



2025 HALF YEAR IN REVIEW

HIGHLIGHTS AND INSIGHTS

The 2025 Half-Year In-Review Report

The ISA Year in Review made a vibrant return, and this time, we dialed up the red carpet energy. Alongside the usual brilliance from marketing and research stars, a new headliner joined the mix: Media took center stage.

We unpacked it all. From the Top 10 Marketing Trends for 2025, the Consumer Report Card, and the evolution of Marketing Agency Models, to deep dives into the 2025 Kenya Media Landscape and Media & Innovation. Over 100 professionals showed up and left with powerful insights to guide the year ahead.

Dive in for insights from our expert guest speakers and much more!

A WORD FROM ISA AFRICA'S MANAGING DIRECTOR

Susan Makau

Managing Director, ISA Africa



Marketing 2025: Building Trust, Leveraging AI, and Connecting Authentically

The marketing landscape is undergoing a seismic shift, demanding a strategic recalibration for brands seeking relevance and resonance in 2025. The International School of Advertising (ISA) Africa's recent "Year in Review & Implications for 2025" event, featuring insights from industry leaders, shed light on key evolutions in consumer behavior, media consumption, and technology that will define success in the coming year.

The Erosion of Trust: A Call to Action:

Consumer trust is demonstrably eroding, driven by factors impacting perceived value. According to OnePulse's Consumer Report Card – 2024 H2, key drivers include rising prices, perceived quality decline, and substandard customer service. This erosion is particularly pronounced in sectors like personal care, household products, telcos, banks, and e-commerce. To counteract this trend, brands must prioritize radical transparency, unwavering quality assurance, and proactive customer service. Focus on reliability and responsive engagement is critical to rebuilding consumer confidence.

The AI Imperative: Augmentation, Not Replacement:

Artificial intelligence is revolutionizing marketing, offering unprecedented opportunities for personalization and efficiency. However, authenticity is paramount. While AI can personalize experiences and automate processes, it must augment, not supplant, human creativity and strategic thinking. Over-reliance on AI-generated content without a human touch risks damaging brand credibility. As Vimal Kaul from Ogilvy emphasized, agencies must integrate AI into every pillar of marketing – strategy, content, data, and technology – for optimal impact. Platforms like WPP Open, offering enterprise-level AI models and centralized AI-enabled workflows, facilitate scalable AI integration. Critically, ethical AI usage, including transparency, bias mitigation, and responsible AI governance, is crucial for maintaining consumer trust.





Francis Gachagua

CEO, One Pulse Kenya



Key Highlights from the Consumer Report Card – 2024 H2

1. Brand Connection Factors.

- Consumers feel connected to brands that provide quality, great customer service, affordability, strong marketing, and heritage.
- Neuromarketing reveals that emotional connections, nostalgia, and community-building are stronger drivers of brand affinity than just price or promotions.

2. Brand Trust Erosion.

- Consumers lost trust in brands due to price increases, perceived quality decline, and poor customer service.
- Key sectors affected include personal care, household products, telcos, banks, e-commerce platforms, and government institutions.

3. Most Memorable Brands and Campaigns.

- Brands leveraging bold storytelling, humor, nostalgia, and influencer marketing made a stronger impact.
- Cadbury's nostalgic campaigns and Dairyland's emotional storytelling were particularly successful.

4. Influencer and Consumer Advocacy

- Influencer marketing continues to be effective, but consumer advocacy and peer recommendations are proving even more influential.
- Successful brands are focusing on community-driven marketing strategies rather than one-time influencer endorsements.

5. AI & Advertising

- AI is increasingly used for ad creation and personalization, but consumers are becoming more critical of AI-generated content.
- Authenticity remains key—brands must balance automation with human creativity.



Implications for Brands in 2025

1. Prioritize Emotional & Community-Driven Engagement:

- Brands must create deeper emotional connections through storytelling, nostalgia, and community building.
- Consumer advocacy (word-of-mouth and brand ambassadors) will be more valuable than influencer marketing alone.

2. Address Consumer Trust Issues:

- Transparency in pricing, quality assurance, and service excellence will be critical to retaining consumer loyalty.
- Brands in telecom, banking, e-commerce, and government sectors must focus on service reliability and consumer engagement.

3. Optimize AI for Authenticity:

- AI should enhance, not replace, human creativity in advertising.
- Overuse of AI-generated content without a human touch risks reducing brand credibility.

4. Leverage Data to refine Brand Strategy:

- Brands should invest in real-time consumer insights to predict trends and tailor messaging.
- Personalized, hyperlocalized marketing will be essential to cut through market clutter.

