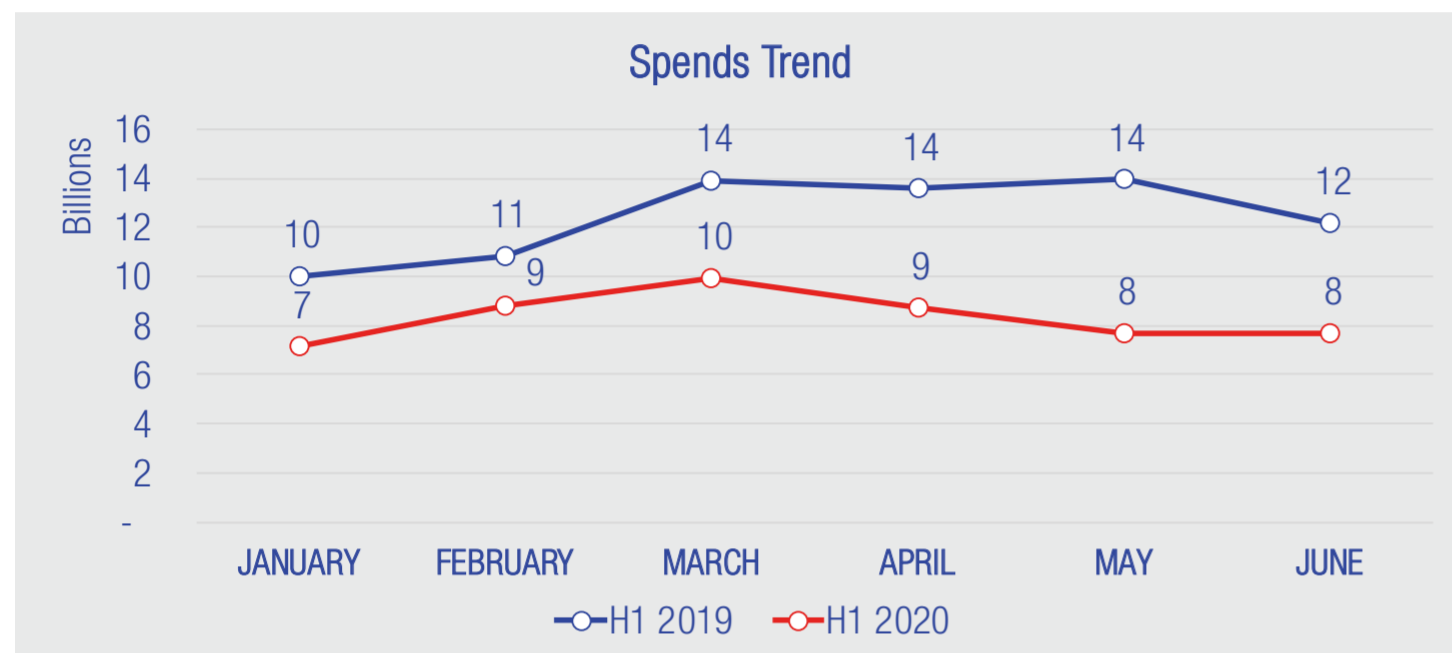


An Overview of the Total Advertising Industry Media Activities in Kenya



TOTAL INDUSTRY ADSPEND



-33%
Total industry spends for H1 2020 decline compared to H1 2019

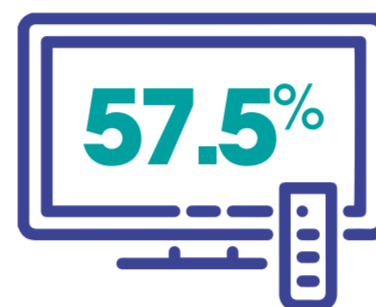
285%
Increase in the Pharmaceuticals sector driven by Covid-19 awareness campaigns with major sponsors being The World Health Organization and the Government of Kenya.

NOTE: Before the 1st case of Covid-19 in Kenya, the industry spends were still trending below same period last year.

All other sectors had a decline.

