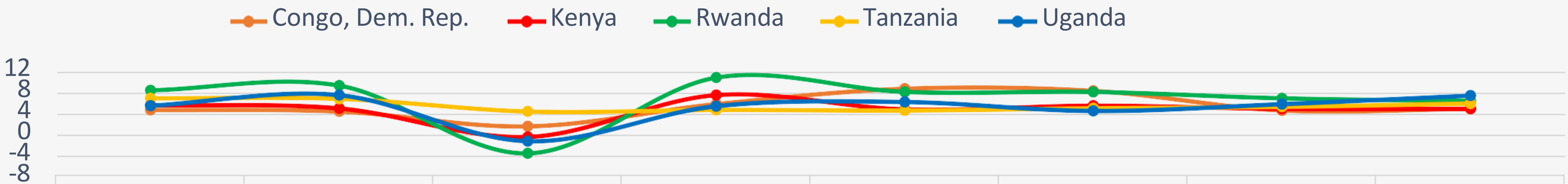
# MEDIA LANDSCAPE: CONSUMPTION, TRENDS & ADVERTISING EXPENDITURE. H1 2025

# Kenya Economic Context & Media Implications

## Economic Growth Outlook




| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 (Projected) | 2025 (Projected) |
|---|---|---|---|---|---|---|---|---|
| Congo, Dem. Rep. | 4.8 | 4.5 | 1.7 | 5.9 | 8.8 | 8.4 | 4.7 | 5 |
| Kenya | 5.7 | 5.1 | -0.3 | 7.6 | 4.9 | 5.6 | 5 | 5 |
| Rwanda | 8.5 | 9.4 | -3.4 | 10.9 | 8.2 | 8.2 | 7 | 6.5 |
| Tanzania | 7 | 6.9 | 4.5 | 4.8 | 4.7 | 5.1 | 5.4 | 6 |
| Uganda | 5.6 | 7.6 | -1.1 | 5.5 | 6.3 | 4.6 | 5.9 | 7.5 |

- **Kenya's GDP Growth:** 4.8% (2025 projected) vs. 5.0% (2024).
- **Key Drivers:** Agriculture recovery, services sector expansion, infrastructure investment, resilient household consumption.
- **Challenges:** High public debt, fiscal consolidation pressures, inflation risks, global economic uncertainty.
- **Media Impact:** Investor caution, potential slowdown in corporate ad spend, accelerated shift toward digital platforms.

***Source: International Monetary Fund***

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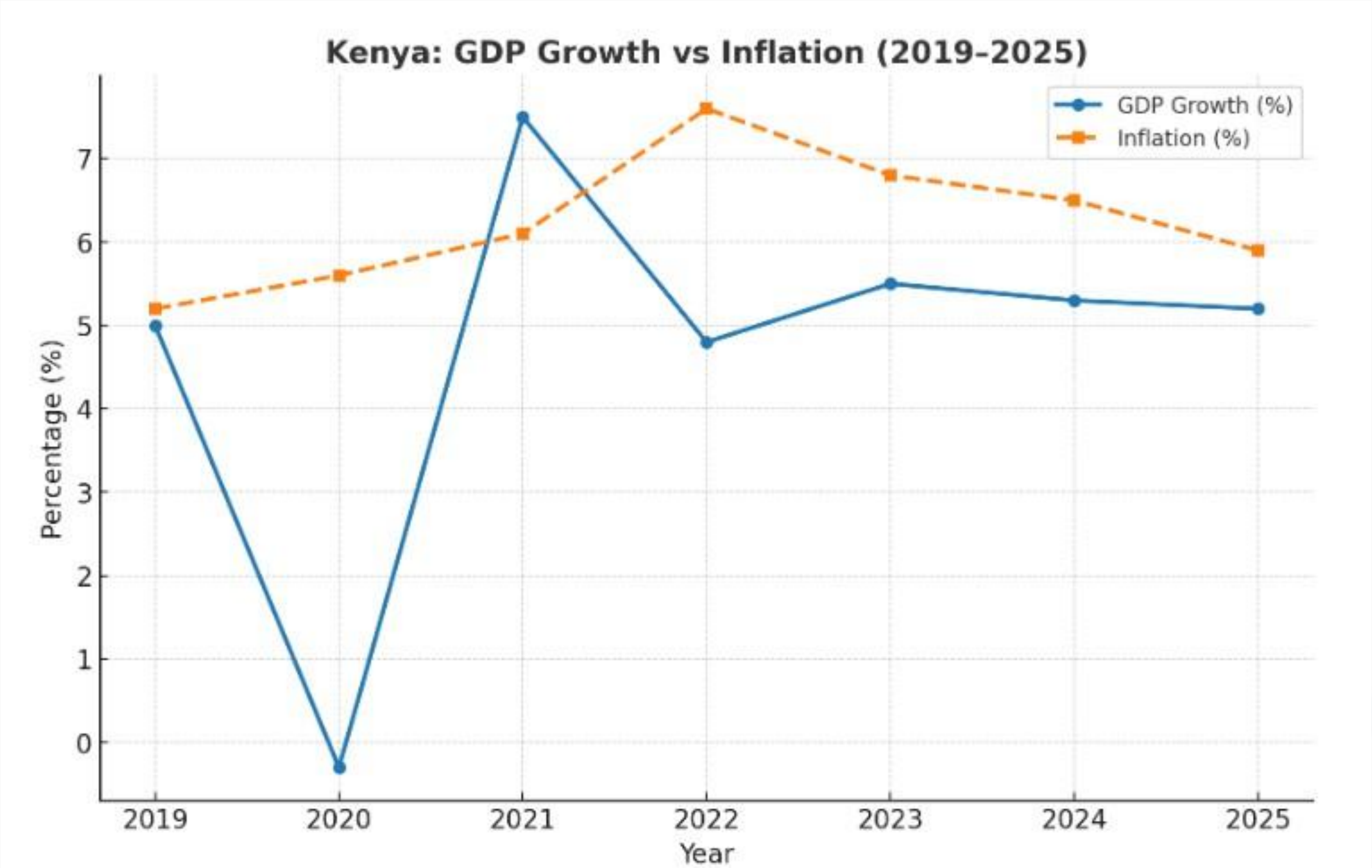
# Kenya Economic Context & Media Implications

- **2020 downturn**: GDP growth experienced a significant decline as a result of disruptions caused by COVID-19, while inflation remained relatively stable.
- **2021–2023 recovery**: The economy rebounded robustly, stabilizing at approximately 5% growth. However, inflation increased during 2022–2023 as a result of global shocks, including rising fuel and food prices, along with currency pressures..
- **2024–2025 stabilization**: Growth has consistently hovered around 5%, while inflation began to ease as supply chains improved and policy measures were implemented. This indicates a transition towards a more stable economic environment.




*Source: reuters.com*

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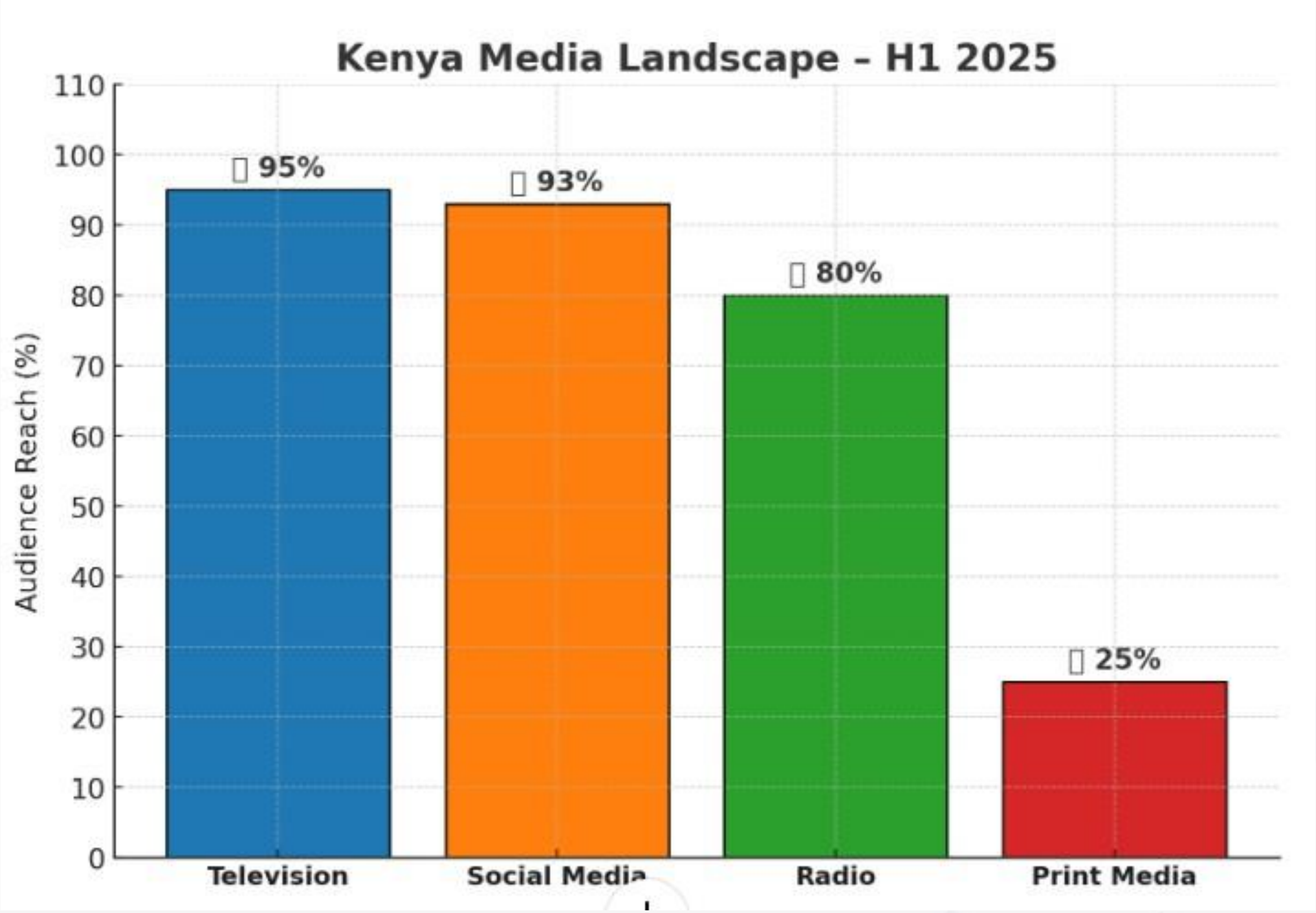
# Overview of Kenya's media Consumption in H1 2025

- **Television (95%)** → Still the most popular medium, it manages to connect with almost every household.
- **Social Media (93%)** → Almost as popular as television, especially among younger and urban demographics.
- **Radio (80%)** → Remains highly relevant, particularly in rural areas, but its reach is slowly declining.
- **Print Media (25%)** → Although it holds a smaller share compared to other media, there are indications of recovery as readership for newspapers and magazines has experienced a slight increase.




*Source:* *twiva.co.ke*

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# Kenyan Digital Landscape 2025 Overview

The digital ecosystem in Kenya by 2025 is characterized by significant growth in mobile connectivity, internet usage, and social media engagement. This surge is fueled by a youthful population and enhanced internet connections.

- **Population & Demographics:** Kenya's population reached **57 million** in January 2025, with a youthful median age of **20 years**. Most people (69.7%) still live in rural areas, while urban centers host 30.3%.
- **Mobile Connectivity:** There are **68.8 million active mobile connections** (121% of the population), reflecting multiple SIM use. Nearly **95% of these connections** are broadband-enabled (3G/4G/5G). Mobile remains the primary access point to the digital world.
- **Internet Access: 27.4 million people (48%)** are online, up by 527,000 since 2024. However, **52% remain offline**, highlighting a significant digital divide, especially in rural areas.
- **Connection Speeds:** Mobile internet speeds improved to **29.97 Mbps** (+37.6% year-on-year), while fixed broadband speeds rose to **14.54 Mbps** (+48.7%), enabling smoother video streaming and digital services.
- **Social Media Use: K**enya has **15.1 million social media user identities** (26.5% of the population), up **16% year-on-year**. Nearly **47% of adults** use social platforms, with a male dominance (60% male vs. 40% female).
- **Platform Highlights:**
  - **YouTube**: 11M users, a key hub for entertainment, news, and education.
  - **Facebook**: 15.1M users, central for networking, business, and marketing.
  - **Instagram**: 3.5M users, strong youth appeal.
  - **TikTok**: Explosive growth to **15.1M adult users**, up 43% year-on-year, making it the fastest-growing platform.

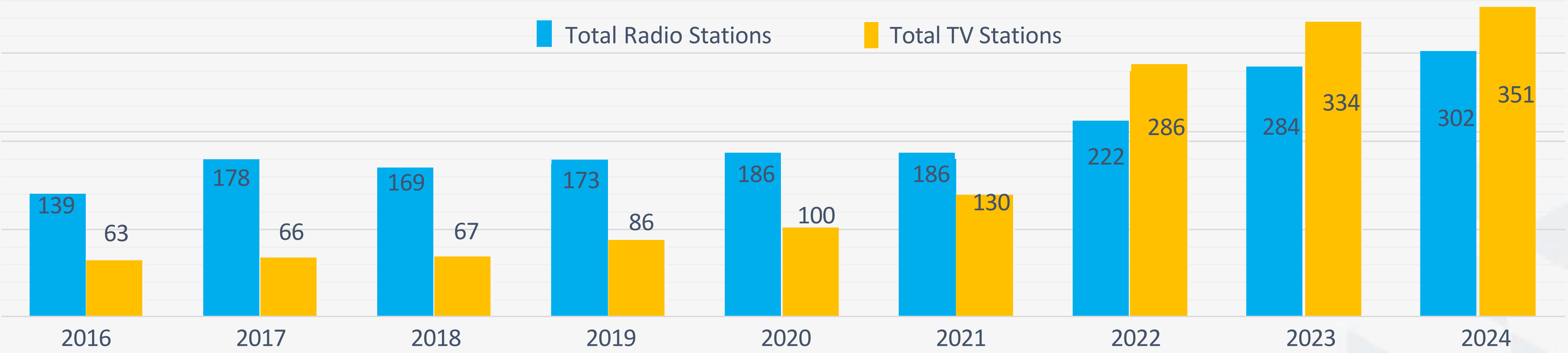
***Source:*** *datareportal.com*

# Media Consumption Trends

# Media Evolution

- Kenya's media landscape is celebrated for its vibrant diversity and ongoing expansion. The country boasts a dynamic radio industry, with over 300 stations transmitting in various local and vernacular languages. The transition to digital terrestrial broadcasting in 2015 has significantly enhanced the television sector. Concurrently, the widespread adoption of mobile phones has enabled Kenya to achieve one of the highest internet penetration rates in Africa, providing citizens with broad access to digital platforms. Nonetheless, these technological advancements coexist within a complex and fiercely competitive environment. Media outlets constantly strive to attract and retain diverse audiences whose content preferences are evolving rapidly.