Haron Muchai
Research and Strategy Manager,
ReelAnalytics



Key Highlights from the Kenya Media Landscape – 2024

1. Economic Factors Impacting Media & Advertising:

- Kenya's GDP growth projected at 5% in 2024 (down from 5.6% in 2023).
- Challenges: Inflation, debt burden, and global economic uncertainty.

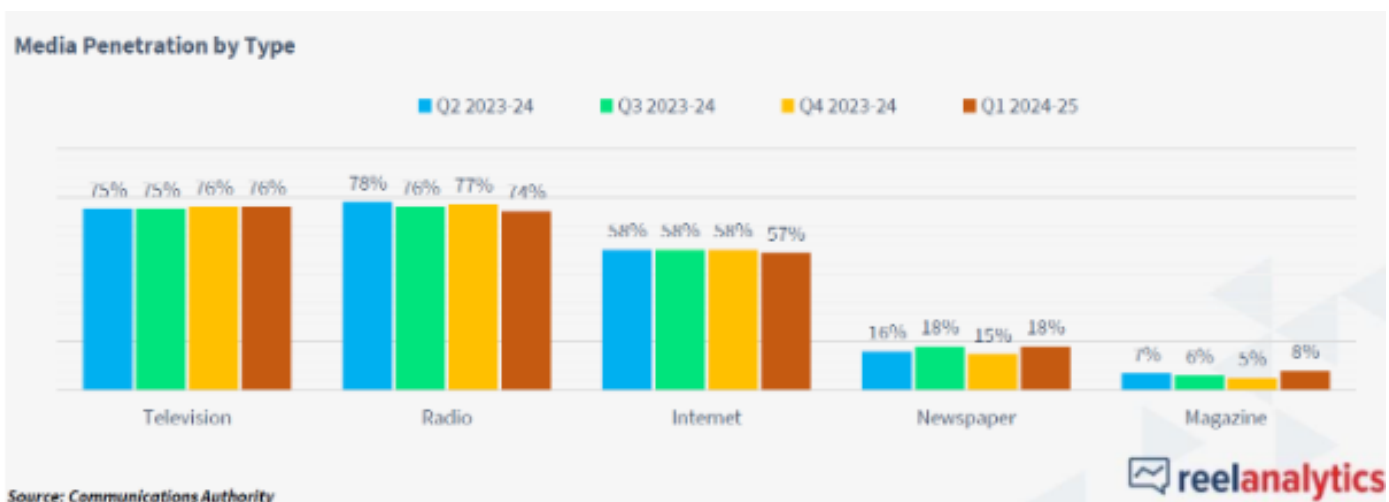
Impact: Brands are cutting ad spend and shifting toward digital transformation.

2. Media Consumption Trends;

- **TV & Radio still dominate**, but digital platforms (TikTok, YouTube, and WhatsApp) are growing fast.
- **Print media is declining**, while Out-Of-Home (OOH) advertising is evolving with tech-driven targeting.

3. Advertising Spend & Industry Insights;

- TV accounts for 59% of ad spend, led by betting, media, and banking sectors.
- Digital ad spend is increasing, but traditional media remains significant.
- Top advertisers include MultiChoice Kenya, Safaricom, Royal Media Services.



Implications for Brands in 2025

1. Reallocate Budgets Smartly

- TV and radio still matter, but brands must optimize spend across digital, influencer marketing, and programmatic ads.

2. Leverage Digital and Social Media

- YouTube, TikTok, and WhatsApp are critical for audience engagement.
- Data-driven media buying will ensure better ROI.

3. Innovate in OOH & Traditional Media

- Tech-driven outdoor ads (e.g., digital billboards) will outperform static ads.
- Smart segmentation in TV and radio will enhance targeting efficiency.

4. Stay Agile amid Economic Challenges

- Focus on high-ROI marketing strategies to navigate economic uncertainties.
- Localization of content and messaging will drive stronger engagement

Vimal Kaul
Chief Technology Officer,
Ogilvy Africa



Key Highlights from "Integrating AI into the Agency Model".

The Future is AI-Integrated

The marketing world is no stranger to change, but few shifts have been as transformative as the rise of artificial intelligence. Once seen as a tool for automating simple tasks, AI is now at the heart of strategic decision-making, creative execution, and performance optimization. Agencies that continue to treat AI as an isolated function—primarily for content generation—are at risk of being outpaced by those embracing AI as a fully integrated force across strategy, data, content, and technology.

