequency is the highest. The highest number of spots are aired between 18:00-22:00, indicating a high frequency of exposure during this hour.

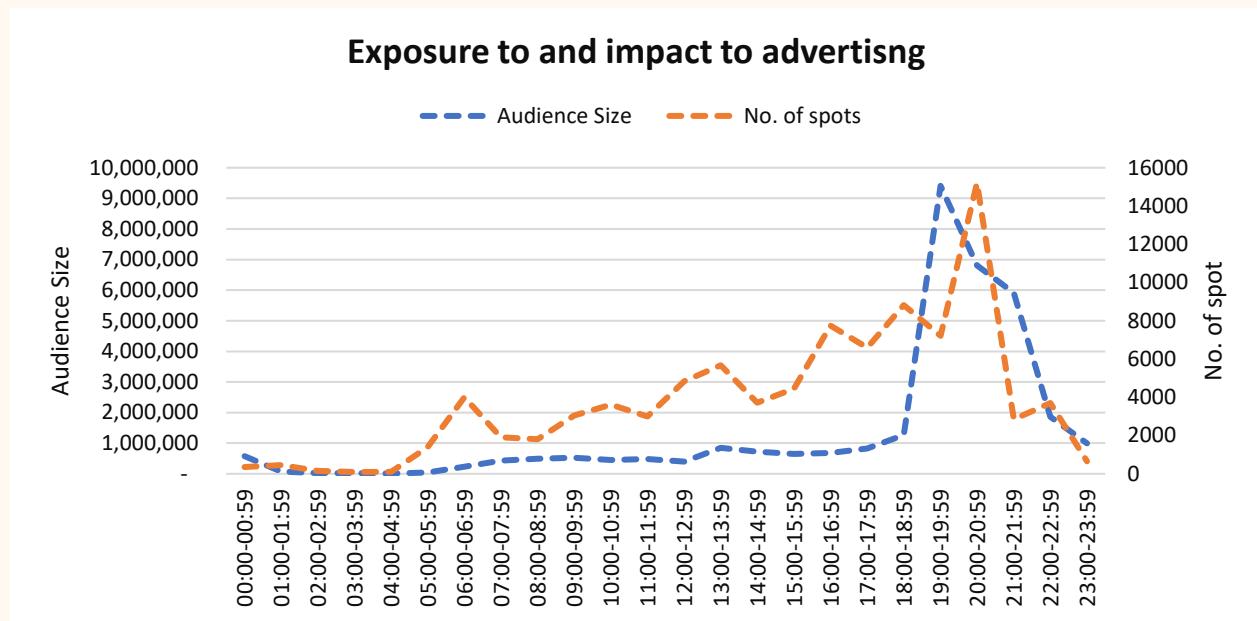


Figure 20: TV exposure to and impact to advertising

#### 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 below 34 years.

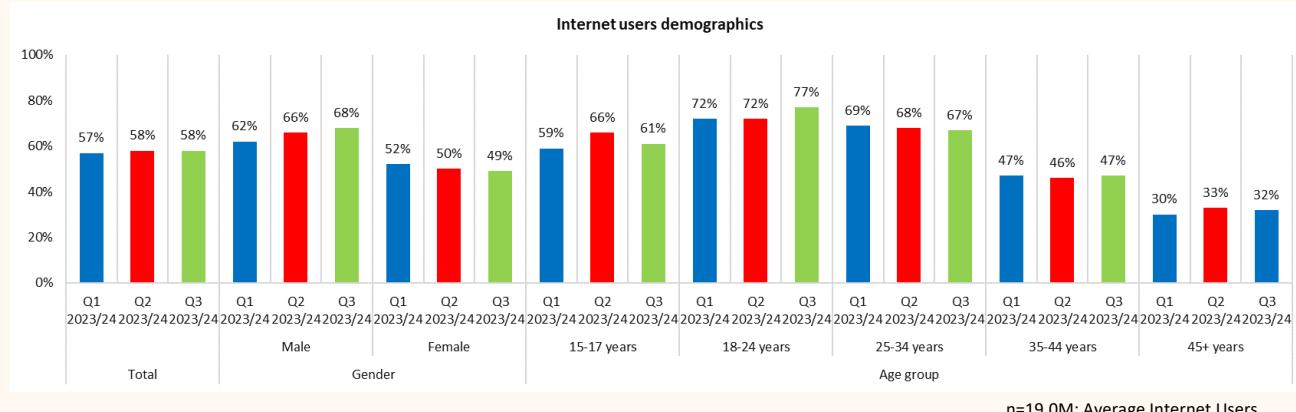


Figure 21: Internet users' demographics – total, gender and age group

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.

Moreover, urban locales have better social economic resources, fostering increased penetration of digital devices and technology adoption in comparison to rural regions. The higher the LSM, the higher the internet usage.