## Year on Year Growth of Media Stations




***Source:*** ***Communications Authority***

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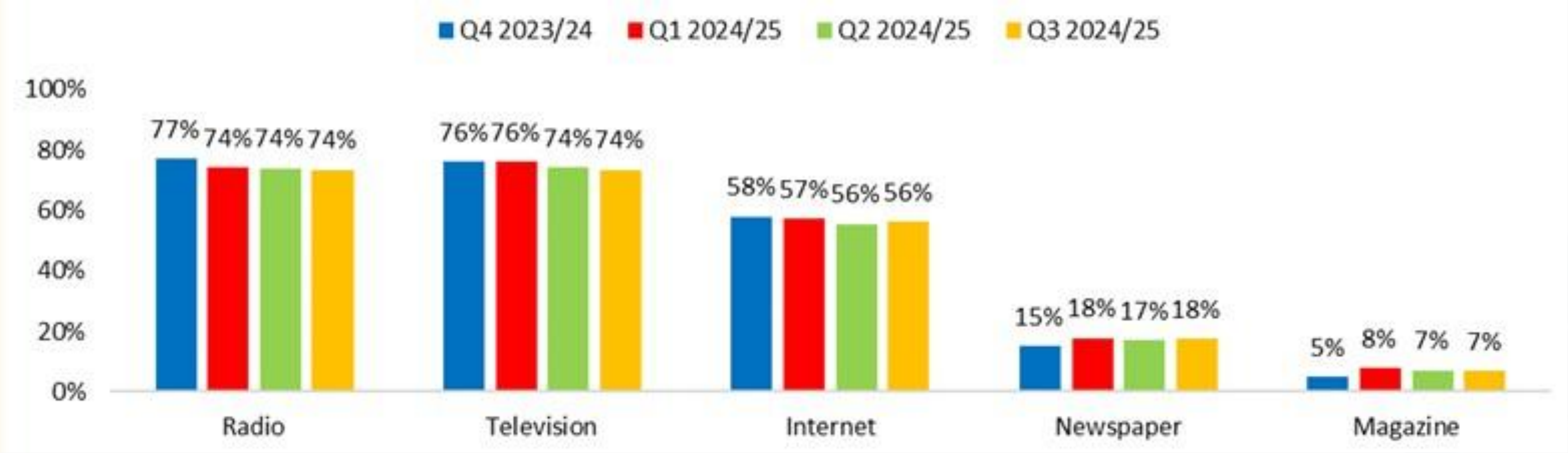
# Media Access

- Over the past four quarters, media access and usage patterns have remained relatively stable. Radio and television continued to be the most accessed media channels, showing little to no change over time. Internet usage experienced remained the same. Interestingly, newspaper saw a small increase in readership in the most recent quarter, reversing a previously declining trend.

**Media Penetration by Type**

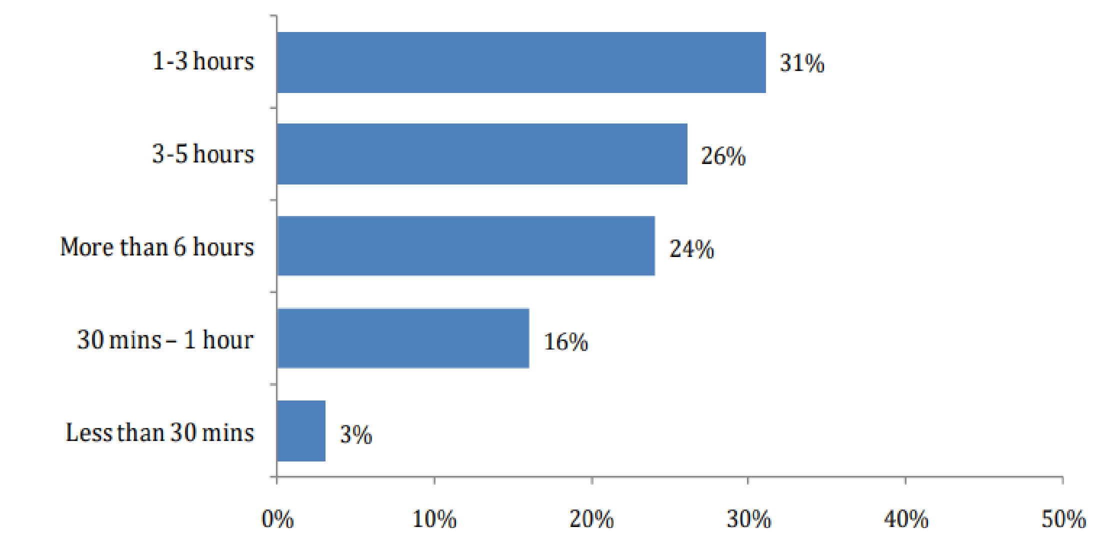



***Source:*** ***[Communications Authority]***

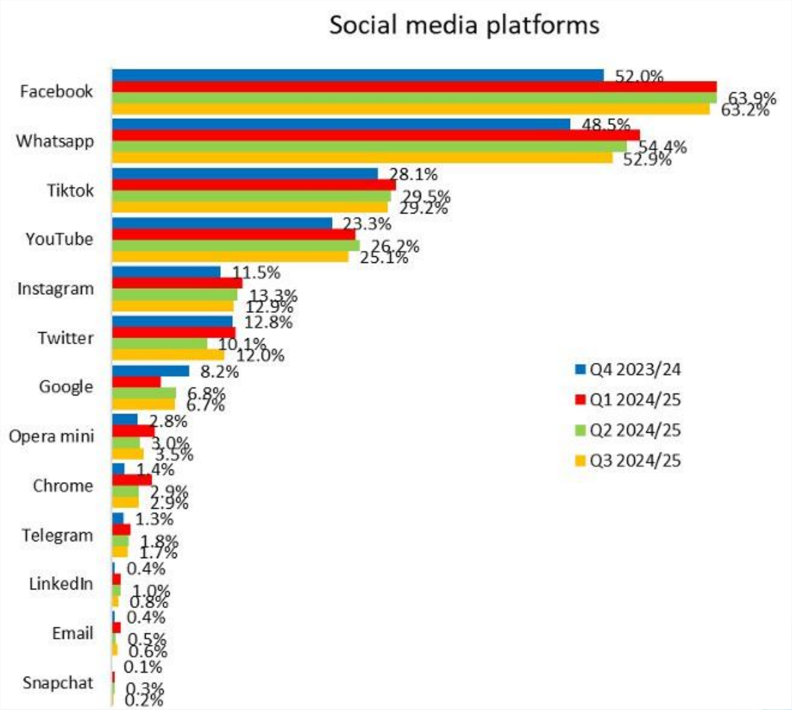
# Social Media Use

- In Kenya, Facebook and WhatsApp rank as the most widely used social media platforms, with TikTok and YouTube coming in third and fourth, respectively. The consistent references to Facebook and WhatsApp highlight their extensive usage and significant influence within Kenya's digital landscape.
- A majority of Kenyans (31%) spend at least three hours on social media platforms. 26% of users engage online for three to five hours, while another notable segment (26%) spends over six hours on these platforms.
- The vast majority of Kenyans utilize social media for various purposes:18% for communication, 18% for entertainment, and 15% for news and information. Notably, only 1% engage in social media for advocacy campaigns. Interestingly, 5% of users are on social media primarily for gossip.

*Time spent on social mediaplatforms per Day*




*Most Used Social Sites*

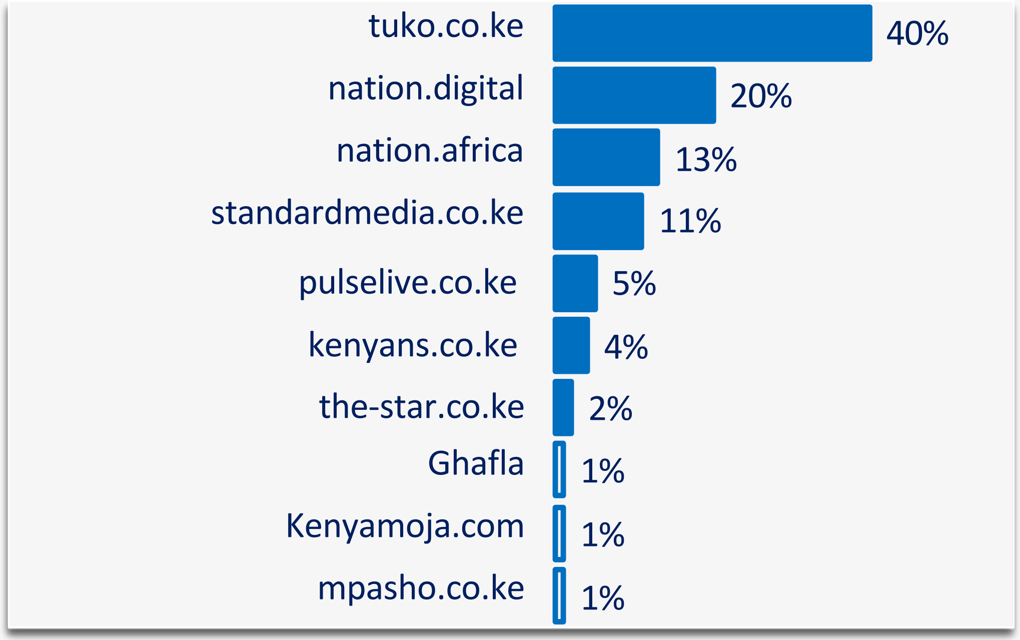



**Source: :** [*Communications Authority of Kenya*]

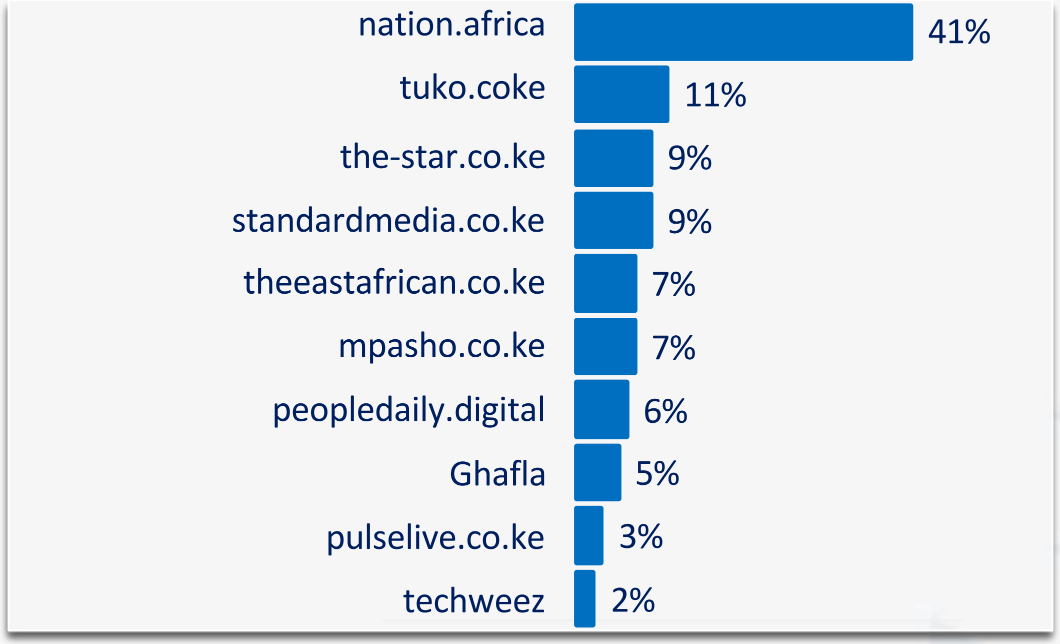
# Websites & Digital Platforms

- In 2025, Nation Digital became the leading news website, with a remarkable readership of 41%, a significant increase from the 20% recorded in 2024. Following closely are Tuko with 11% and The Star with 9%.
- Daily Nation hit 181 million visits in 2024, leading the country's Tier 1 news outlets. It was followed by Tuko (45M), The Star (43M), and The Standard (39M). These giants show Kenya’s unmatched ability to deliver news to millions. In Tier 2, The East African and Mpasho, plus People Daily Kenya and K24 Digital in Tier 3, prove that smaller players thrive, too.

***Most Used Digital Sites 2024***




***Most Used Digital Sites 2025***




*Source: : [Ranked Report]*

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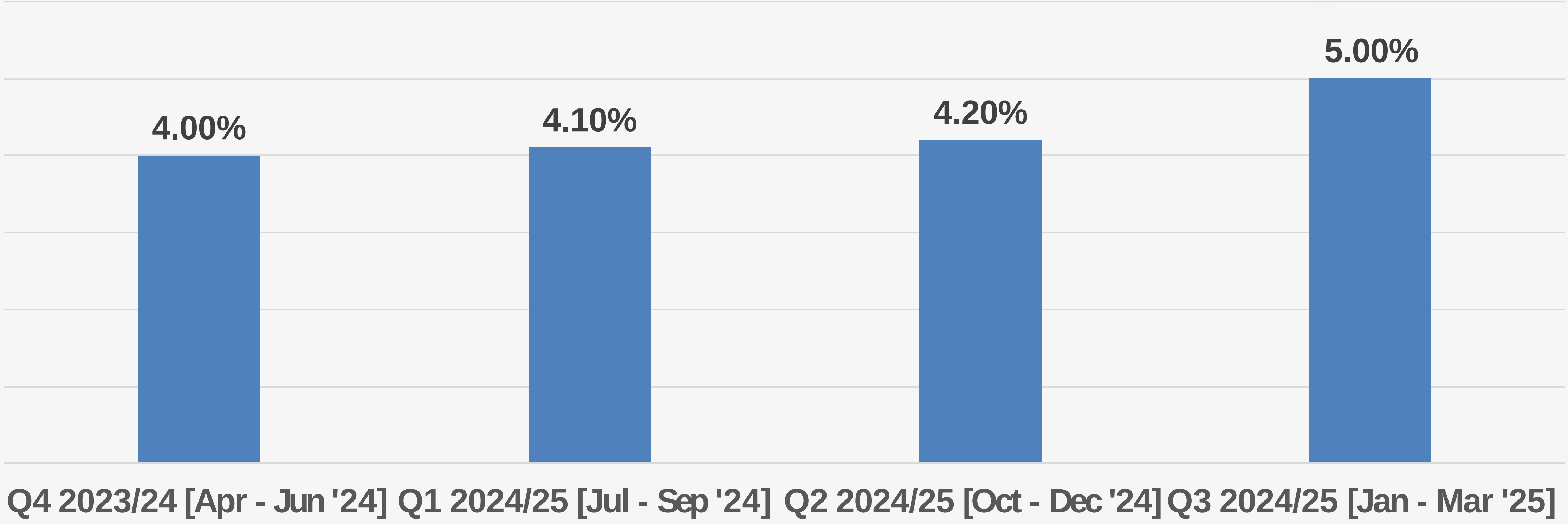
# Online Media Evolution

# Online Media Content Consumption as of Jan – Mar ‘25




- As more Kenyans seek greater access to news and information, they are turning to news websites. This trend is fueled by better internet and smartphone access, the demand for real-time content, and skepticism toward traditional media. Digital platforms provide faster, engaging news experiences, often shared via social media, appealing to a younger, tech-savvy audience seeking reliable updates on political, economic, and social issues.