AI Across the Marketing Pillars

To maximize AI's potential, agencies must integrate it into every pillar of marketing:

AI in Strategy

- AI transforms strategic planning by identifying patterns and trends that humans might overlook.
- Predictive analytics and machine learning enable more dynamic, adaptable marketing strategies.
- AI-driven insights empower brands to refine positioning and messaging based on real-time data.

AI in Content

- Beyond generating text, AI optimizes content for audience engagement, ensuring it aligns with strategic goals.
- AI-driven personalization tailors messaging to individual consumers, increasing impact.
- AI-assisted creative tools enhance human ingenuity rather than replace it.

AI in Data

- AI processes vast data sets at unparalleled speeds, providing actionable insights for campaign refinement.
- AI-powered dashboards enhance measurement, attribution, and audience segmentation.
- Real-time data analysis allows for on-the-fly optimizations, ensuring marketing efforts stay effective.

AI in Technology

- AI-driven automation streamlines workflows, reducing inefficiencies across agency operations.
- Smart CRM systems anticipate consumer needs and automate interactions for seamless customer experiences.
- AI enables precision in media buying, ad placements, and budget allocations, ensuring maximum ROI.

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The 2025 Imperative: Preparing for an AI-Native Future

As AI continues to reshape marketing, agencies must embrace five key shifts to stay ahead:

- AI as an integrated system, not a standalone tool. AI should be deeply embedded into every aspect of marketing operations.
- Dynamic, real-time strategy development. Traditional static strategies are giving way to continuously evolving AI-driven models.
- AI-augmented creativity. While AI can enhance ideation, storytelling remains human-led.
- AI adoption as a competitive advantage. Agencies leveraging AI effectively will outperform those lagging in adoption.
- Ethical AI usage. Transparency, bias mitigation, and responsible AI governance will be essential to maintaining consumer trust.

WPP Open: AI-Integrated Marketing at Scale

WPP Open serves as a centralized AI-powered platform that integrates process, tools, data, and talent into a seamless workspace. Key features include:

- Enterprise-Level AI Models: Access to AI-driven tools for content creation, data analytics, and campaign automation.
- Centralized AI-Enabled Workflows: Ensures AI is embedded into daily marketing processes, improving efficiency and decision-making.
- Adaptive AI Integration: The platform evolves with the changing AI landscape, providing flexible solutions for agencies.
- Talent and Data Synergy: AI-powered matchmaking aligns the right talent with data insights to optimize marketing outcomes.

The Bottom Line

AI is not merely an efficiency booster—it is a fundamental shift in how agencies operate, strategize, and create value. Agencies that treat AI as an afterthought will struggle, while those that fully integrate AI will set new industry standards. The future belongs to AI-native agencies that seamlessly blend human creativity with machine intelligence to deliver smarter, more impactful marketing solutions.

Alvin Wamocho
Research Executive Quant,
Insights Division,
KANTAR



Top 10 Marketing Trends to Watch in 2025

1. AI-Driven Personalization & Predictive Marketing

- AI will be embedded across marketing functions, delivering hyper-personalized experiences.
- Predictive analytics will allow brands to anticipate consumer behavior and adjust campaigns in real time.

2. The Rise of Value-Based & Purpose-Driven Branding

- Consumers will demand brands take a stand on social, environmental, and ethical issues.
- Sustainability and inclusivity will be key differentiators in 2025.

3. Shifting Consumer Engagement Models

- From transactions to relationships: Brands will need to focus on community-building and long-term engagement.
- Interactive experiences (AR, VR, and immersive storytelling) will gain traction.

4. Media Fragmentation & Multi-Channel Marketing

- Consumers are consuming content across multiple platforms—brands must integrate TV, digital, and OOH seamlessly.
- Cross-platform consistency will be crucial to maintaining brand recall.

5. E-Commerce & Social Commerce Acceleration

- Social shopping on TikTok, WhatsApp, and Instagram will be a major growth area.

6. Experiential & Immersive Marketing

- Augmented reality (AR), virtual reality (VR), and gamification will redefine customer experiences.
- Brands will create interactive digital experiences that deepen consumer engagement.

7. Data-Driven Decision-Making

- Real-time analytics will be key to optimizing campaigns and tracking consumer behavior.
- Brands will rely on AI-powered insights for better audience segmentation and targeting.

8. Influencer & Community-Led Marketing

- Peer recommendations and authentic influencer collaborations will hold more value than traditional ads.
- Brands will shift focus from celebrity endorsements to micro and nano influencers with high engagement rates.