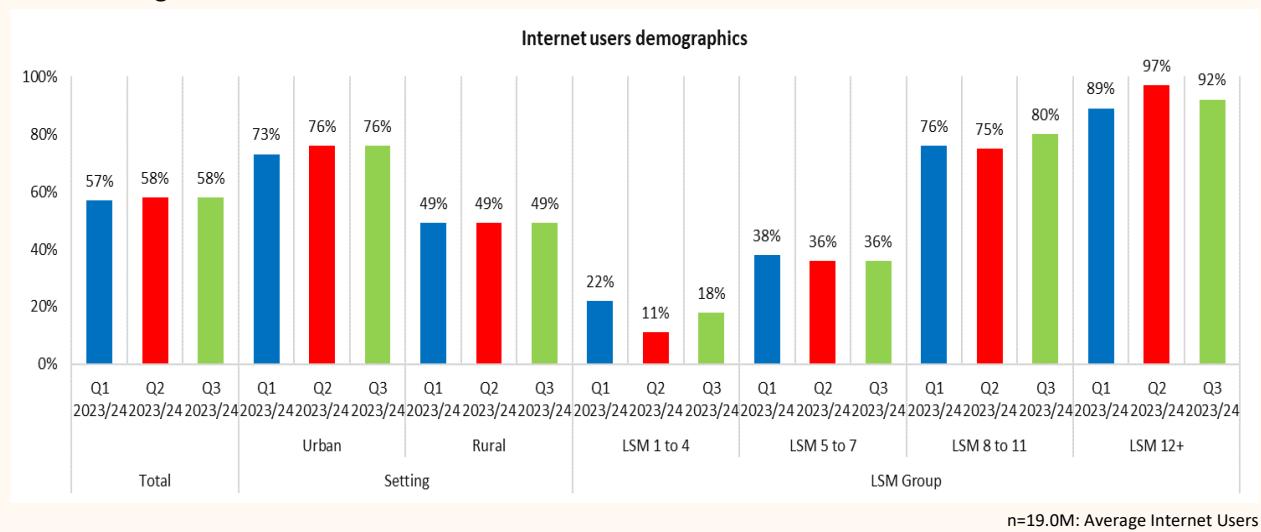


Figure 22: Internet users' demographics – total, setting and LSM

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

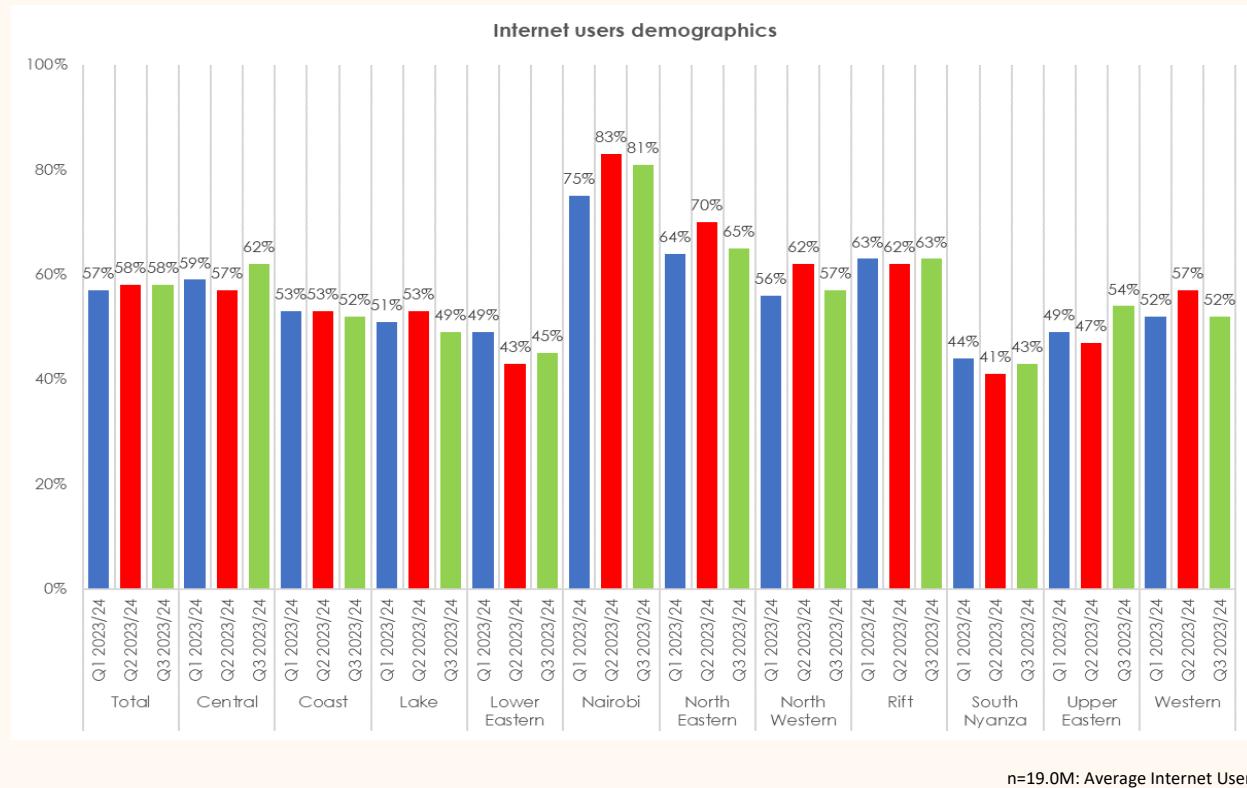


Figure 23: Internet users' demographics – total and topography

## 5.2. Devices Used

The most mode of internet access is primarily through smartphones, underscoring the pivotal role these devices play in facilitating connectivity and information access for a wide range of users. As mobile