Audience Measurement And Industry Trends Report – January to March 2025

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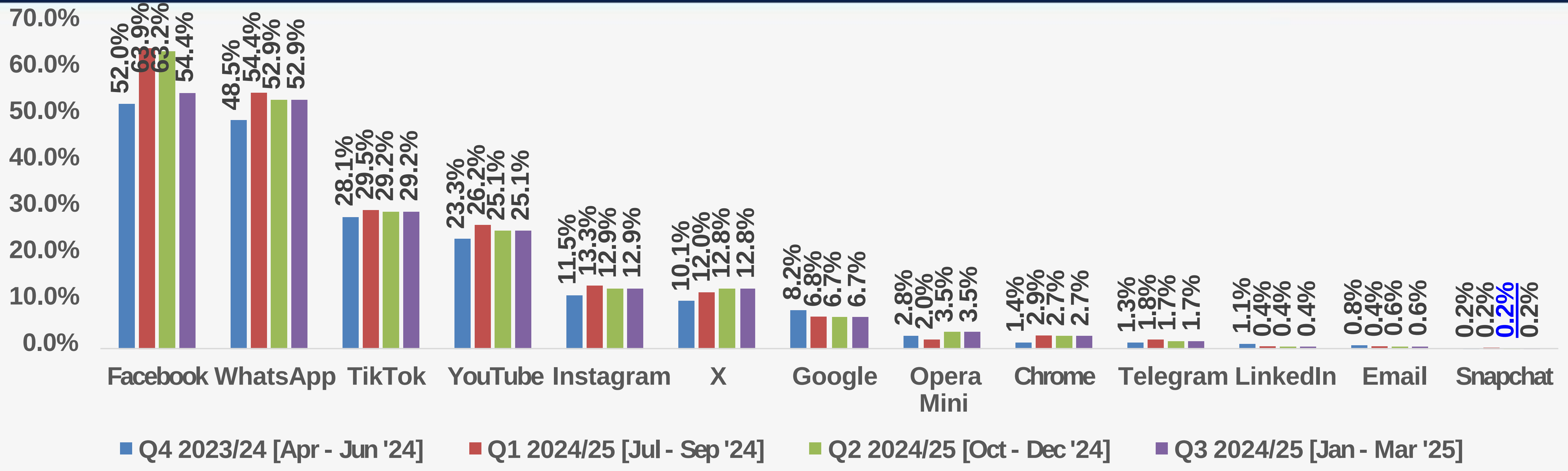
# Social Media Platforms Use as of Jan – Mar '25




- Facebook continues to be Kenya's leading social platform, due to its affordability, versatility, and dedicated user base. It functions effectively on low-end devices, offers free access, and seamlessly integrates social interaction, news, and business in a single platform.
- In Kenya, Facebook and WhatsApp rank as the most popular social media platforms, with TikTok and YouTube following closely in third and fourth places. The frequent references to Facebook and WhatsApp highlight their widespread usage and significant influence within Kenya's digital landscape.

Audience Measurement And Industry Trends Report – January to March 2025

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# Social Media Platforms Use

Remains the most widely used platform, offering broad reach across demographics.

Essential for communication and content sharing, increasingly vital for direct business-customer interaction.

Rapid growth among youth aged 15–34, high engagement, trend-driven.

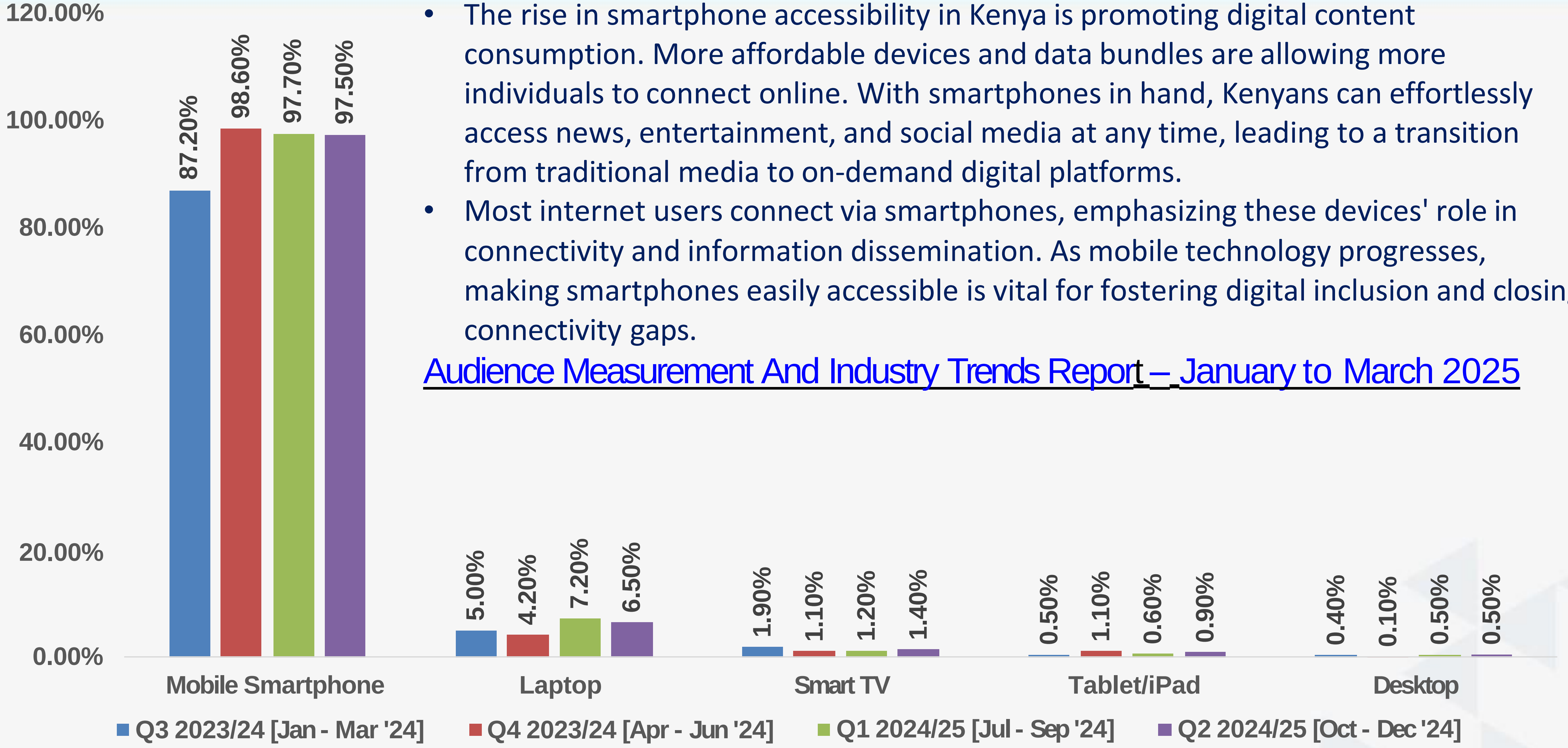
Preferred for longer-form video content, reflects strong demand for video content.

Popular among younger audiences and influencers, strong for lifestyle, fashion, beauty brands.

Used for news and real-time updates, professional engagement. Valuable for specific niches and public relations.

Utilized for professional networking, essential for B2B, recruitment, thought leadership.

# Internet Usage – Access Devices as of Oct – Dec '24




- The rise in smartphone accessibility in Kenya is promoting digital content consumption. More affordable devices and data bundles are allowing more individuals to connect online. With smartphones in hand, Kenyans can effortlessly access news, entertainment, and social media at any time, leading to a transition from traditional media to on-demand digital platforms.
- Most internet users connect via smartphones, emphasizing these devices' role in connectivity and information dissemination. As mobile technology progresses, making smartphones easily accessible is vital for fostering digital inclusion and closing connectivity gaps.

Audience Measurement And Industry Trends Report – January to March 2025

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# Developing Trends In Kenya's Digital Media

## TikTok Trends and Dance Challenges

- TikTok continues to be a powerful presence in Kenya , sparking viral dance challenges, lip-sync performances, and humorous skits. Trending hashtags have garnered significant attention, and the inventive use of "sped-up" songs has emerged as a hallmark style that drives numerous trends. This lively TikTok culture is actively influencing how Kenyans interact with entertainment and showcase their creativity online.

## Shift to Video Content

- Kenyans are quickly transitioning from static images to vibrant video content on platforms such as YouTube, Instagram Reels, and TikTok. This shift is propelled by social media algorithms that favor video for greater engagement. As a result, there's a notable increase in local stories, vlogs, and live streams that celebrate Kenya's rich and diverse culture in innovative and creative formats.

## Growing Popularity of Podcasts

- Podcasts have experienced significant growth in Kenya, thanks to affordable internet access. They provide on-the-go insights into subjects such as politics, pop culture, and mental health, delivering a more personal experience compared to traditional radio. Hosts cultivate engaged communities via social media, featuring a variety of voices from everyday stories to expertise. Although podcasts are smaller than social media or television, they wield considerable marketing influence through trusted, influencer-style ads. This has prompted brands to incorporate them into multimedia strategies to effectively reach niche audiences.

## Global Social Media Accountability

- Kenyan courts set a significant legal precedent by ruling that Meta (the parent company of Facebook) can be held accountable in Kenya for content distributed on its platforms, even without local registration. This landmark decision reflects an increasing regulatory focus on social media platforms in addressing hate speech and misinformation.

- In 2022, Meta faced a lawsuit in Kenya for allegedly allowing violent and hateful content from Ethiopia to thrive on Facebook, inflaming the Ethiopian civil war. The lawsuit, initiated by two Ethiopian researchers alongside the Katiba Institute, a rights group in Kenya, claims that Facebook's recommendation systems intensified the visibility of violent posts in Ethiopia, including some that were linked to the murder of one researcher’s father..

- In a landmark ruling made in April 2025, a Kenyan court ruled that Meta, the parent company of Facebook, can be held liable in the East African region for its purported role in promoting content that incited ethnic violence in neighboring Ethiopia. This ruling may affect how Meta collaborates with content moderators worldwide.

- Meta contended that local courts lack the authority to hear cases against it in jurisdictions where it is not registered. However, Kenya's High Court dismissed this argument in its ruling, according to the Katiba Institute, which served as a plaintiff in the case alongside two Ethiopian researchers.

# Developing Trends In Kenya's Digital Media

## Kenya's Digital Advertising Landscape in 2025

- Information, Communications, and the Digital Economy (MICDE) Cabinet Secretary (CS) William Kabogo launched **Kenya's Artificial Intelligence (AI) 2025-2030 Strategy**, marking a major step in the country's digital transformation journey. The strategy positions Kenya as a regional leader in AI innovation, research, and commercialization, ensuring responsible AI adoption to drive economic growth, job creation, and improved service delivery.

## Social Listening and Real-Time PR

- Crisis communication occurs instantaneously. **Social listening tools** enable PR teams to monitor mentions, sentiment, and emerging issues as they develop. This ability allows brands to respond swiftly and strategically, significantly improving their online reputation management.

## Kenya Ranked as World's Fastest Growing Internet Advertising Market

- According to the latest PwC Africa Entertainment and Media Outlook 2024–2028 report, Kenya's entertainment and media (E&M) industry is projected to grow at a compound annual growth rate (CAGR) of 5.2%, surpassing pre-pandemic levels and positioning the country as one of the key players in Africa's digital economy.

- The most remarkable aspect of the digital media boom in Kenya is the rapid growth in internet advertising, projected to grow at a world-leading CAGR of 17.4% through 2028. The two other E&M markets projected to grow as fast in Africa are South Africa and Nigeria at 4.2% and 8.6%, respectively.

# Latest Trends In Kenya's Digital Media

## Youth Activism & Digital Resistance

- Kenya's youth, especially Gen Z, has increasingly turned to satire, memes, and viral campaigns to challenge political authority. This digital activism reached a peak amid protests and dissent, with authorities responding with force and censorship attempts, such as media blackouts. Yet, online community-led efforts often forced transparency and offered solidarity for detained activists.

- In the wake of the violent crackdown on protests, Kenya's youth has increasingly turned to digital dissent.

- **On 17 January**, Kenya's Ministry of the Interior issued a directive demanding that social media firms set up offices in the country "to ensure responsibility and accountability in the face of rising disinformation, social media manipulation and online abuse".

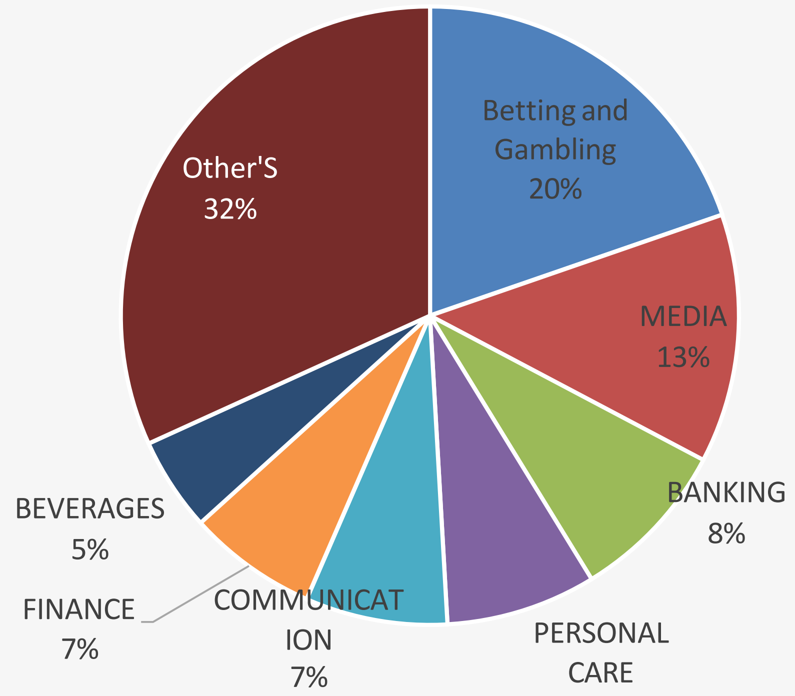
- The government directed all social media companies operating in Kenya to **establish physical offices** within the country. The move, announced by Interior Principal Secretary Raymond Omollo on Thursday, is aimed at enhancing accountability in light of increasing concerns over disinformation and online abuse. In his statement, Omollo stressed that the directive also compels telecommunications providers and platform owners to take stronger measures against harassment, hate speech, and incitement to violence.

