Socio-Economic Dynamics and Pay-Tv Market Penetration: Examining the Influence of Household Economic Factors on Pay-TV Adoption in Machakos County, Kenya

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ABSTRACT

This study investigates the influence of socio-economic dynamics on pay-TV market penetration within Machakos County, Kenya. Grounded in the Technology Acceptance Model (TAM) developed by Fred Davis (1989) and the Unified Theory of Acceptance and Use of Technology (UTAUT) by Venkatesh, Morris, Davis, and Davis (2003), the research explores how critical socio-economic indicators specifically household income, education level, and employment status shape the adoption and retention of subscription broadcasting services. These dynamics are essentially relevant in a decelerating Kenyan media market, where household financial agency and digital literacy determine the shift from traditional viewing to premium digital platforms. A descriptive survey research design was adopted, drawing a representative sample of 385 households across the Mavoko, Mwala, Yatta, and Machakos Town sub-counties. Data was collected using structured Likert-scale questionnaires to capture household perceptions of affordability, perceived utility, and service value. The collected data was analyzed using descriptive statistics and multiple regression analysis via SPSS software to establish the relationship between variables and examine the strength of socio-economic predictors. The findings indicated that socio-economic dynamics were a statistically significant determinant of pay-TV penetration ($p < 0.05$), with household income and employment stability emerging as dominant factors influencing subscription duration and Average Revenue per User (ARPU). The research concludes that economic constraints and educational alignment remain primary filters for market growth in peri-urban settings. The study recommends that pay-TV providers develop tiered, socio-economically segmented pricing models to translate household economic realities into sustainable market penetration.

Keywords: Pay-TV penetration, Socio-economic dynamics, Technology Acceptance Model, Machakos County, Kenya.

INTRODUCTION

Modern-day media firms operate in increasingly dynamic, competitive, and fast-evolving environments, necessitating strategic flexibility, deep market understanding, and robust penetration orientations. In this context, socio-economic dynamics play a vital role in determining the efficiency of technology adoption and service uptake. Among the various influences on market behavior, socio-economic factors specifically household income, education level, and employment status stand out for their direct impact on consumer purchasing power and the perceived utility of premium services (PricewaterhouseCoopers, 2025). These dynamics prioritize affordability, attainment of information needs, and value-for-money, aligning household consumption with measurable financial capabilities. In the Kenyan pay-TV sector, where market growth has decelerated to a mere 2.4% and customer retention is a priority, understanding socio-economic dynamics becomes a vital determinant of strategic survival (Communications Authority of Kenya, 2024).

In spite of its significance, the connection between socio-economic agency and pay-TV market penetration remains understudied, especially in transitional peri-urban counties like Machakos, Kenya. Media industry players are often met with "penetration gaps" despite offering diverse content and advanced technology, raising questions about the role of household economic status in subscription success (Muchiri, 2025). Comprehending

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whether income stability and educational alignment enhance or hinder effective technology diffusion is crucial for both practitioners and scholars. Thus, this study evaluates how key aspects of socio-economic dynamics influence the penetration of pay-TV services in Machakos County. The findings of the study aim to provide deeper insights into how economic alignment enhances or inhibits the uptake of digital media in dynamic peri-urban environments.

Background of the Study

The effective penetration of pay-TV services remains a vital yet challenging element of media industry success in emerging markets. While many service providers commit considerable resources to infrastructure and content acquisition, very few attain their intended penetration targets due to gaps in adoption. The conversion of available technology into tangible outcomes calls for not only effective marketing practices but also corroborative household economic behaviors and values. It is within this backdrop that socio-economic dynamics become essential, as they impact how consumers translate information needs, make subscription decisions, and participate in the digital economy (PricewaterhouseCoopers, 2025). A well-aligned socio-economic environment provides the financial and educational foundation necessary for successful technology implementation across urban and rural demographics.

Socio-economic dynamics comprising household income, education level, and employment status stress affordability, cognitive alignment, and goal-oriented consumption. These factors emphasize customer satisfaction, financial results, and market positioning; all of which directly impact a firm's capacity to deliver on penetration initiatives (Kenya Institute for Public Policy Research and Analysis, 2024). In sectors marked by fast-changing market conditions, a results-focused economic profile can lead to higher subscription loyalty and operational discipline. Socio-economic agency inspires households to set consumption priorities and pursue information efficiency, which are vital for realizing penetration goals in competitive media environments (Communications Authority of Kenya, 2024).