technology continues to advance, ensuring equitable access to smartphones becomes crucial for fostering digital inclusion and bridging gaps in connectivity across various demographics.

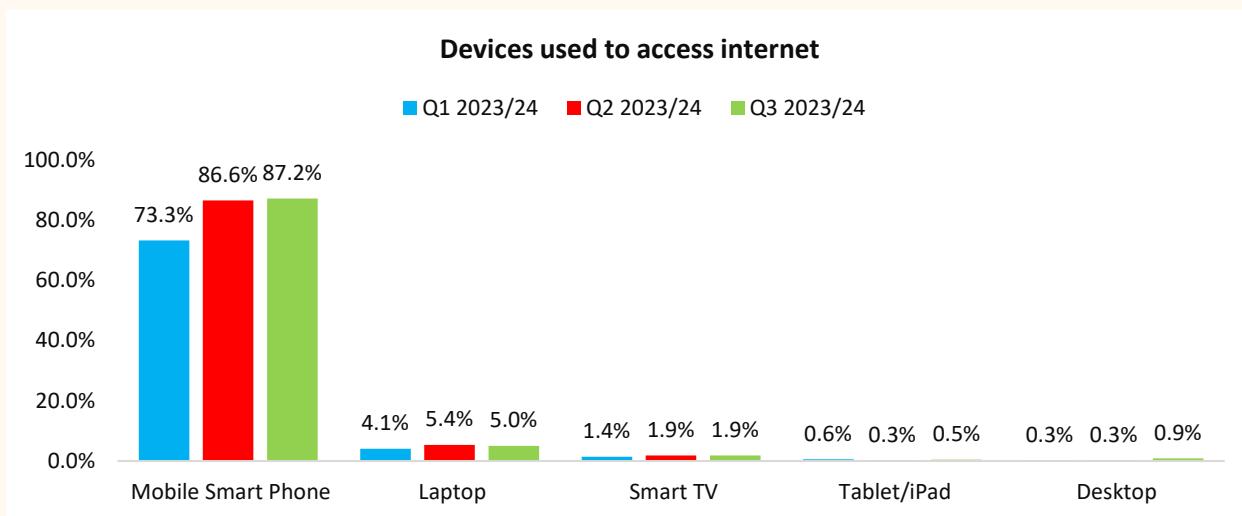


Figure 24:Devices used to access the internet

### 5.3. Social Media Platforms

Facebook and WhatsApp stand out as the top social media platforms in Kenya. Following closely in popularity, YouTube and TikTok 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.