- The Kenyan government would later **soften their stance**.

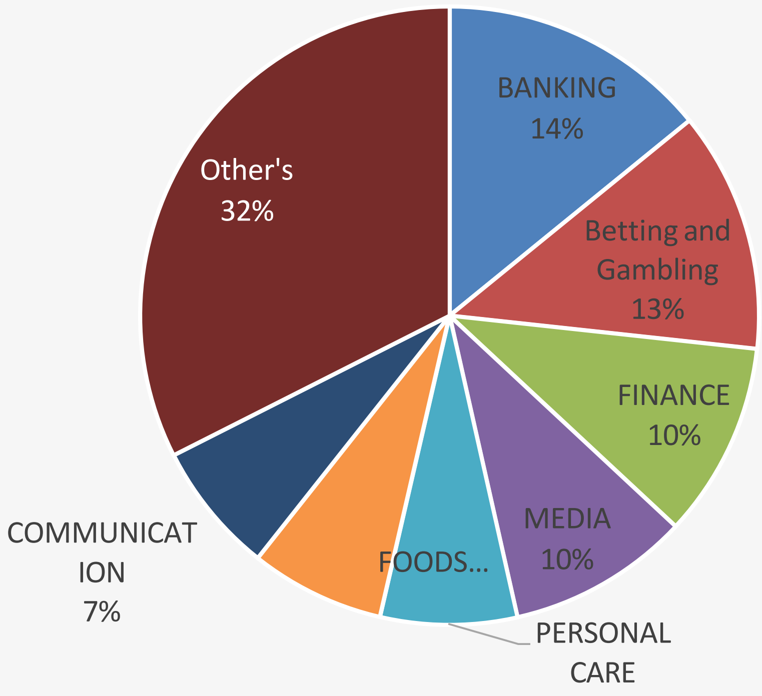
# Electronic Media Advertising Trends Overview

# Share of Industry Advertising

Top industries H1 2024 [KSH's 39.3B]




Top Industries H1 2025 [KSH's 28.6B]




- In the first half of 2025, the banking industry led advertising expenditures at 14%, overtaking the betting and gambling sector, which had dominated in early 2024. This change was due to strict advertising regulations and a one-month advertising ban in April.

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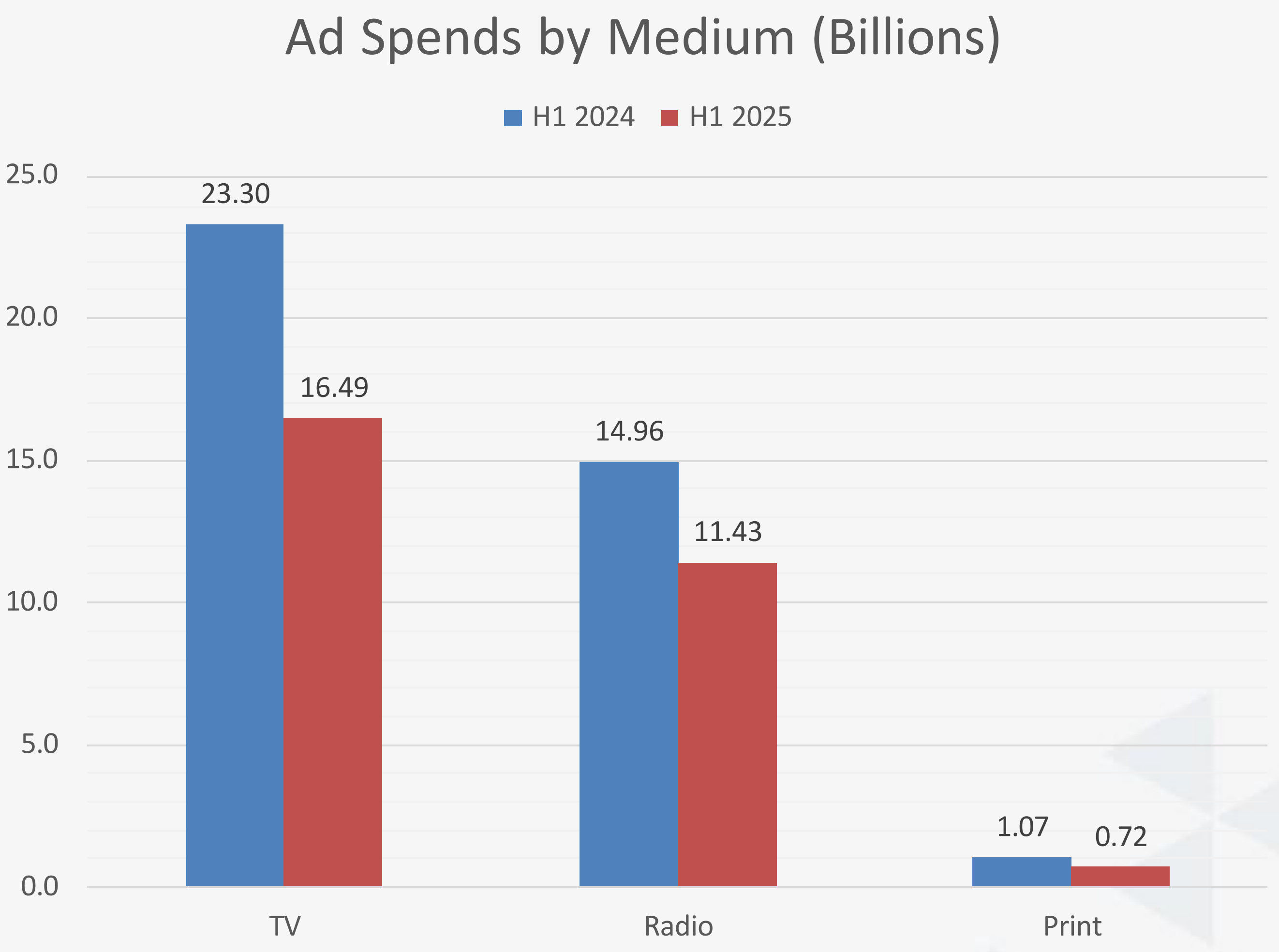
# Media Channel Advertising Performance – H1 2025

In H1 2025, total ad spending decreased by 27% compared to the same period in 2024.

- This decline was attributed to reduced expenditures across all media, with TV, Radio, and Print experiencing drops of 29%, 24%, and 32%, respectively.

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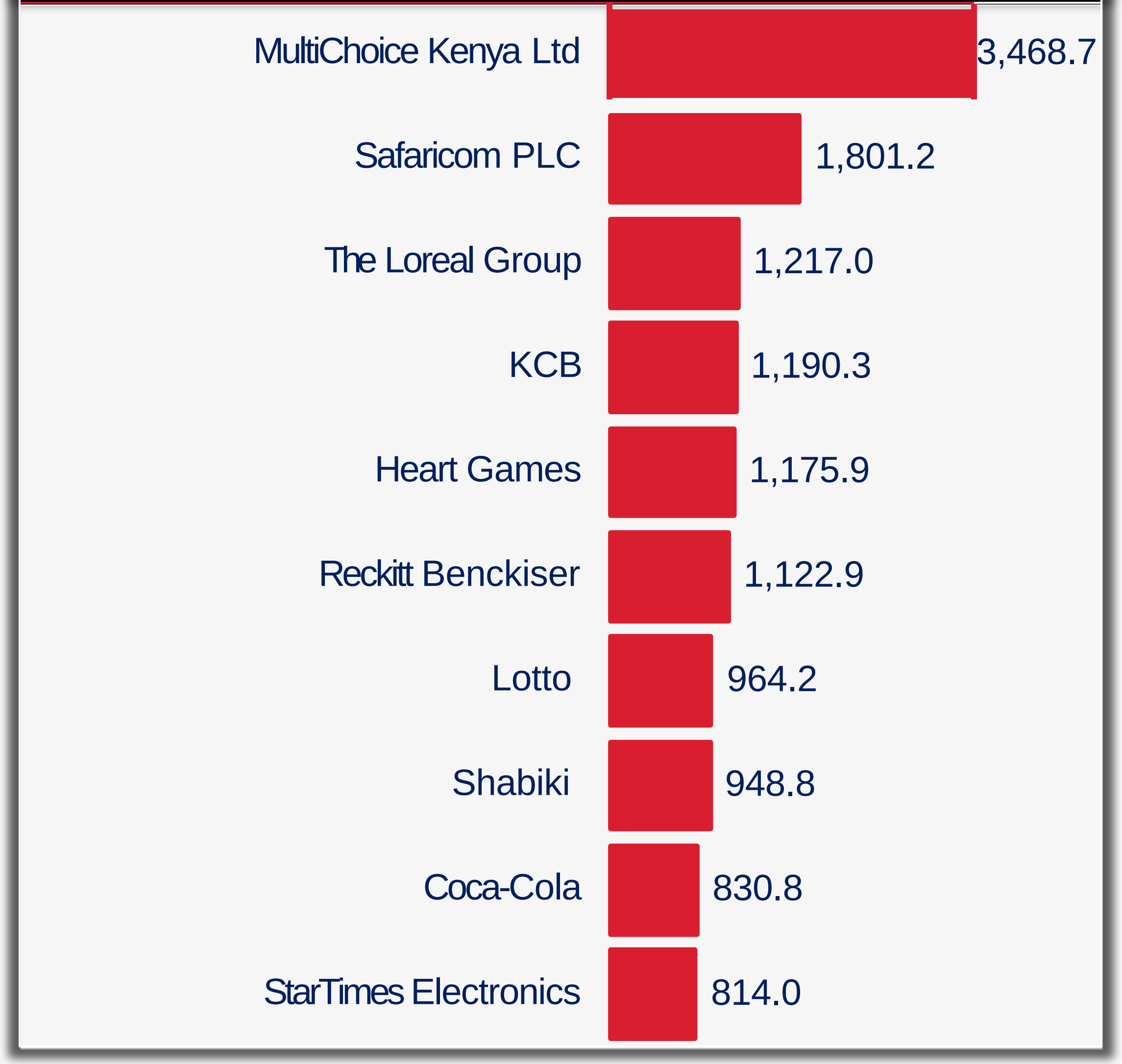
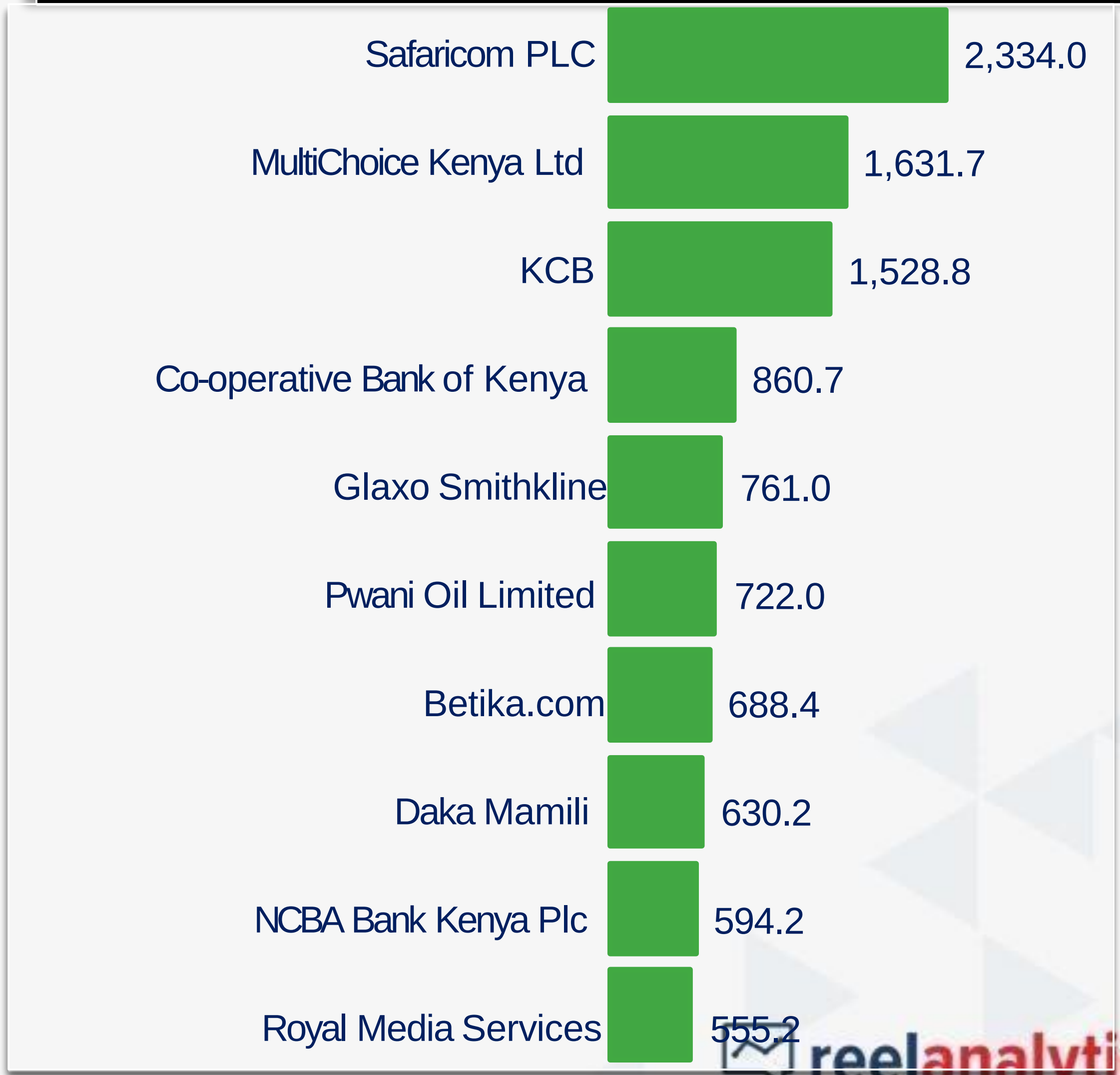
# Top Advertisers(Companies) – H1 2024 Vs 2025

