

# INDUSTRY OVERVIEW

## An overview of the total advertising industry

IPSOS AUDIENCE MEASUREMENT

2022 events will impact advertising positively or negatively. The main events revolve in;



Politics (pre & post elections)



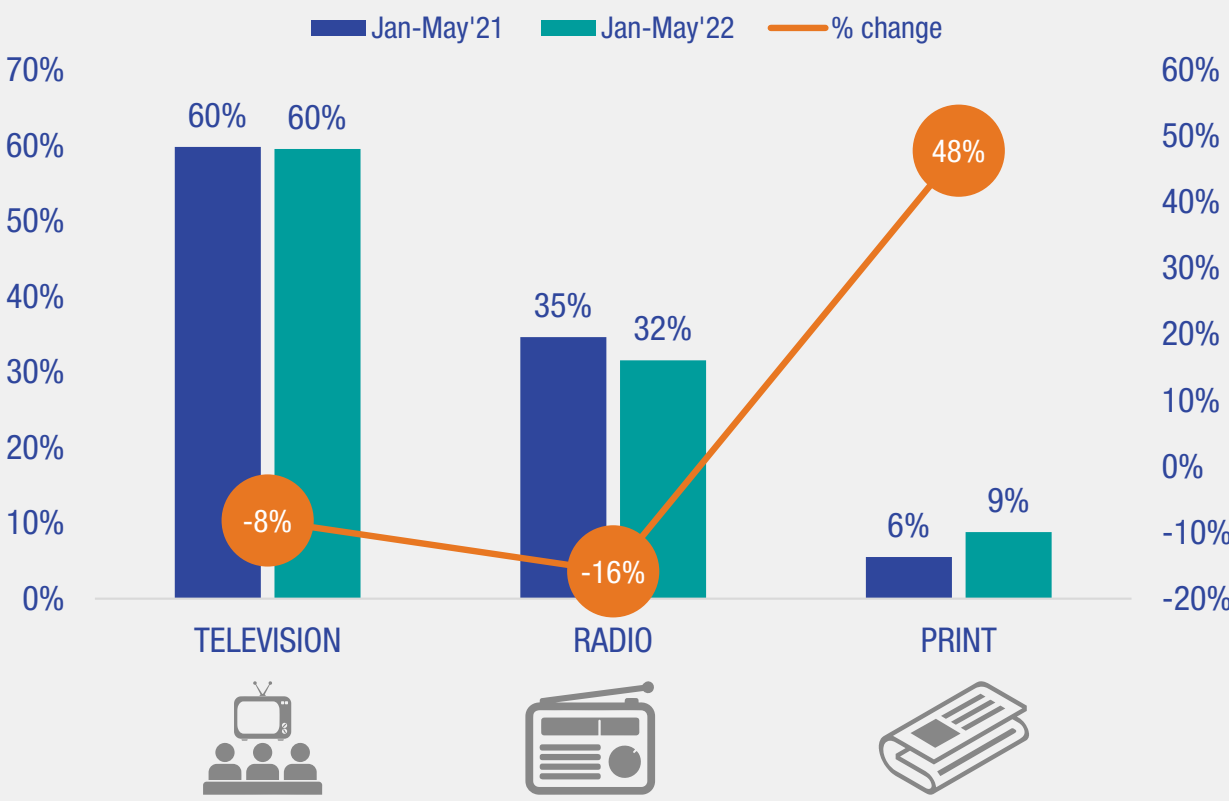
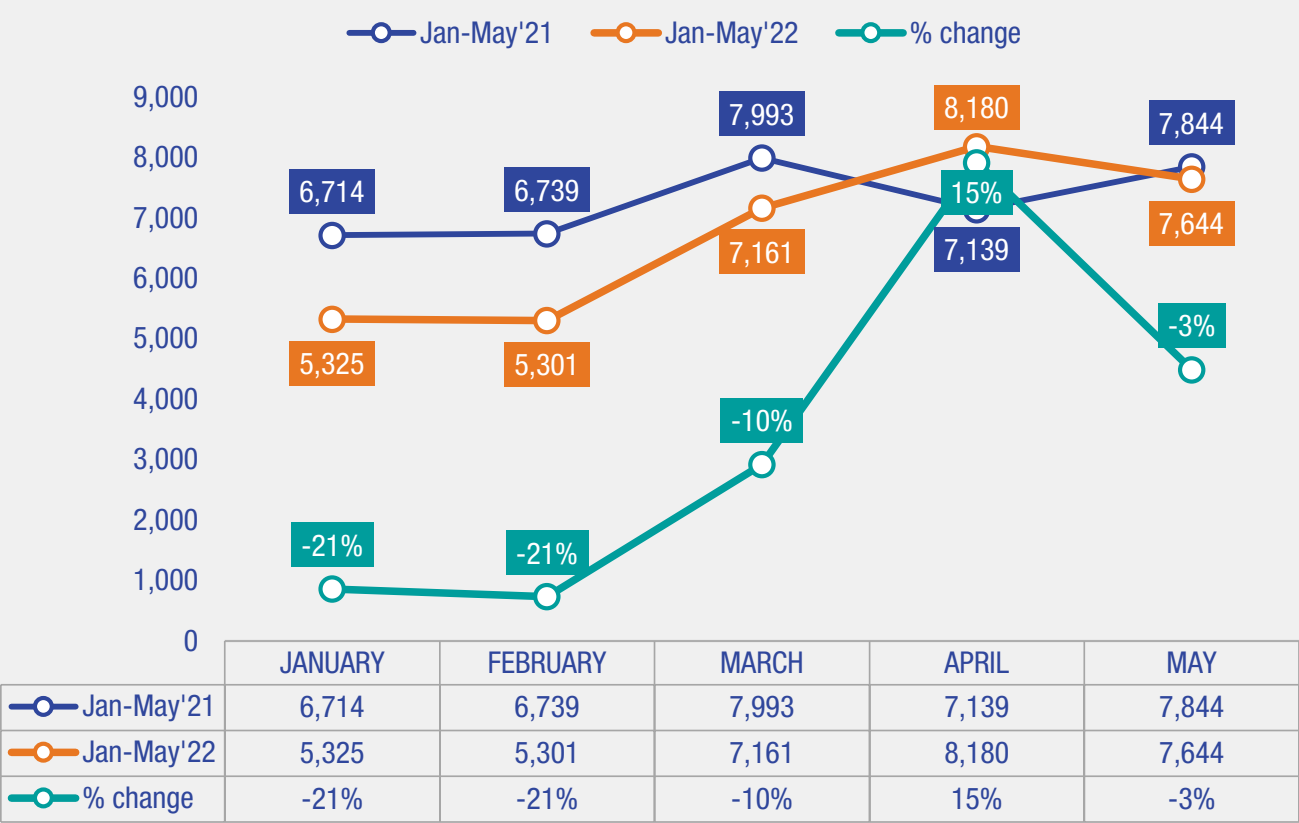
Education (national exams)