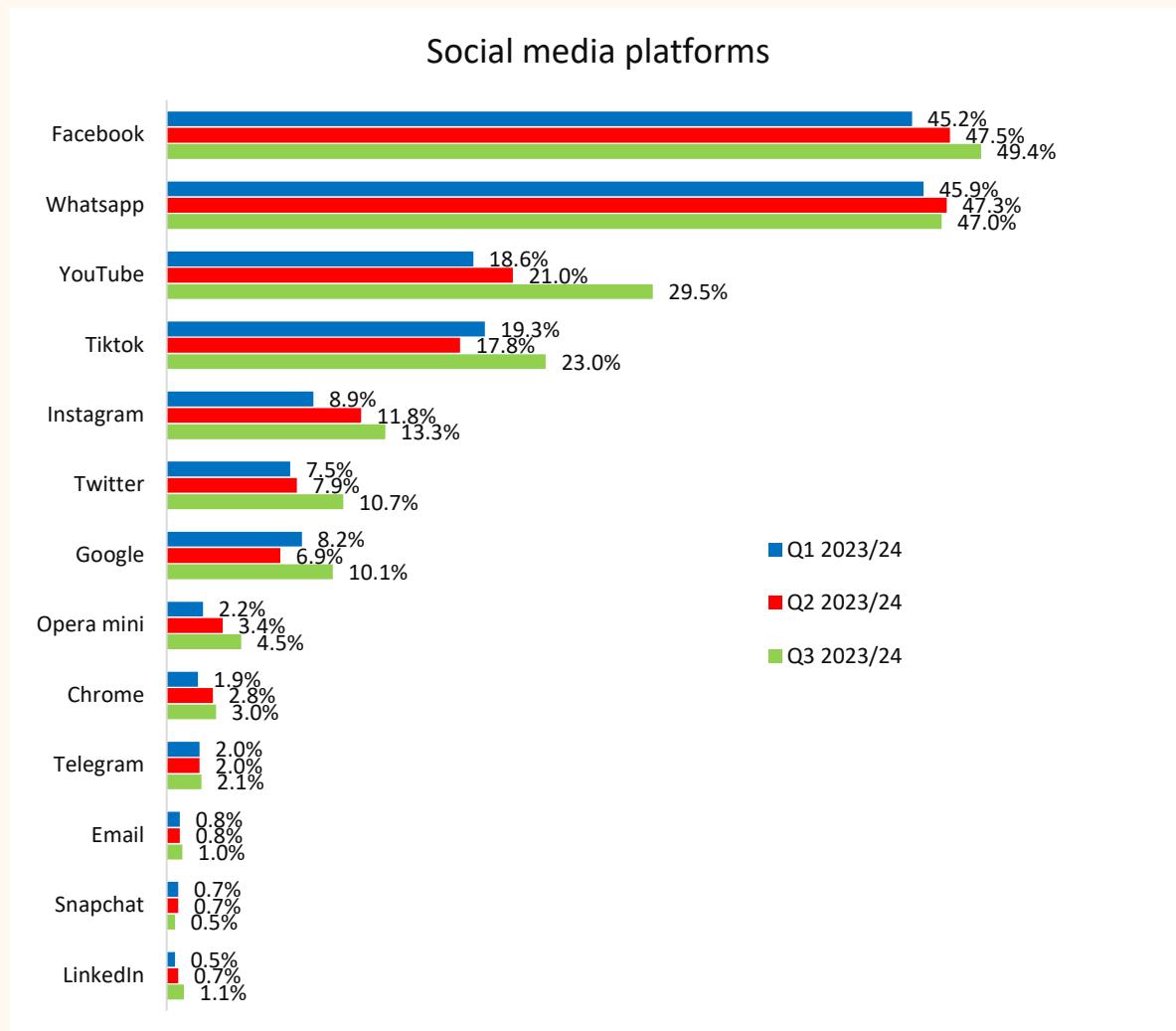
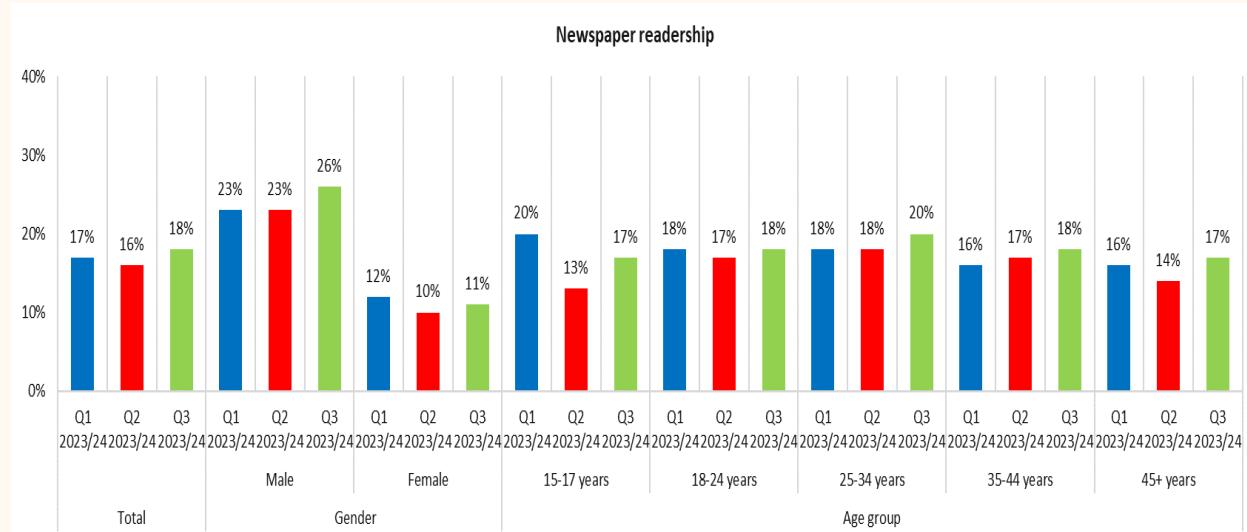