## Top 10 Companies (Millions) – H1 2024



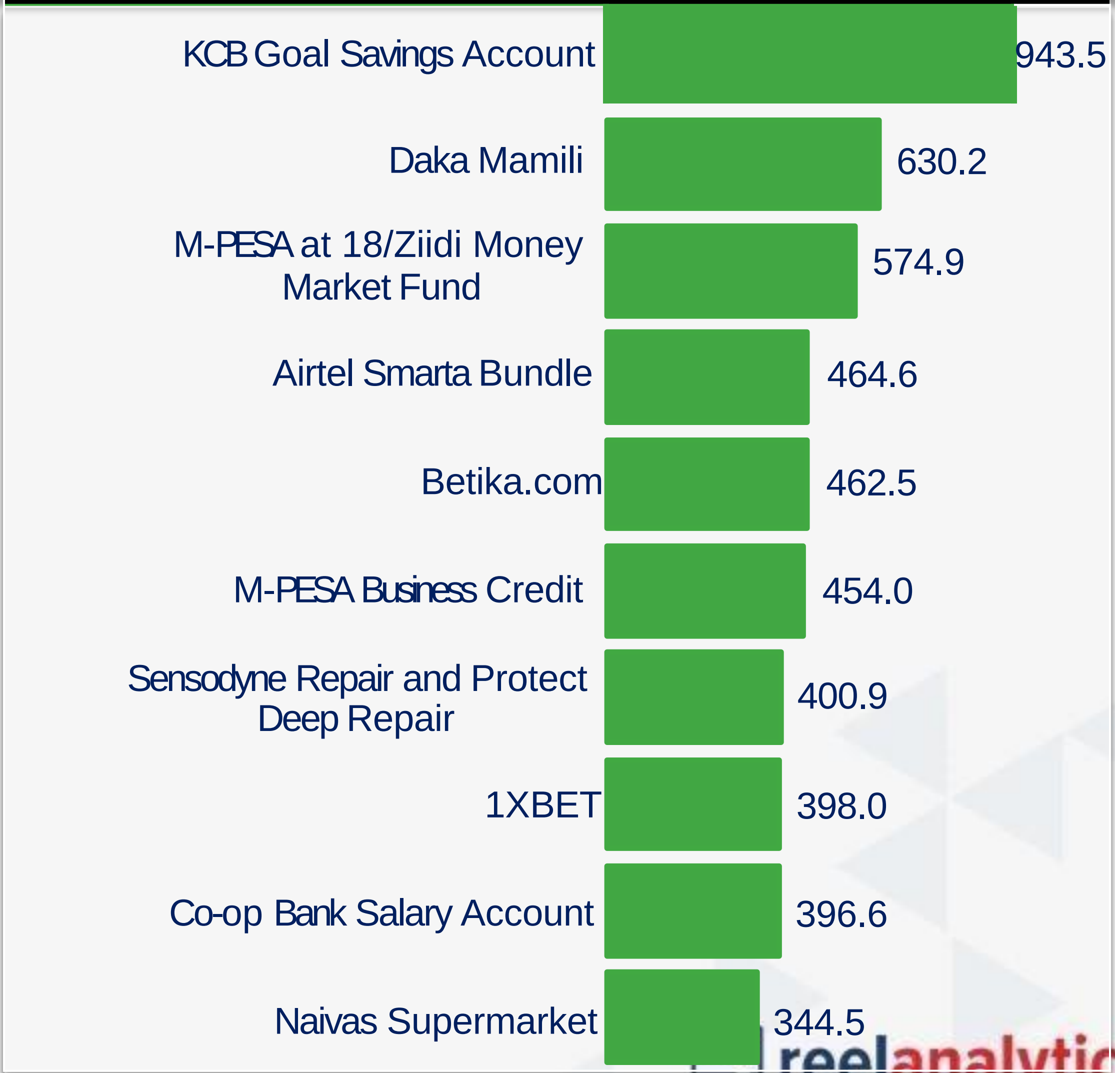

## Top 10 Companies (Millions) – H1 2025



# Top Advertisers(Campaigns) – H1 2024 Vs 2025

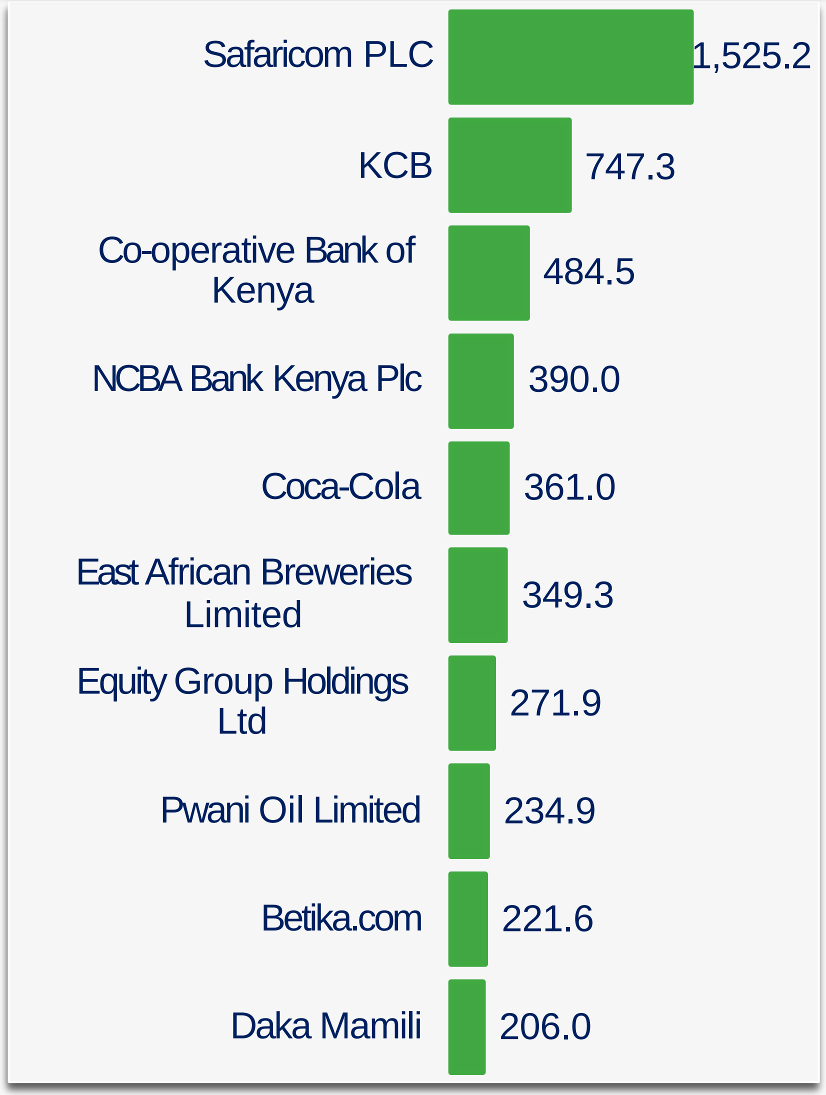
## Top 10 Campaigns (Millions) – H1 2025