9. Sustainability & Ethical Transparency

- Consumers will expect proof of brands' ESG (Environmental, Social, and Governance) commitments.
- Transparency in sustainability efforts will become a key purchase driver.

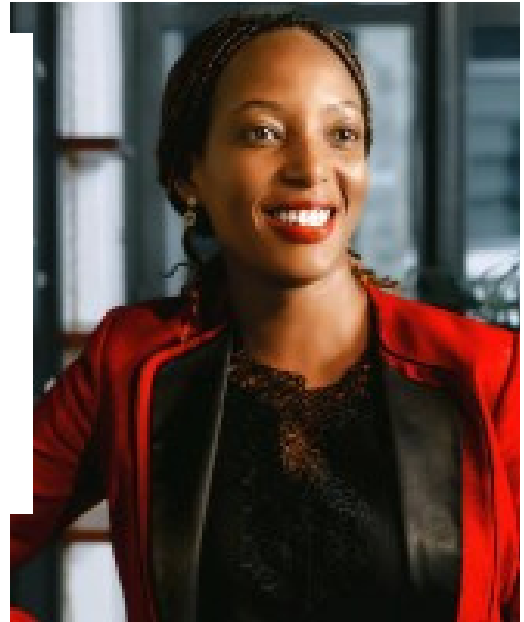
10. AI-Enhanced Creativity & Automation

- AI will support storytelling, content creation, and campaign management, but human oversight will remain critical.
- Automation will streamline workflows while maintaining brand authenticity.

Kantar's insights reinforce that 2025 will be a year of AI-powered, socially conscious, and immersive marketing. Brands that integrate data-driven personalization, digital commerce, and purpose-driven storytelling will emerge as leaders in the evolving marketplace.

Simaloi Dajom

Head of Nation Broadcast Division



Key Highlights from "Media Innovation"

1. State of Media Consumption in Kenya:

- 76% of Kenyans consume TV & radio, with a modest increase in both mediums in 2024.
- Digital platforms are growing, especially streaming services, social media, and on-demand content.
- Print media continues to decline, while digital-first content strategies are becoming dominant.

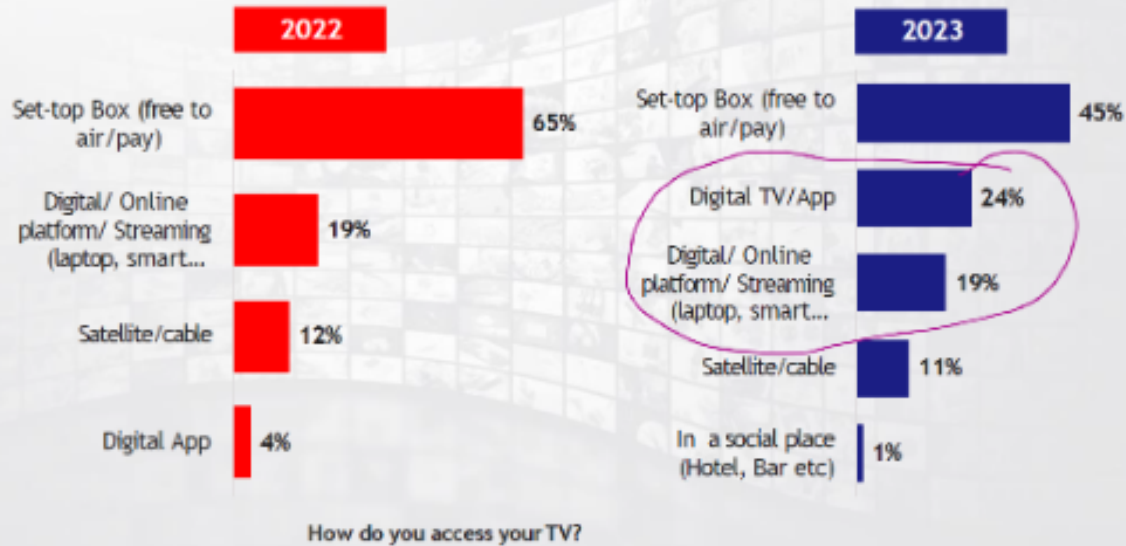
2. How TV & Digital Content is Evolving:

- More viewers accessing TV via digital platforms (24% on apps, 19% on streaming services), but traditional set top boxes still lead at 45%
- Hybrid content models (TV + digital + social) are driving audience engagement.
- Programs like “Fixing The Nation” use multi-platform distribution (TV, radio, digital) to enhance interaction.