Figure 25: Popular social media platforms

## 6. Newspaper Readership

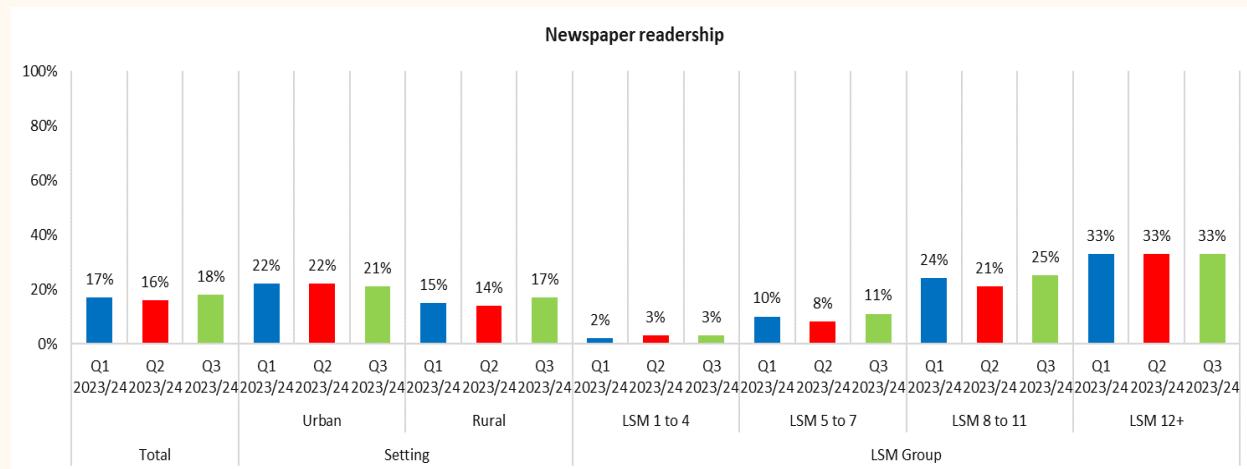
There are more males who read newspapers as compared to females. In terms of age, readership is fairly similar.



n=32.2M: All Respondents

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

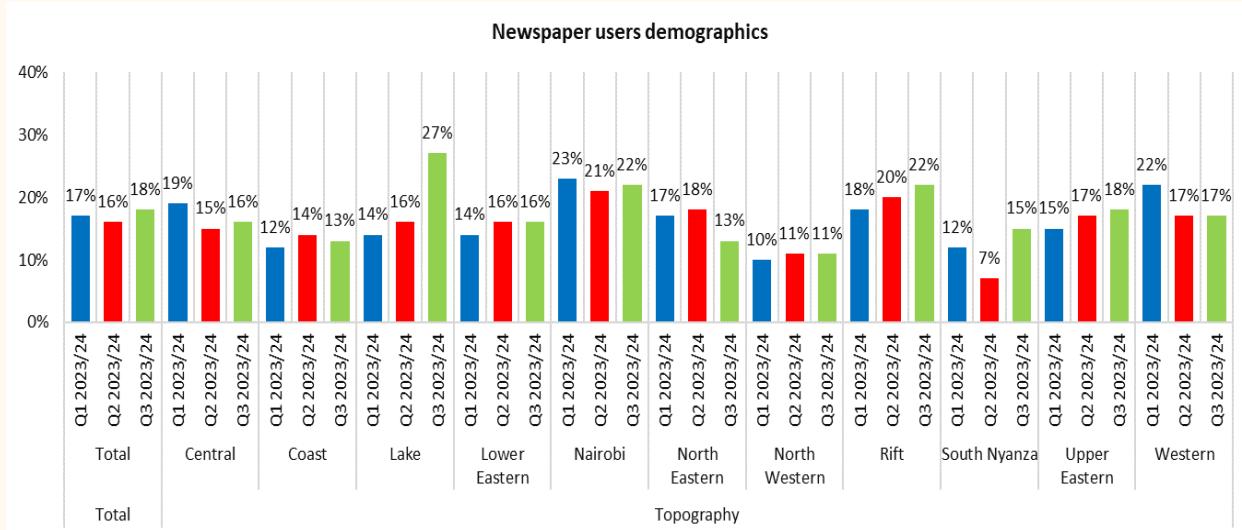
The urban areas and higher LSMs have a higher incidence of readership.



n=32.2M: All Respondents

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

In Q3 2023/24, higher newspaper readership incidences are reported in the Lake, Nairobi and Rift topographies. There has been a significant increase in readership in the Lake topographies from 16% to 27%.



n=32.2M: All Respondents

Figure 27: Newspaper readership demographics – by total and topography

## 7. Advertising Expenditure

### 7.1. Advertising Expenditure Overview

The industry's total spending rose from Kes 16 billion to 17 billion between Q1 2023/24 and Q2 2023/24 but dropped to Kes 15 billion in Q3 2023/24. In Q3 2023/24 Financial Service has the highest sector expenditure, followed by Media.