H1 SPENDS
2019 74,527,769,758
2020 50,022,462,824

MEDIA DISTRIBUTION OF SECTOR SPENDS



TV continues to lead in terms of share with about 57.5% with majority of sectors investing their budgets here.

Despite that sectors like Financial services and agriculture on the other hand had majority of their spends on radio

NEWS
3.8B

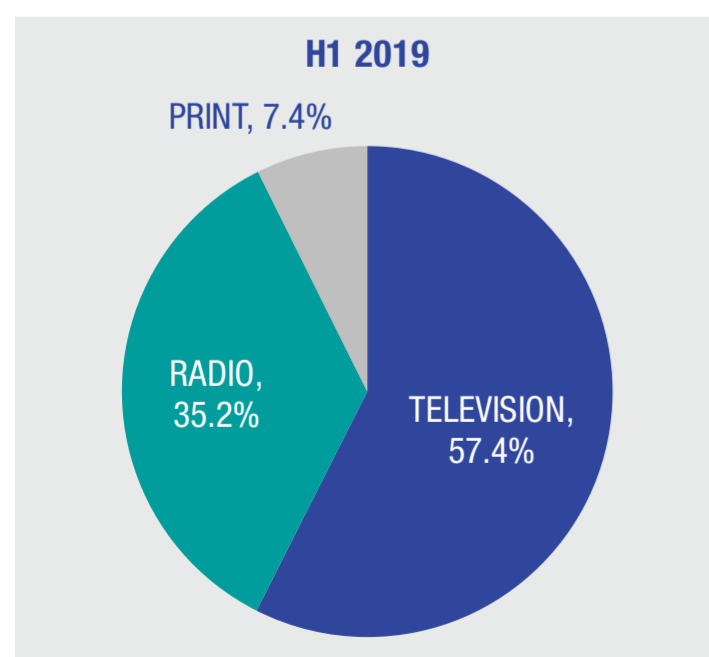
By end of H1, TV had 28.7B, radio with 17.4B and print continues to decline and had a total of 3.8B

Sectors	TELEVISION	RADIO	PRINT	Grand Total
Communications	4,173	4,408	111	8,691
Pharmaceuticals	5,196	2,905	63	8,163
Media	4,802	1,378	1,400	7,580
Corporate & Multibrand	2,523	1,162	1,198	4,883
Financial Services	1,394	1,880	369	3,643
Betting & Gaming	1,787	1,318	78	3,182
Personal Care	2,777	232	4.8	3,015
Household	1,673	265	27	1,966
Beverage	1,135	636	17	1,788
Publishing & Education	949	578	163	1,691
Veterinary & Agriculture	260	1,219	24	1,503
Foods	772	527	30	1,328
Property & Building & Acc.	866	275	147	1,288
Transport	160	262	84	506
Tourism & Entertainment	215	137	64	416
Retail	49	238	33	320
Clothing, Fabrics & Footwear	21	10.3	3.4	35
Office Equipment & Services	8.7	12.4	3.2	24
Grand Total	28,759	17,443	3,820	50,022