3. Rise of Digital-First Content & Influencer-Led Storytelling:

- Digital-native content, such as short-form videos and interactive news formats, is becoming more popular.
- Flaqo’s comedy skits on NTV illustrate how influencers are shaping mainstream media.

HOW TV CONTENT IS ACCESSED



n=2729, Those who watch TV

STATE OF THE MEDIA REPORT 2023/2024

Implications for Brands in 2025

1. Brands Must Embrace Multi-Platform Content Strategies:

- Traditional TV must be complemented by digital streaming and social media engagement.
- Interactive, cross-platform storytelling will drive deeper audience connections.

2. Digital-First Content is the Future:

- Brands should invest in mobile-friendly, on-demand, and interactive content.
- Short-form videos, live streams, and influencer collaborations will dominate media consumption.

3. Influencers & User-Generated Content (UGC) Will Shape Brand Engagement:

- Collaborating with digital creators will help brands stay relevant.
- Authentic, culturally resonant storytelling will drive consumer engagement.

4. Adapting to Evolving Consumer Media Preferences:

- Print will continue declining, so brands must shift resources to digital news platforms.
- AI-powered content personalization will be key to delivering the right message to the right audience.

The Power of Influencer Storytelling :

BELVA DIGITAL PANEL DISCUSSION

Finally we had a panel discussion run by a team from Belva digital.

This panel discussion explored influencer marketing's impact and how brands can effectively leverage storytelling.



Melvin Mwakugu,
Head of Strategy,
Belva Digital



Angie Njagi,
Creative Director,
Belva Digital



Brian Mutinda,
Assistant Creative Director,
Belva Digital

Key Takeaways:

- **Authenticity Matters:** Consumers resonate with influencers who tell genuine, relatable stories.
- **Long-Term Collaborations:** Brands should build long-term relationships with influencers for sustained impact.
- **Measuring Impact:** Brands need to go beyond engagement metrics to measure conversions and brand perception.
- **Influencers as Brand Ambassadors:** Selecting

As marketing evolves in 2025, brands must embrace AI-powered personalization, emotional storytelling, and data-driven decision-making to stay competitive. Consumers are increasingly valuing trust, authenticity, and purpose-driven branding, with community advocacy proving more influential than traditional influencer marketing. AI is transforming strategy, content, data, and technology, ensuring real-time adaptability and efficiency, but brands must balance automation with human creativity to maintain credibility. The media landscape is shifting, with digital, social, and hybrid content models reshaping audience engagement. Economic pressures will push brands toward high-ROI, tech-driven advertising strategies, including smart segmentation in TV, digital billboards, and AI-enhanced programmatic ads. The future belongs to agile, AI-native brands that seamlessly integrate data, automation, and ethical transparency into their marketing ecosystems.

ABOUT THE INTERNATIONAL SCHOOL OF ADVERTISING

Established in 2014, the International School of Advertising (ISA Africa) is a leading training institution in East Africa offering Marketing and Advertising Programmes that help current marketing professionals sharpen their skills, and attract career and business opportunities.

Integrated Brand Communication (IBC)

The Integrated Brand Communications Program focuses on the critical aspects of Marketing, Branding, Advertising and Digital Marketing. ISA offers an experiential practice-based approach, making participants practically skilled to handle the requirements and challenges of their day-to-day tasks.

Apprenticeship Program

ISA also offers an Apprenticeship program which is uniquely tailored to meet the needs of recent graduates looking to kick-start a career in the Marketing and Advertising Industry. This six-month virtually interactive learning program is backed by 3 months of a paid apprenticeship.

Short Courses

ISA Africa offers short courses to sharpen and upgrade your skills in the Marketing industry. The five specialized Short Courses offered include:

- Marketing and Brand Planning
- Strategic Advertising Management
- Integrated Media Management
- Digital for Business
- Account Management & Life Skills

Chartered Institute of Marketing CIM (UK)

To become a globally recognized Chartered Marketer with the CIM Diploma; ISA offers three CIM Level 6 Diploma qualifications namely:

1. Diploma in Professional Marketing
2. Diploma in Professional Digital Marketing
3. Diploma in Sustainable Marketing

Our intakes are in October, January and July

In-house Tailor-made Training

ISA also offers master classes for high-level members of organizations seeking to meet specific training needs. These are typically run with international speakers and renowned industry experts. At ISA Africa, we are happy to come and discuss your needs and see where our programs can benefit you or your organization.

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SKILLS FOR BUILDING BRANDS

International School of Advertising