## Top 10 Campaigns (Millions) – H1 2025

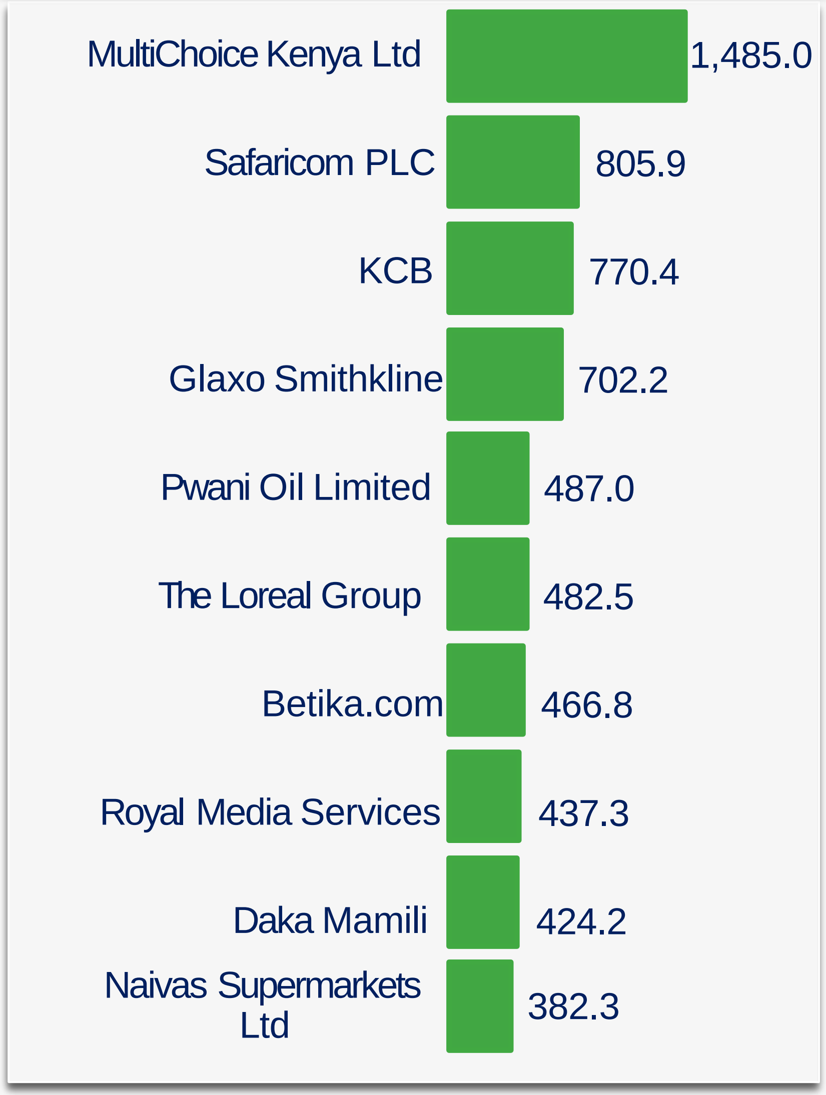


# Top Advertisers By Medium – H1 2025

## Top 10 Radio (Millions) – H1 2025



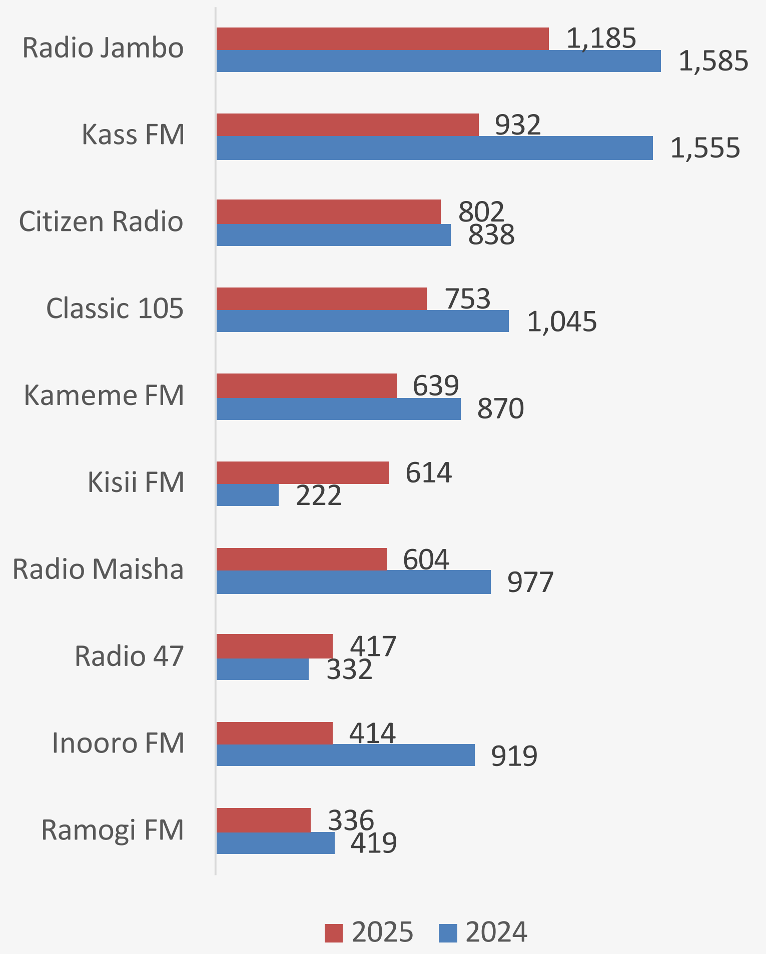

## Top 10 TV (Millions) – H1 2025



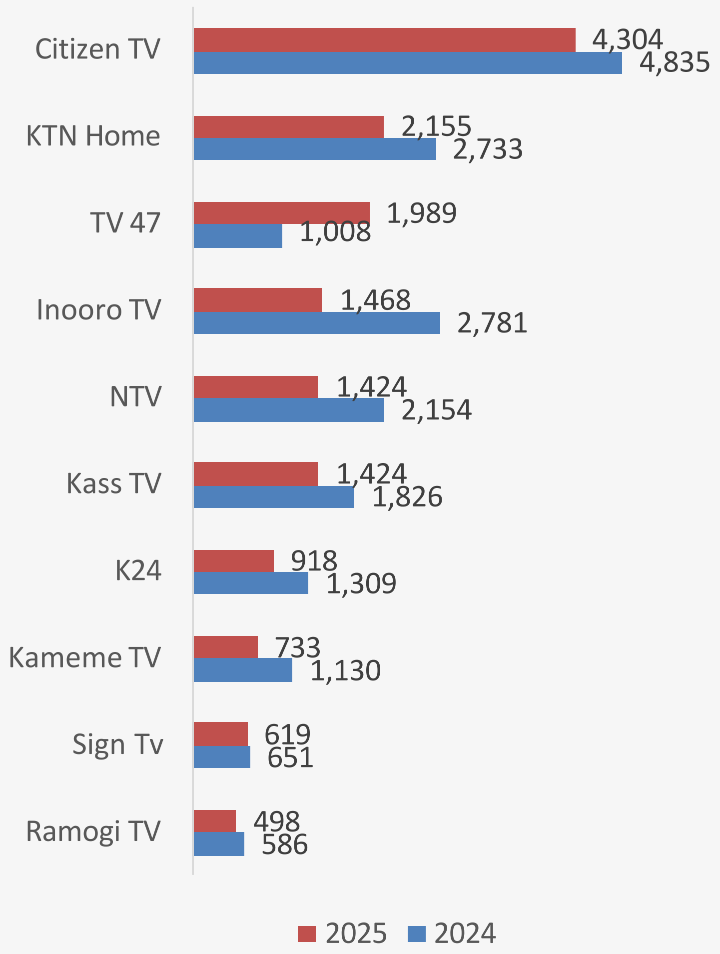

## Top 10 Print Advertisers (Millions) – H1 2025

# Media Channel Advertising Performance By Ad Revenue

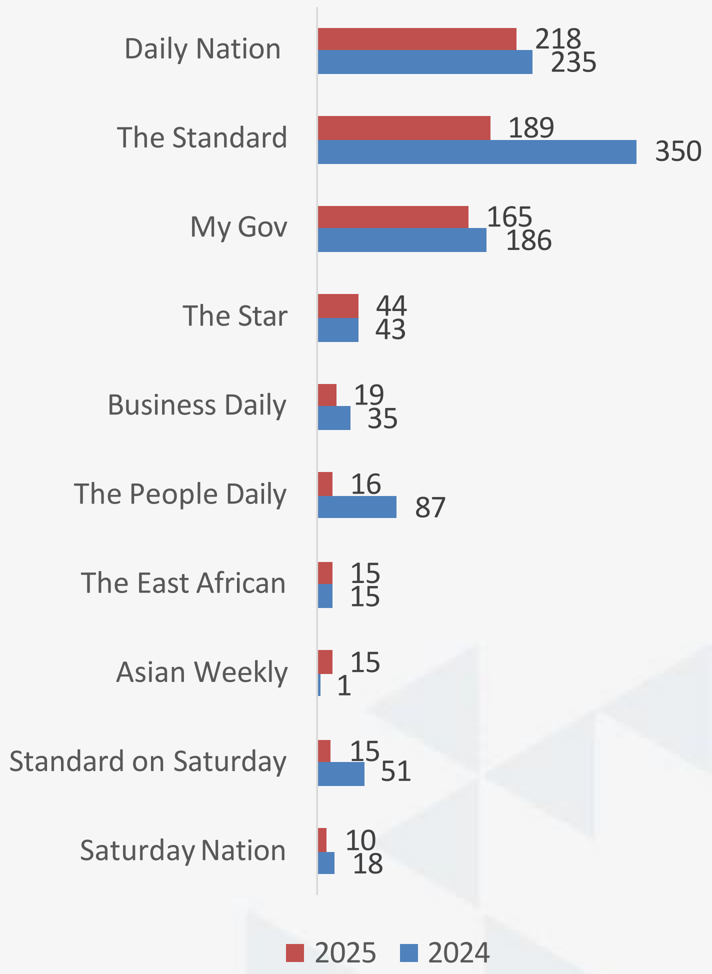
## Top 10 Radio Channel By Revenue(millions)




## Top 10 TV Channel by Revenue(Millions)




## Top 10 Print Publication By Revenues(Millions)




Despite the overall decline in advertising revenue across major publications, Kisii FM, Radio 47, TV 47, The Star, and the Asian Weekly reported higher ad revenues in 2025 in comparison to the same period in 2024.

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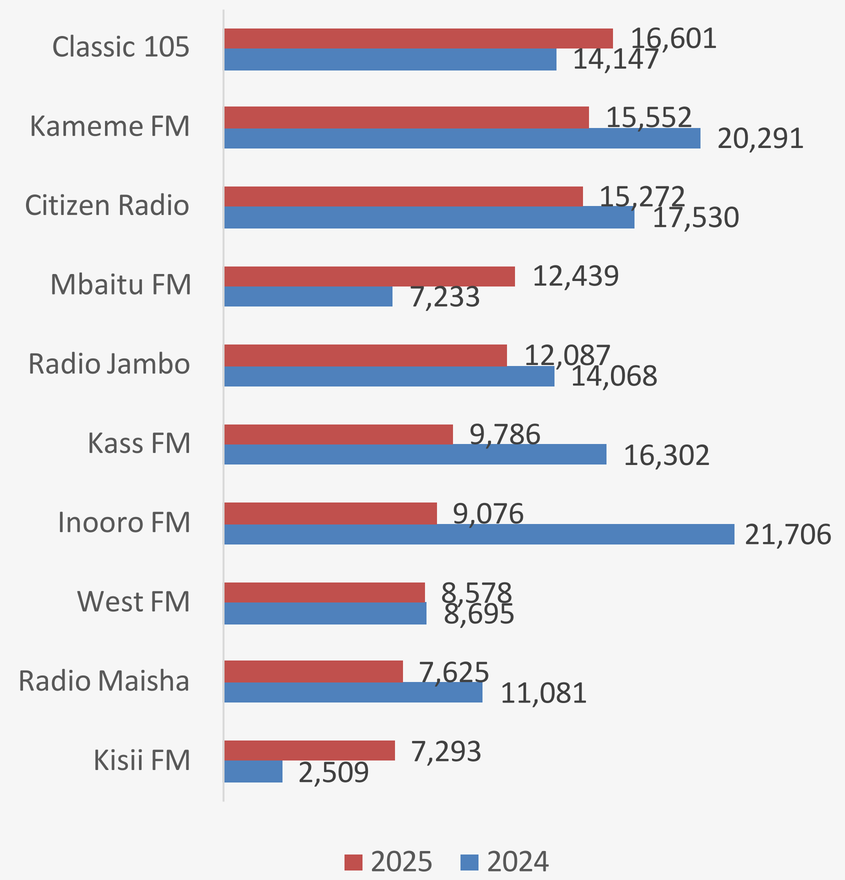
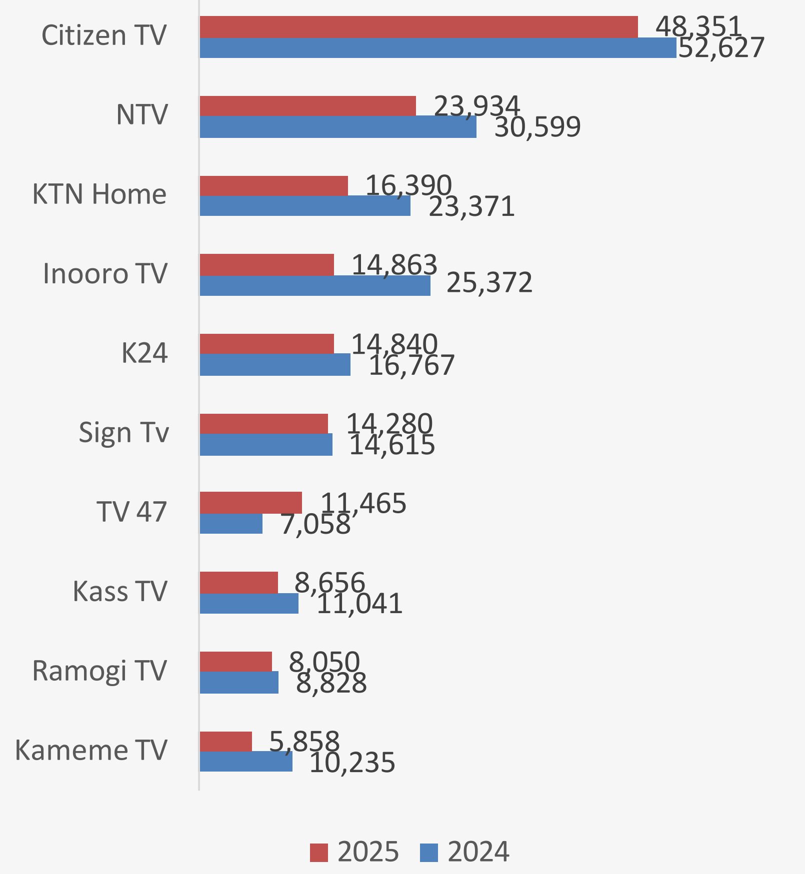
# Media Channel Advertising Performance by Ad Volumes

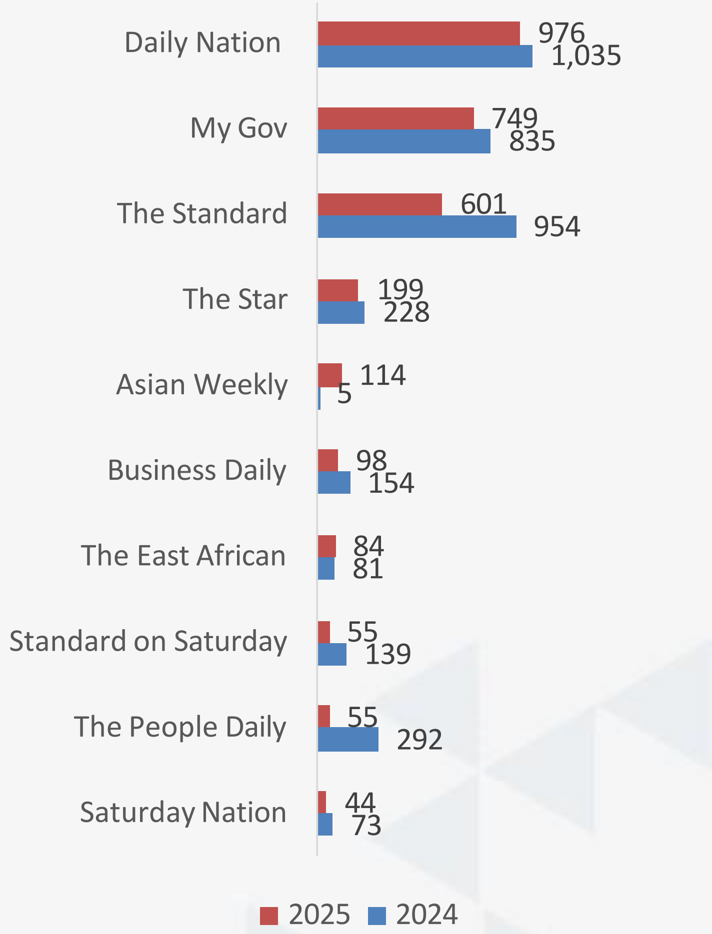
## Top 10 Radio Channel By Ad Volumes




## Top 10 TV Channel by Ad Volumes




## Top 10 Print Publication By Ad Volumes




In 2025, there was a noticeable decline in advertising activity compared to 2024, primarily due to stricter advertising regulations implemented for the Betting and Gambling sector.

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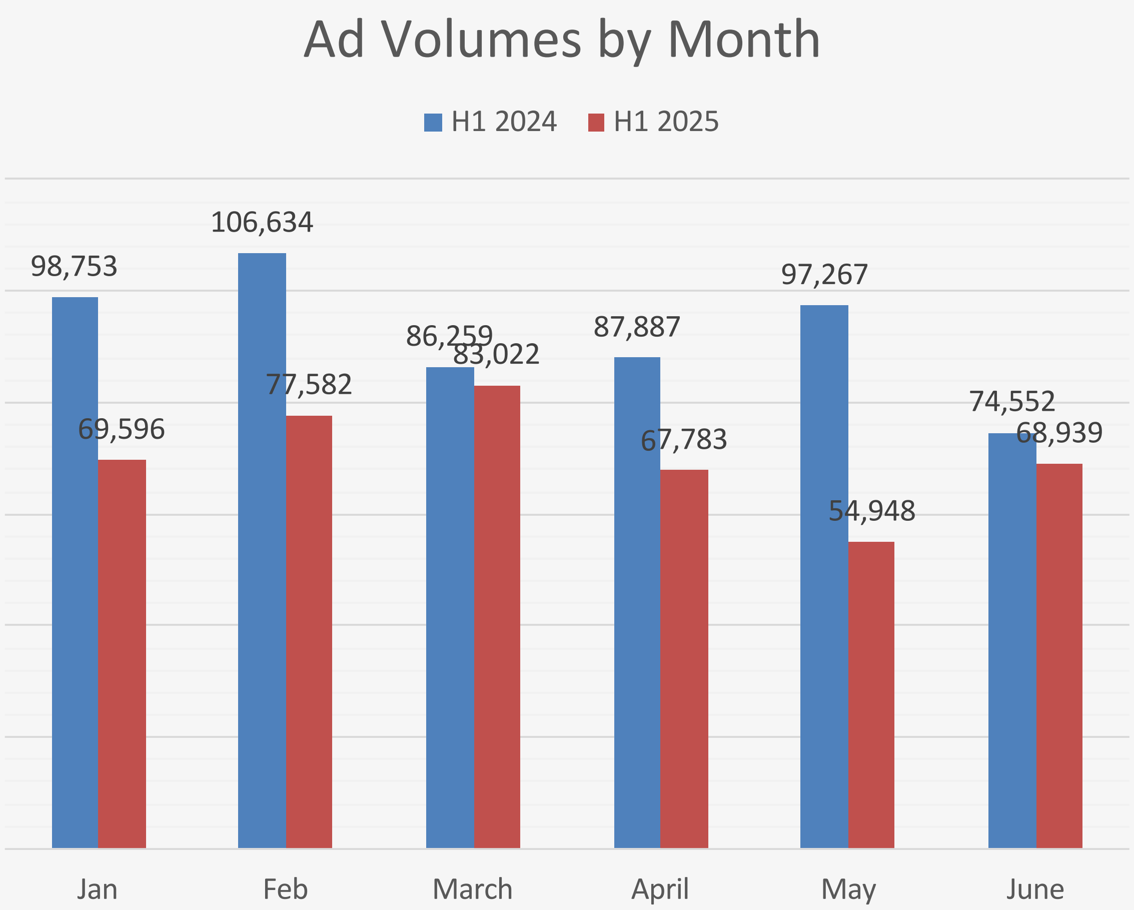
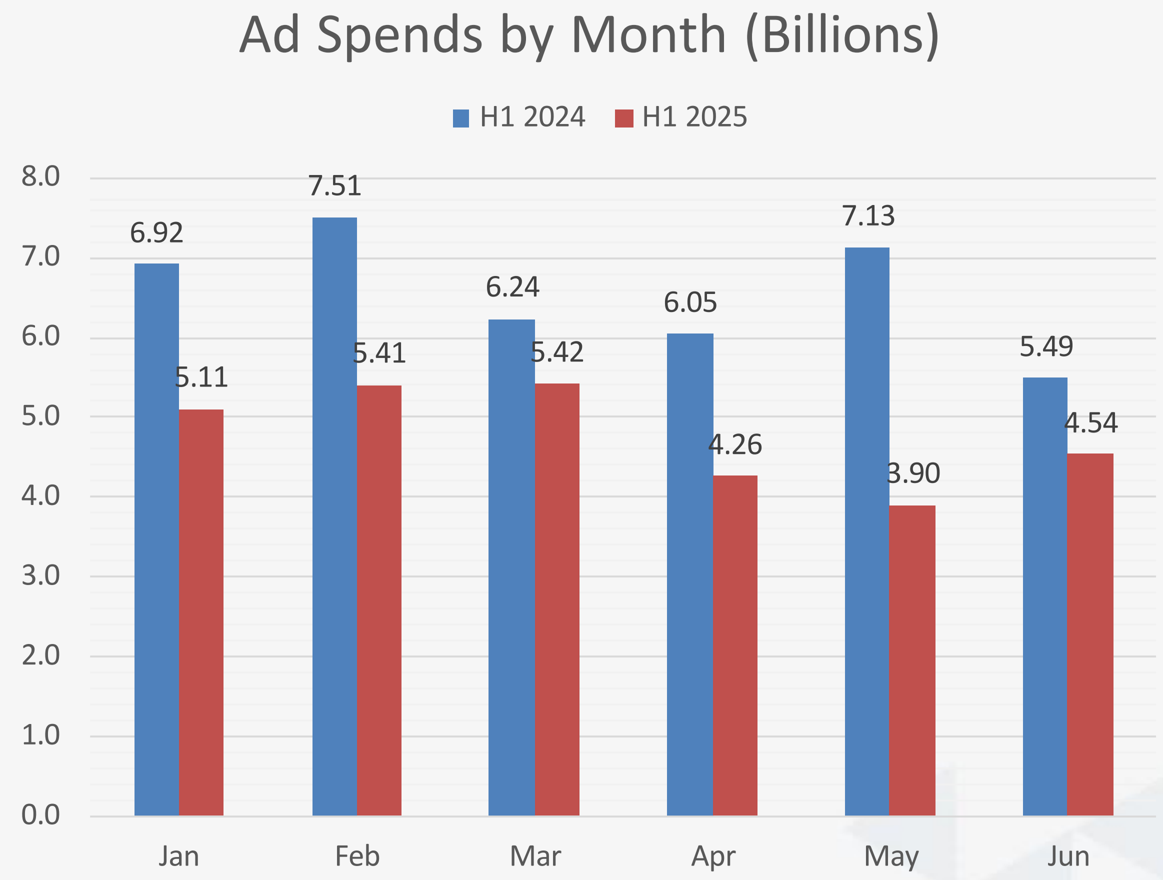
# Trended Advertising Activity by Month




Throughout the first half of 2025, all months showed a decline in advertising activity compared to the same periods in 2024. They generally exhibited a similar trend, with May 2025 experiencing the steepest drops: a 44% decrease in ad volumes and a 45% reduction in ad spending, largely attributed to a one-month ban on advertising in the Betting and Gambling industry.