Table 4: Advertising Expenditure

Sectors	Q1 2023/24	Q2 2023/24	Q3 2023/24	CHANGE (Q3-Q2)
Financial Services	2,317	2,392	2,285	-4%
Media	2,678	3,331	1,996	-40%
Corporate & Multi-brand	1,403	1,929	1,517	-21%
Betting & Gaming	1,067	1,345	1,403	4%
Personal Care	1,064	1,112	1,304	17%
Communications	1,345	1,006	1,166	16%
Beverage	407	424	925	118%
Property & Building & Acc.	1,355	835	831	-1%
Household	788	851	619	-27%
Foods	894	911	612	-33%
Publishing & Education	540	419	520	24%

Tourism & Entertainment	343	540	506	-6%
Transport	532	545	506	-7%
Veterinary & Agriculture	212	365	418	14%
Retail	324	391	307	-21%
Pharmaceuticals	373	426	259	-39%
Office Equipment & Supplies	373	388	173	-55%
Clothing, Fabrics & Footwear	42	31	23	-25%
<b>Total</b>	<b>16,059</b>	<b>17,242</b>	<b>15,370</b>	<b>-11%</b>

Key: Figures in KES Millions (000,000)

Specifically, TV has the greatest spending, with radio coming in second. Financial services have the highest spending in TV and radio, while 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	1,298	833	153	2,285	15%
Media	1,226	278	492	1,996	13%
Corporate & Multibrand	479	281	757	1,517	10%
Betting & Gaming	758	600	45	1,403	9%
Personal care	1,209	94	1	1,304	8%
Communication	858	302	6	1,166	8%
Beverage	713	211	1	925	6%
Property & Building & Acc.	746	59	26	831	5%
Household	520	89	10	619	4%
Foods	446	164	2	612	4%
Publishing & education	317	124	79	520	3%
Tourism & entertainment	402	86	18	506	3%
Transport	357	129	20	506	3%
Veterinary & Agriculture	149	267	1	418	3%
Retail	186	114	7	307	2%
Pharmaceuticals	176	77	6	259	2%
Office Equipment & Supplies	140	32	1	173	1%
Clothing, Fabric and Footwear	17	3	4	23	0%
<b>Grand Total</b>	<b>9,999</b>	<b>3,743</b>	<b>1,628</b>	<b>15,370</b>	<b>100%</b>

Key: Figures in KES Millions (000,000)

## 7.2. Year to Date Advertising Trends

While electronic media showed positive trends, media purchasing witnessed an 18% growth by the end of the third quarter.

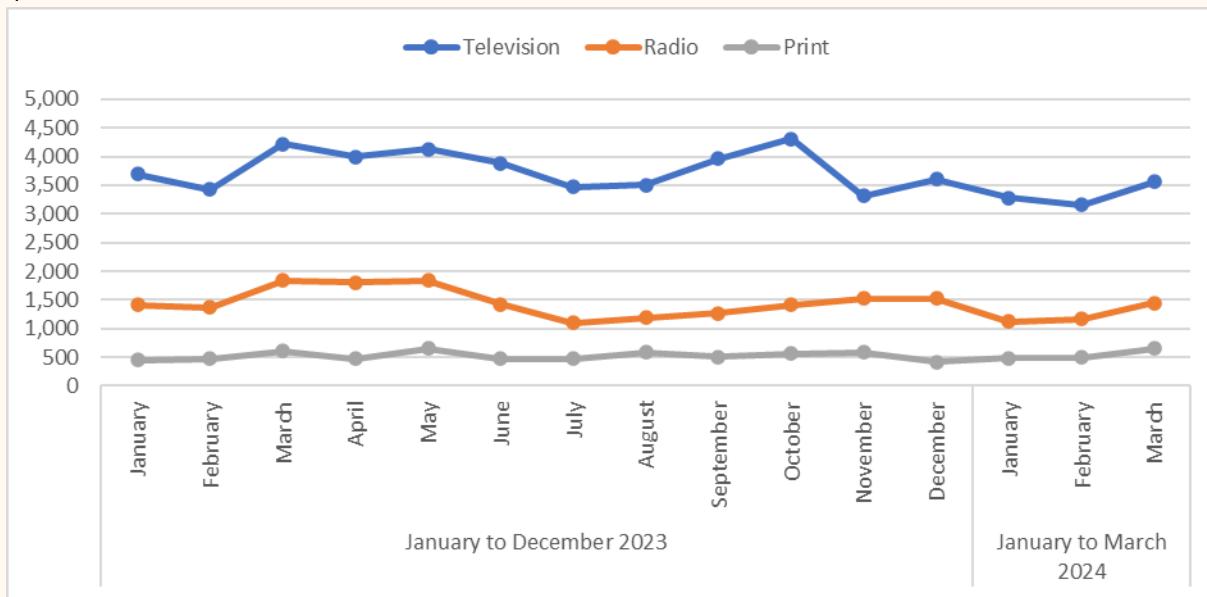


Figure 28: Advertising spends Jan 2023 to March 2024

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.