In the Kenyan pay-TV industry, companies operate in an environment characterized by regulatory shifts, changing consumer expectations, and technological disruptions from internet-based platforms. These aspects demand market strategies that strike a balance between high-quality content and economic adaptability, coupled with innovation and price sensitivity. Comprehending how socio-economic dynamics impact pay-TV penetration is therefore necessary in closing the gap between service availability and actual adoption, enabling media companies to attain long-term performance and sustainable strategic impact in transitional counties like Machakos (Muchiri, 2025).

THERETICAL FRAMEWORK

This study is anchored on the Technology Acceptance Model (TAM) developed by Fred Davis (1989), a widely renowned model for explaining user acceptance of technology. The TAM opines that an individual's behavioral intention to adopt a service is defined by two facets: perceived usefulness and perceived ease of use (Davis, 1989). These interlocking facets determine the rate at which technology permeates a market. In the context of socio-economic dynamics, perceived usefulness is heavily influenced by household income and education, as these factors determine whether the consumer perceives the cost of pay-TV as a justifiable investment in performance or effectiveness (Davis, 1989; Bhuiyan, 2025).

Within this framework, the Diffusion of Innovation (DOI) Theory, popularized by Everett Rogers (2003), is utilized to examine how the service spreads through a social system. DOI stresses that adoption is a process driven by the perceived attributes of the innovation, such as relative advantage and compatibility. For residents of Machakos County, the "relative advantage" of pay-TV over free-to-air options is often filtered through socio-economic lenses, where higher education levels correlate with a greater demand for diverse content, and income levels determine the compatibility of the service with the household's financial reality (Rogers, 2003).

Furthermore, the study incorporates the Unified Theory of Acceptance and Use of Technology (UTAUT) established by Venkatesh, Morris, Davis, and Davis (2003). This model identifies performance expectancy, effort expectancy, social influence, and facilitating conditions as the core constructs directing usage intention.

Leadership in subscription broadcasting must focus on these "facilitating conditions," which include the socio-economic stability of the user. In the Kenyan pay-TV industry, where companies deal with enormous market competition and evolving consumer needs, the UTAUT model presents a comprehensive theoretical basis for evaluating how socio-economic status impacts penetration (Venkatesh, Morris, Davis, & Davis, 2003).

These models support flexibility in responding to external economic pressures while maintaining a lens on consumer behavior. Thus, this theoretical framework not only informs this study conceptually but also underpins the dynamic balance needed between affordability, competitiveness, and long-term strategic market penetration.

Problem Statement

Despite the extensive adoption of digital broadcasting technology across the Kenyan media industry, many firms continuously struggle to translate service availability into tangible market penetration outcomes. While many of the firms stress content diversity, technological innovation, and target achievement, these efforts often fail to achieve expected subscriber growth, which slowed to a mere 2.4% by March 2024 (Communications Authority of Kenya, 2024). One possible reason for this disconnect is the nature and strength of socio-economic dynamics; particularly household income, education level, and employment status, which stress affordability, perceived utility, and financial accountability (PricewaterhouseCoopers, 2025).

However, there is little empirical evidence showing how these localized socio-economic dynamics influence or inform the penetration of pay-TV services in transitional peri-urban settings like Machakos County (Muchiri, 2025).

Existing national-level data often masks the unique economic challenges faced by households in sub-counties like Mavoko, Mwala, and Yatta, hindering the ability of providers to tailor their strategies (Communications Authority of Kenya, 2024). This study thus seeks to close that gap by evaluating the impact of socio-economic dynamics on pay-TV market penetration in Machakos County, Kenya.

Research objective

To determine the influence of socio-economic dynamics on pay-TV market penetration in Machakos County, Kenya.

Significance of the study

The results of this study contribute considerably to the expanding body of research on media consumption and technology adoption by presenting empirical findings on the role of socio-economic dynamics in influencing pay-TV market penetration. By evaluating how household income, education levels, and employment status impact adoption outcomes, the research deepens the theoretical comprehension of the relationship between economic agency and technology diffusion.