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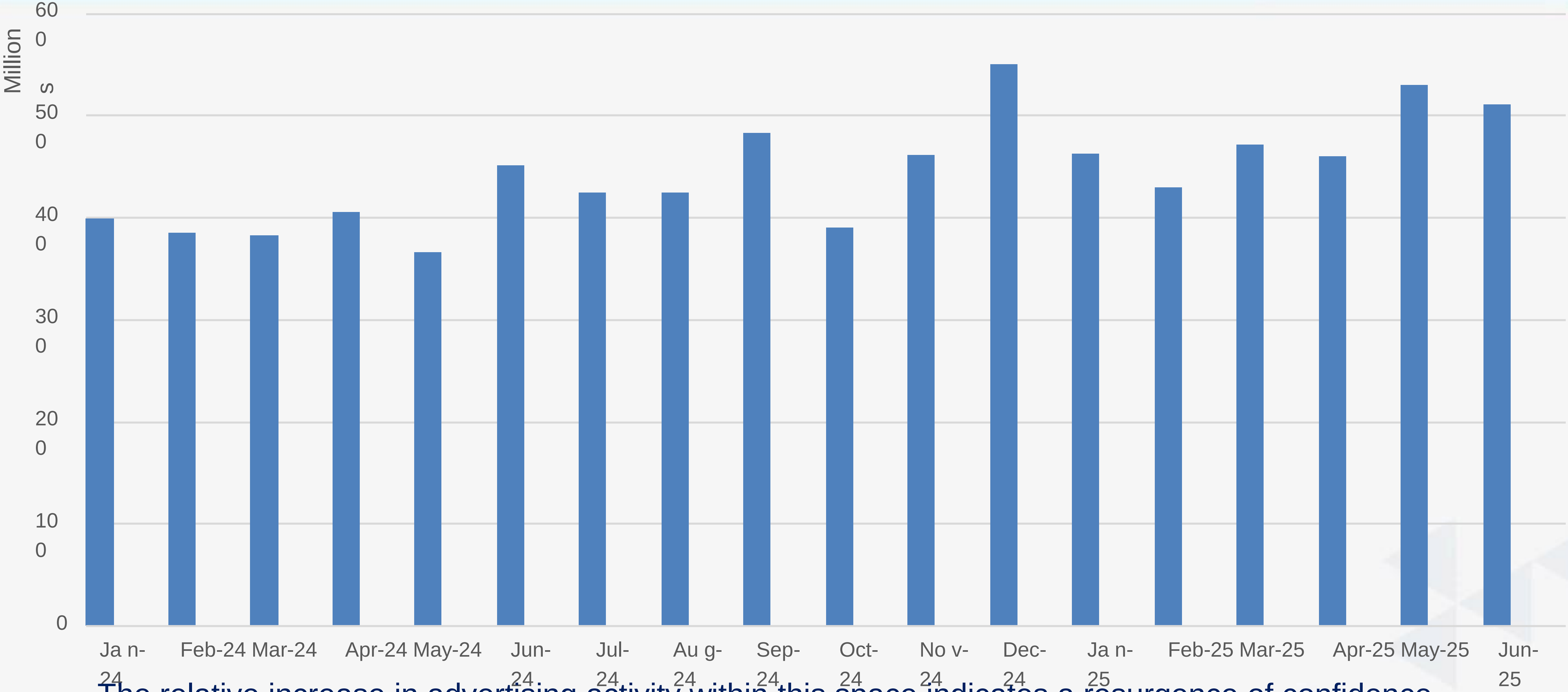
# Out-Of-Home Advertising Trends Overview

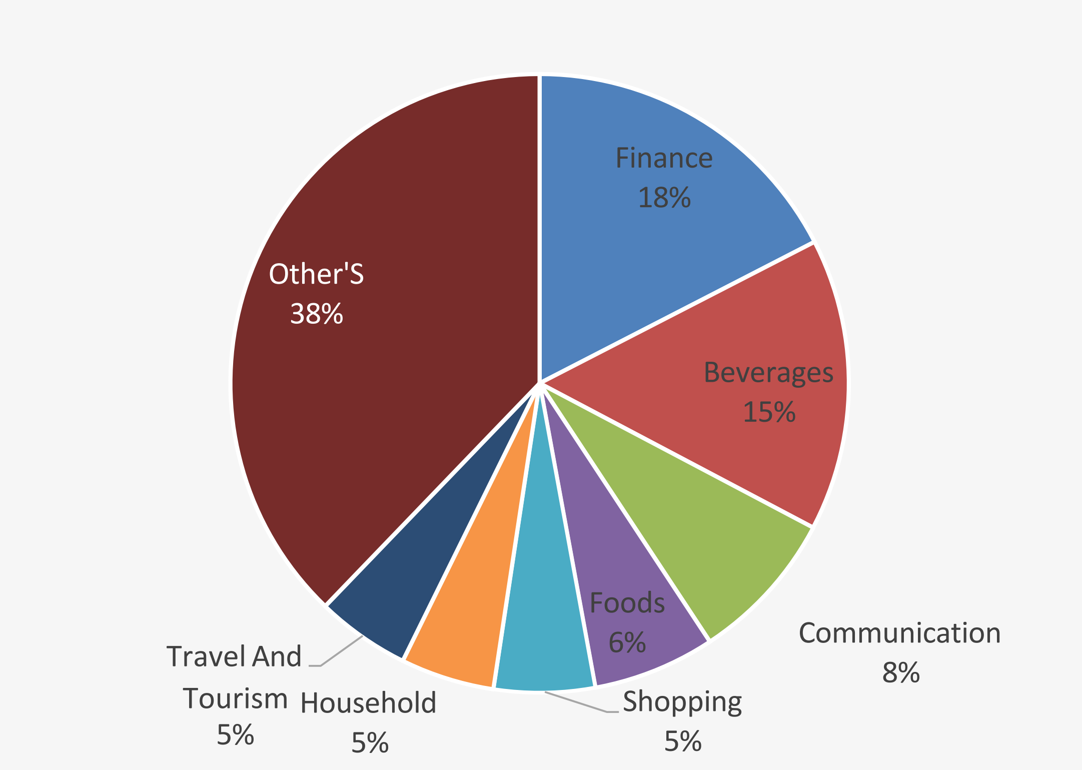
# Trended Ad allocations



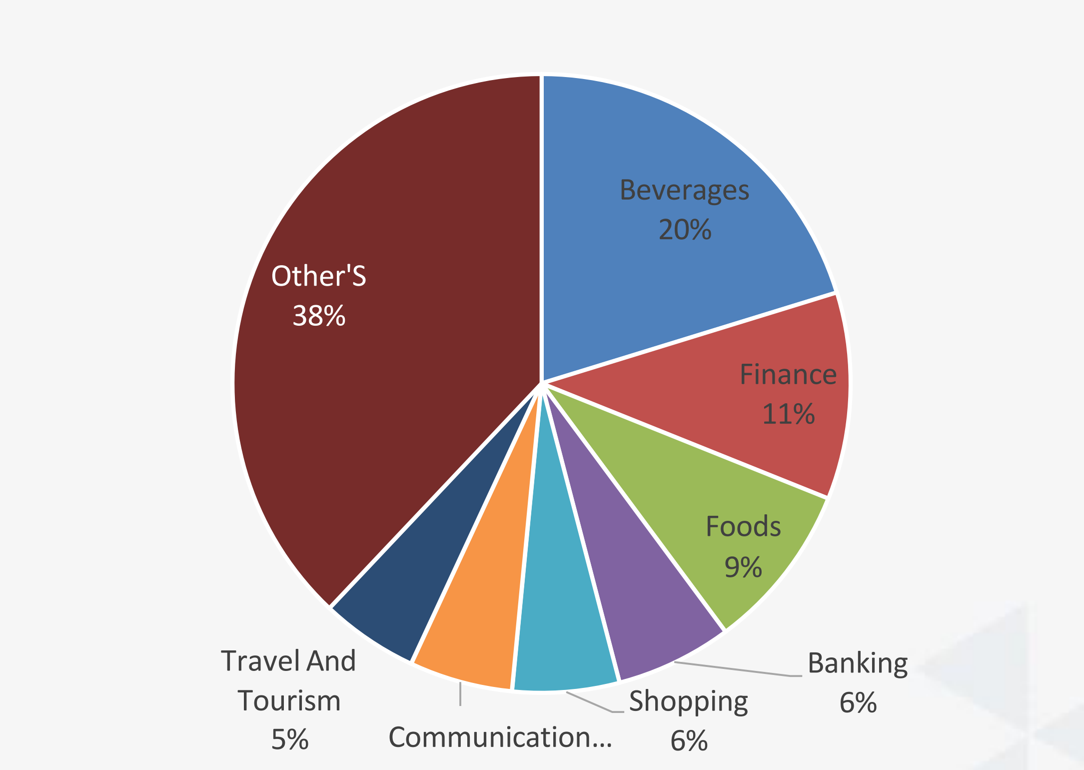

- The relative increase in advertising activity within this space indicates a resurgence of confidence in the medium. As we move into Q4, a competition for high-value media slots is expected.