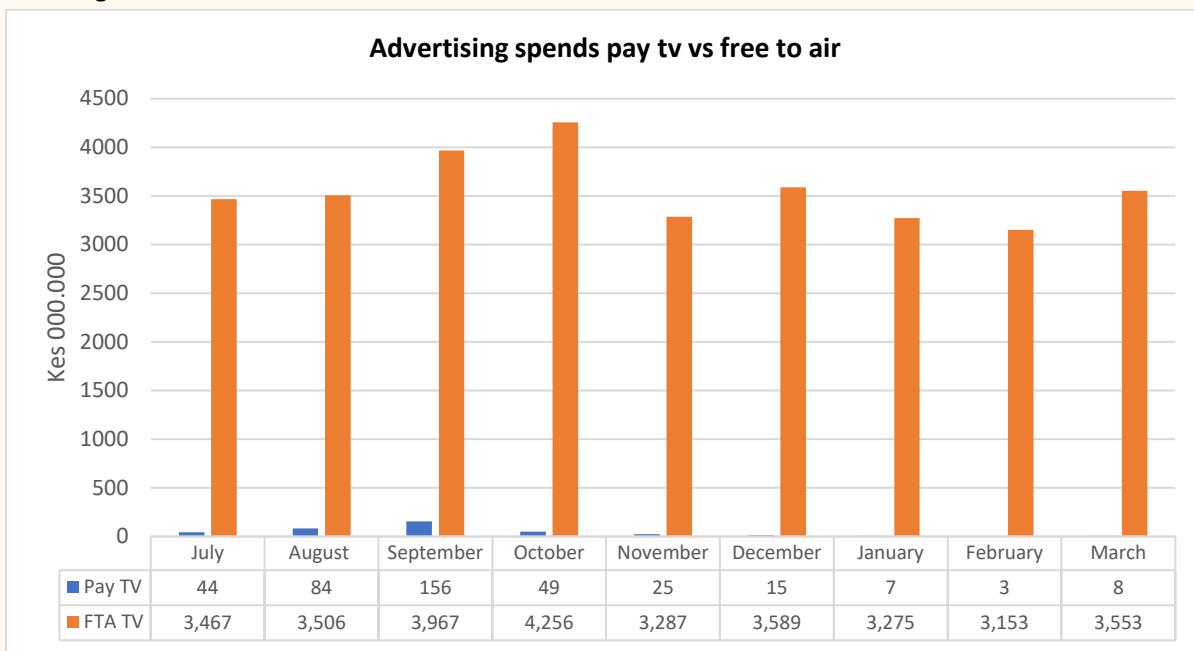


Figure 29: Advertising spends pay TV and free to air TV

Key: Figures in KES Millions (000,000)

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

The FMCG sectors struggles with the heavy load of economic inflation, which is impacting consumer purchasing power. Reduced media budget across sectors resulted in increased media house campaigns.

Table 6: TV spends by sector/industry

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

Key: Figures in KES Millions (000,000)

#### 7.5. Radio Spends by Sector/Industry

Financial services have the highest advertising spend on radio.

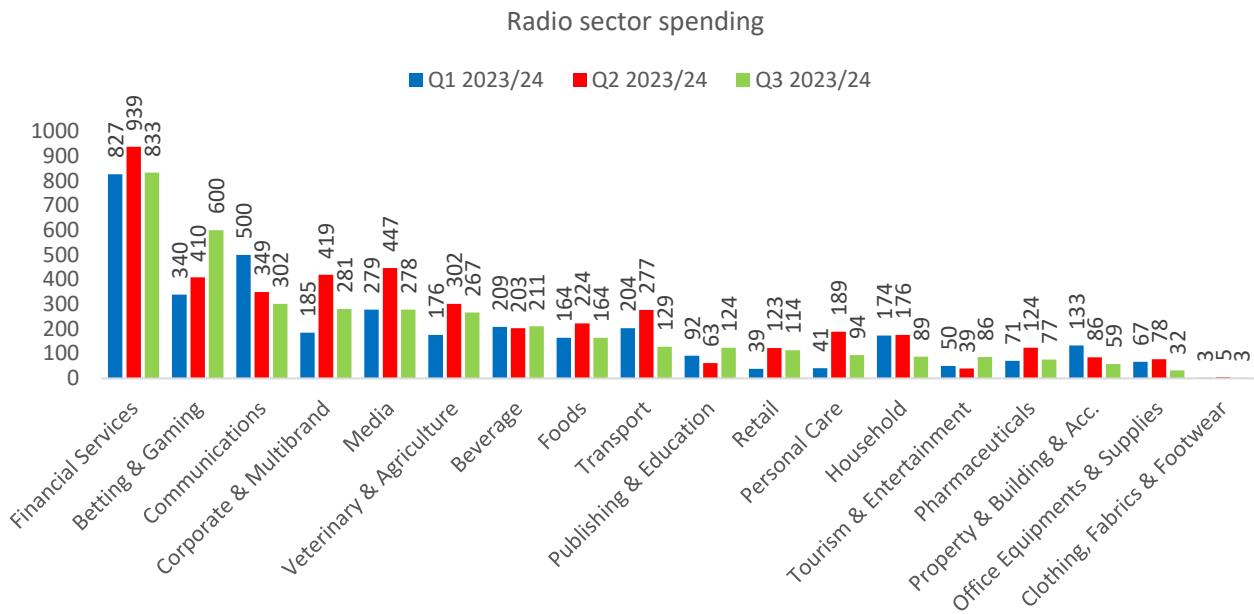


Figure 30: Advertising spend by sector for radio

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.