Sports (WRC, Fifa World Cup)

Despite the high rate of inflation, advertising budget seem to have a minimal change 2021 vs 2022 month on month, with only April 2022 being the month with higher spends than 2021. The rest of the months spent lower than 2022, January and February had the lowest drop

On Media spending, television spends share was same in the two periods (60%) as radio dropped by 3%. Advertisers seem to appreciate print media in 2022, with a 48% up from 2021

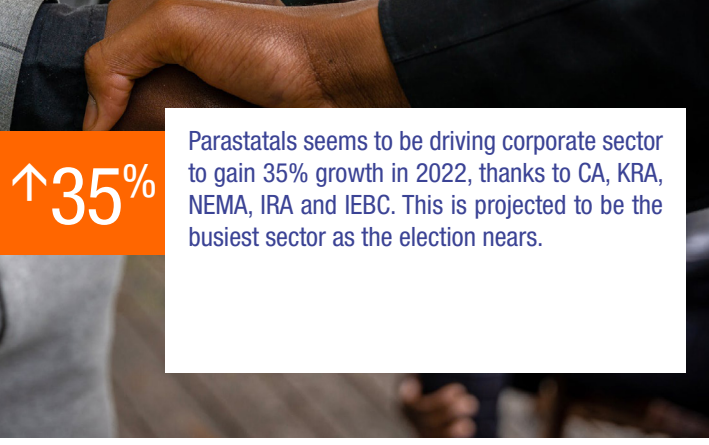


### SECTOR SHARE OF SPEND

Advertising land scape continues to drop in 2022 compared to the same period in 2021(-8%). With the ever-increasing inflation rate, shopper's continue to shop with caution only to spend on the most essentials.