# Exposure by Industry

## Top industries H1 2024 [KSH’s 2.4B]



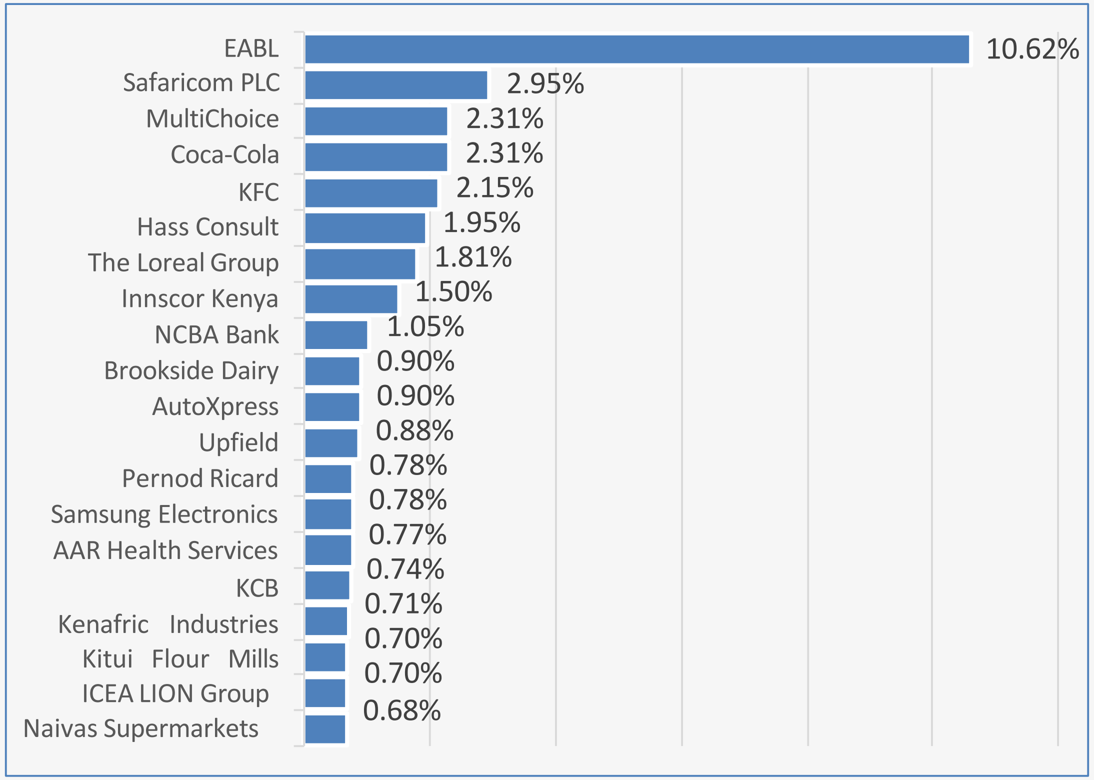

## Top Industries H1 2025 [KSH’s 2.9B]



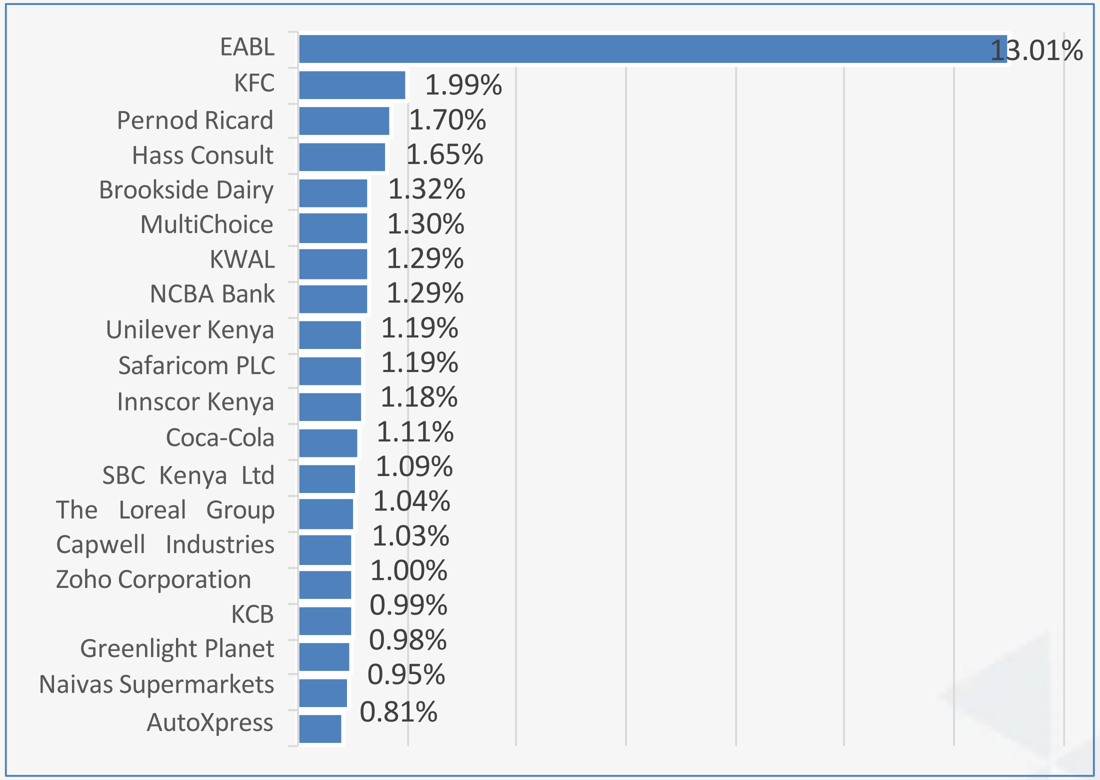

- The beverage sector continues to be one of the strongest advertisers on OOH, driven primarily by alcoholic brands. However, non-alcoholic players such as Coca-Cola and SBC also sustained significant visibility, reinforcing the category’s dominance on the medium.

# Top Advertiser’s

## Top Companies H1 2024 [KSH's 2.4B]




## Top Companies H1 2025 [KSH’s 2.9B]




- 2025 observed flexible DOOH buying patterns, campaigns are now scheduled to run during specific time segments instead of throughout the entire day.
- Competition on prime corridors has intensified, with advertisers increasingly opting for long-term holds to secure consistent visibility and outpace rivals.

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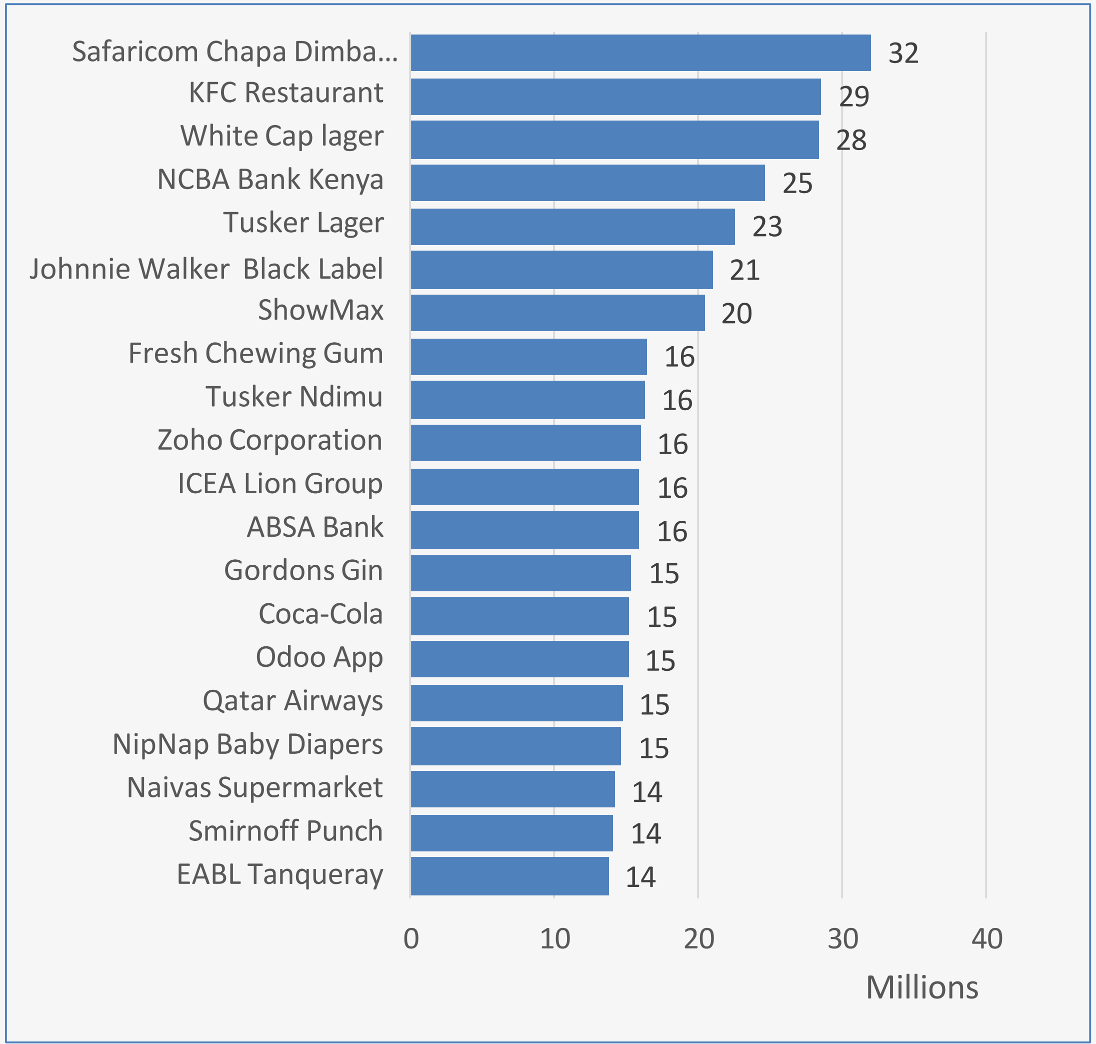
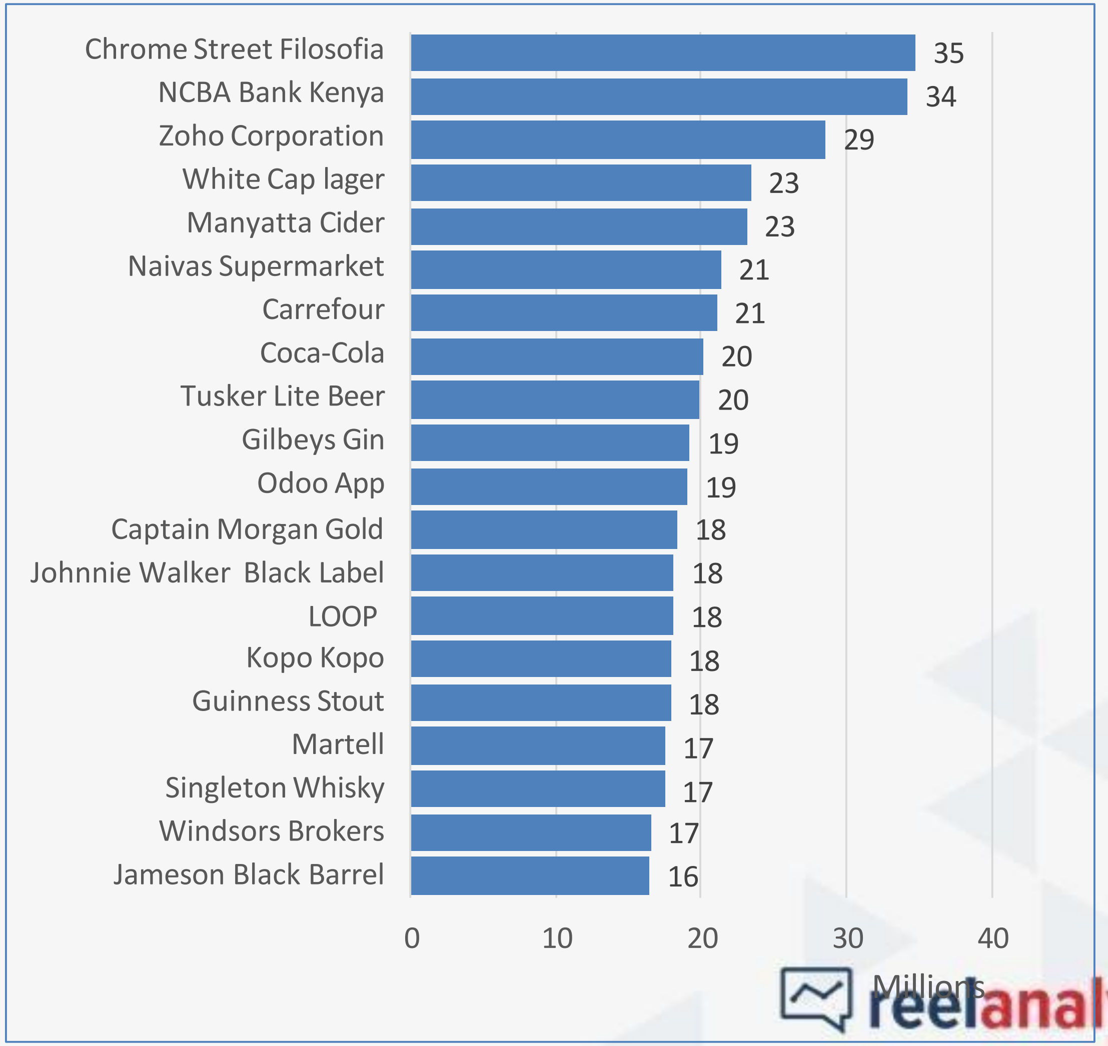
# Top Campaign’s

## Top Campaign’s H1 2024




## Top Campaign’s H1 2025

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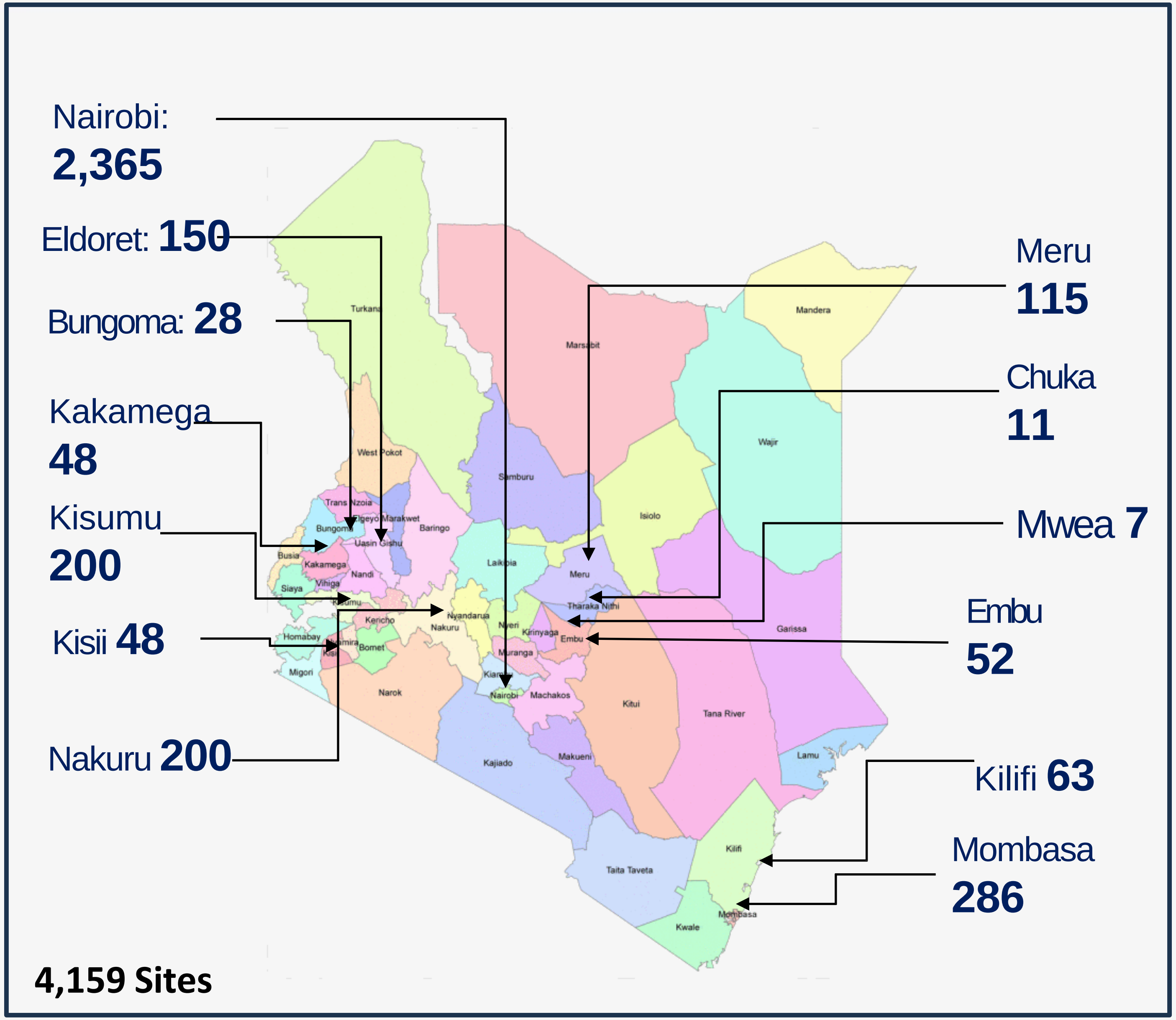
# Large Format Sites Distribution Nationally




- Small-format assets remain highly flexible, as they can be quickly deployed at chosen locations and easily relocated. At the same time, digital screens have seen consistent growth nationwide, with small vertical formats carving out a strong niche in malls, retail outlets, and commercial as well as residential buildings across Nairobi

Reelanalytics provides actionable insights to brands and organisations to improve their brand and communication strategies.

We empower brands to measure the real impact of their media investments through accurate, real-time, and unified reporting eliminating assumptions and enabling confident, data-driven decisions.

## Our Markets

Kenya Uganda Cameroon Malawi Somalia

## Get In Touch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