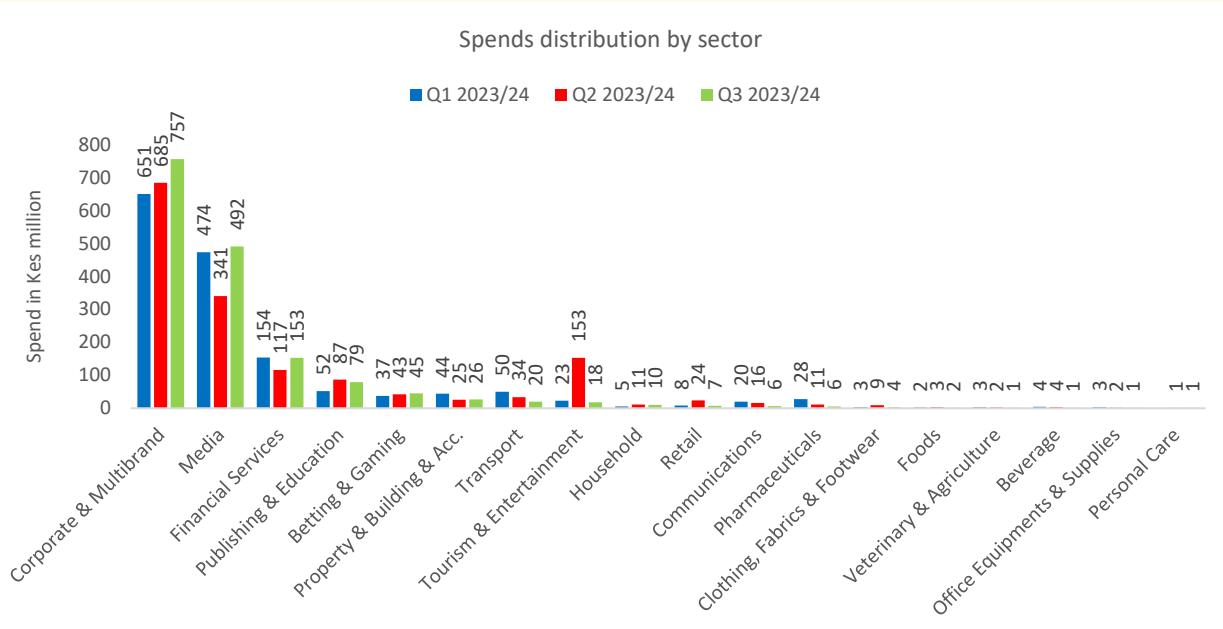


Figure 31: Spend distribution by sector on print

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 Infrastructure

- Rural areas have recorded a low internet penetration rate of 49% from Q1 to Q3 of 2023/24. These areas still face challenges in accessing broadcasting services due to inadequate electricity and internet connectivity. For example, broadcasting towers may struggle to reach remote regions, limiting the availability and quality of broadcasting services in these areas. The inadequate coverage of 4G networks, particularly in rural remote areas, restricts the quality of internet service available to a large segment of the population. Additionally, the high cost of internet bundles relative to average income results in lower internet access rates, with those in lower LSM having only 38% internet access in Q1 2023/24 and 36% in Q2 and Q3 of 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 third 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.
- Furthermore, the growing importance of cross-platform engagement underscores the need for media companies to prioritize integration and coherence in their content distribution efforts. Seamless transitions between various media channels can enhance user experience and foster deeper engagement, ultimately bolstering a company's competitive edge in the ever-evolving media ecosystem.

### Opportunities in the Broadcasting Industry in Kenya

- ❖ **Language of Broadcasting:** Broadcasting in Kiswahili or local languages has helped content reach many people across the country. Most radio stations use Kiswahili (62%) or local languages (35%), reaching a lot of listeners. This is a great chance for content makers to reach more people and explore new markets.
- ❖ **Social Media Game Changer:** Digital platforms like Facebook, WhatsApp, YouTube, and TikTok interact with viewers instantly. These platforms are really popular in Kenya because many people use them and they have a big impact on Kenya's online world.
- ❖ **Diverse Range of content:** People can find different types of content on digital platforms. Entertainment is popular everywhere, but Google is mostly mentioned for educational stuff. YouTube and TikTok are top choices for entertainment, while WhatsApp gets talked about more for social and family matters.