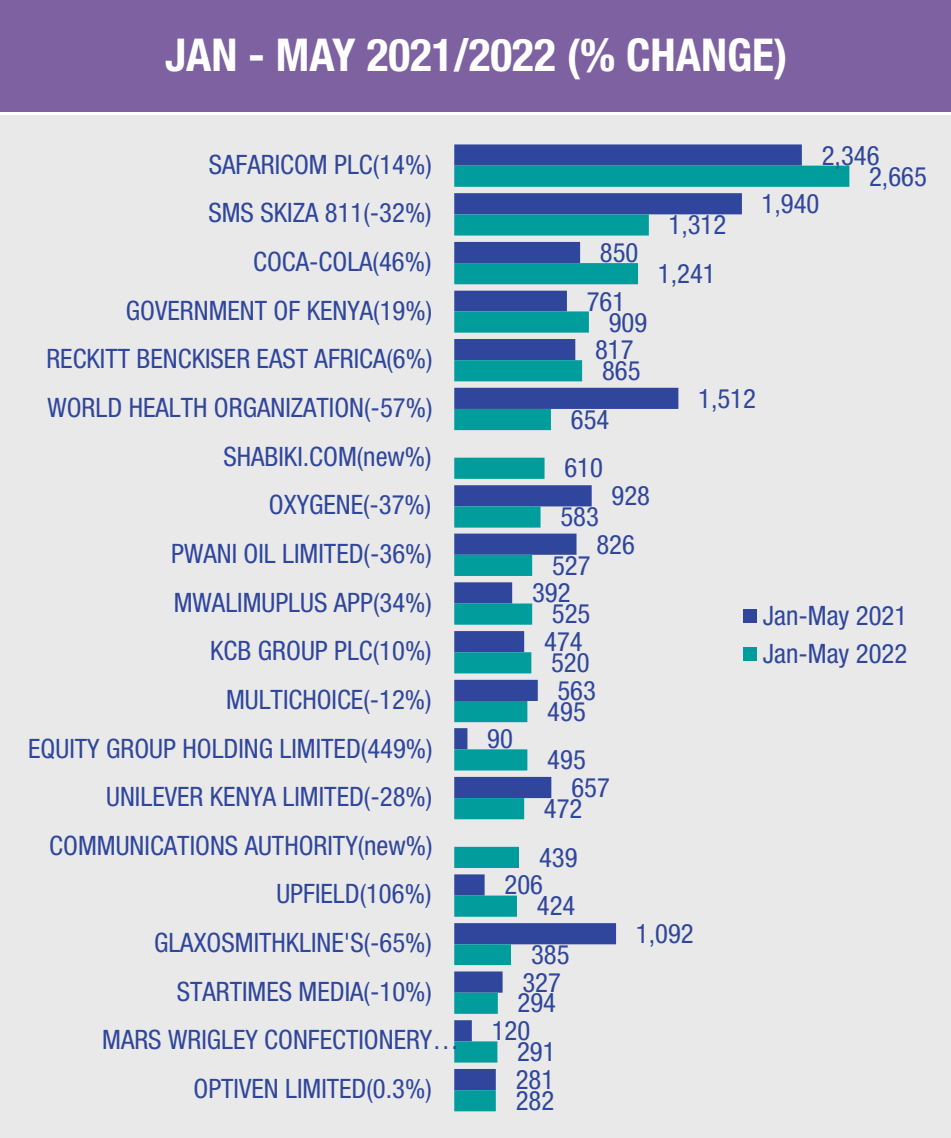
Sector	2021	2022	2022 SOS	% change Jan-May 2021 and Jan-May 2022
Communications	5,185	4,746	14%	-8%
Media	4,620	4,740	14%	3%
Financial Services	2,996	3,596	11%	20%
Corporate & Multibrand	2,541	3,420	10%	35%
Betting & Gaming	2,580	2,778	8%	8%
Property & Building & Acc.	2,181	2,391	7%	10%
Beverage	2,191	1,762	5%	-20%
Household	1,797	1,743	5%	-3%
Personal Care	2,943	1,723	5%	-41%
Foods	2,751	1,350	4%	-51%
Pharmaceuticals	2,715	1,293	4%	-52%
Publishing & Education	973	1,015	3%	4%
Veterinary & Agriculture	1,482	833	2%	-44%
Tourism & Entertainment	284	742	2%	162%
Office Equipment & Services	430	631	2%	47%
Retail	354	428	1%	21%
Transport	347	378	1%	9%
Clothing, Fabrics & Footwear	60	40	0%	-32%
Grand Total	36,429	33,610		-8%

Spends in Kshs Millions



### TOP SPENDERS 2021/ 2022 COMPARISON

Media exposure steadily decline month on month even though perennial top spenders are still dominantly loud owing to their diversified portfolio of products. Safaricom has grown by 14% driven by a CSR activity dubbed “tuungane Pamoja” and MOH vaccination campaigns. Despite the inflation, some FMCG players have diversified campaigns and grown spending from 2021; Coca-Cola has 46% growth in mainly due to Fanta, Sprite, Minute maid and world cup trophy campaign.



\*SOURCE: Ipsos Audience Measurement, Jan - May 2022 || Emmah.Ngugi@ipsos.com || www.ipsos.com/en-ke