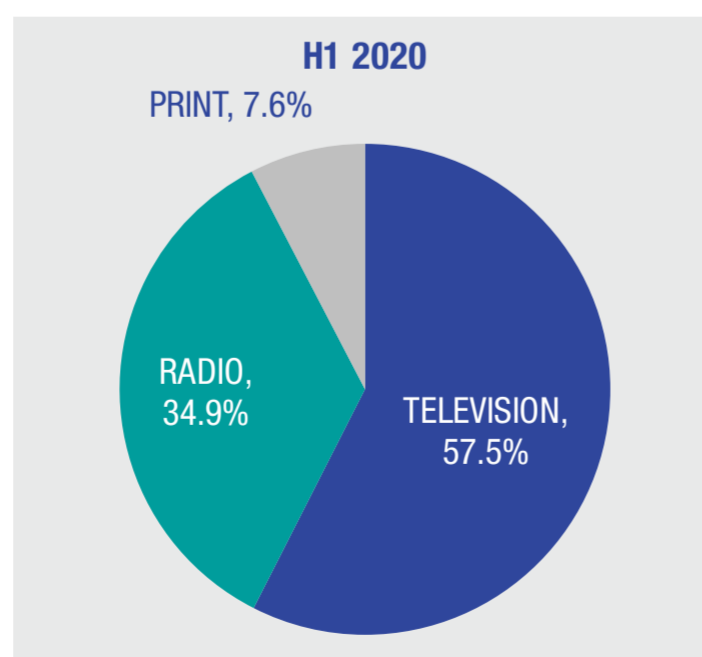
H1 Spends in Kshs Millions

TOTAL INDUSTRY DISTRIBUTION BY MEDIA

The medium split have not changed to the same period last year (Jan to June)



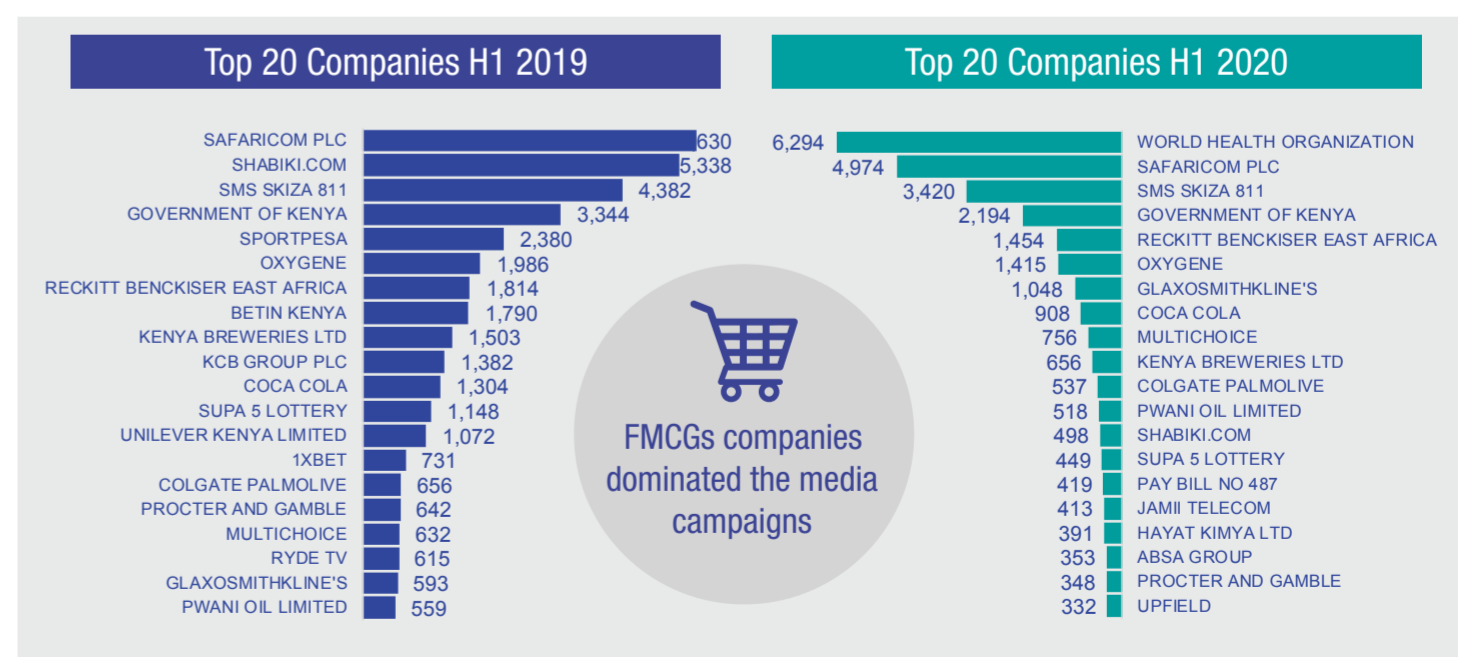
Total Spends: 74,527,769,758



Total Spends: 50,022,462,824

INDUSTRY EXPOSURE RANKING

Safaricom continues to dominate in media exposure 2nd after the Covid-19 campaign awareness.



Spends in Kshs Millions