Practically, the findings provide pay-TV operators with actionable localized intelligence on how to reconcile pricing models, content offerings, and marketing strategies with the unique profiles of peri-urban residents. Such a targeted approach is essential for fostering sustainable growth amidst increasing competition from digital streaming alternatives.

Furthermore, the research offers content providers and policymakers, such as the Communications Authority of Kenya (2024), evidence-based insights to guide future programming and digital inclusion policies. By highlighting the specific drivers and barriers within Machakos County, the study informs the development of initiatives aimed at bridging connectivity gaps and ensuring fair access to information. Eventually, the research features how understanding the unique peri-urban context can strengthen the accuracy of technology adoption models like TAM, DOI, and UTAUT in non-Western economies, serving as a crucial point of comparison for future research in other transitional regions across Kenya and the wider African continent.

LITERATURE REVIEW

Socio-Economic Dynamics in Technology Adoption Models

Socio-economic dynamics are hugely results-oriented, stressing household affordability, educational alignment, and employment stability. These dynamics are based on the belief that the peri-urban business environment is highly aggressive and price-sensitive, requiring service providers to offer superior value and flexible pricing to remain relevant. In socio-economically conscious households, the focus remains on performance metrics, accountability, and goal clarity, where residents evaluate pay-TV based on clear information gains and household utility (PricewaterhouseCoopers, 2025). Such practices foster confidence and efficacy in technology adoption within the community (Kenya Institute for Public Policy Research and Analysis, 2024).

However, an obsession with premium service offerings may risk forfeiting market reach among lower-income demographics, pointing to the need to strike a balance between high-quality content and the firm's pricing flexibility.

Socio-Economic Dynamics and Market Penetration

Socio-economic factors play a critical role in ensuring effective pay-TV market penetration by fostering a strong focus on affordability, perceived utility, and external competitiveness. According to Venkatesh, Morris, Davis, and Davis (2003), such dynamics inspire accountability, goal clarity, and a clear relationship between household needs and technological gains. Households that value customer satisfaction and external alignment often exemplify higher subscription duration and superior market responsiveness. Residents in these set-ups are inspired to maintain active subscriptions as performance-based assessments of "Price Value" help transform strategic media goals into tangible household outcomes (Venkatesh, 2024). This emphasis on measurable outcomes also strengthens the coordination between service providers and consumer needs, making sure that all efforts are aimed at realizing a firm's penetration goals.

However, while socio-economic dynamics foster penetration orientation, they can also generate potential challenges if not balanced with collaboration and flexibility in service delivery. Overemphasis on high-tier performance may discourage adoption among informal sector workers, resulting in short-term focus or high Subscriber Churn Rates. Obsession with premium targets may also hamper digital inclusion for households with lower educational attainment, both of which are critical for sustained market performance. Thus, successful market penetration in socio-economically diverse regions needs a delicate balance between external market success and internal household cohesiveness. As noted by Rogers (2024), firms that adopt a combination of strong performance orientation with adaptive and supportive pricing characteristics are more poised to achieve sustained strategic performance in competitive peri-urban set-ups.

Empirical Studies

Several studies have evaluated the relationship between socio-economic dynamics and technology penetration across sectors and contexts. Kamau and Ndung'u (2022) found that disposable income fosters market penetration by ensuring alignment between household financial capacity and subscription demands. Likewise, Chirchir (2024) concluded that household asset ownership had a positive influence on the propensity to subscribe to pay-TV among households in the Rift Valley, particularly when moderated by economic stability. Owuor and Kebaso (2023) found that balanced expenditure prioritization is necessary for effective media adoption in low-income settlements, while Muthoni (2021) established that education levels were vital for the awareness of digital advantages and the perceived value of information content. Generally, these findings reiterate the importance of income-based and education-driven factors in realizing strategic market penetration and adoption efficiency.

In Kenya, several studies uphold the positive role of socio-economic dynamics in media consumption. Kamau and Ndung'u (2022) concluded that disposable income had a considerable influence on subscription rates, with low-income households finding periodic fees untenable. Muthoni (2021) found out that higher education levels influence and impact the continuous utilization of pay-TV services through greater anticipated value. Likewise, Akinyi (2020) found out that formal employment status leads to better subscription outcomes among urban

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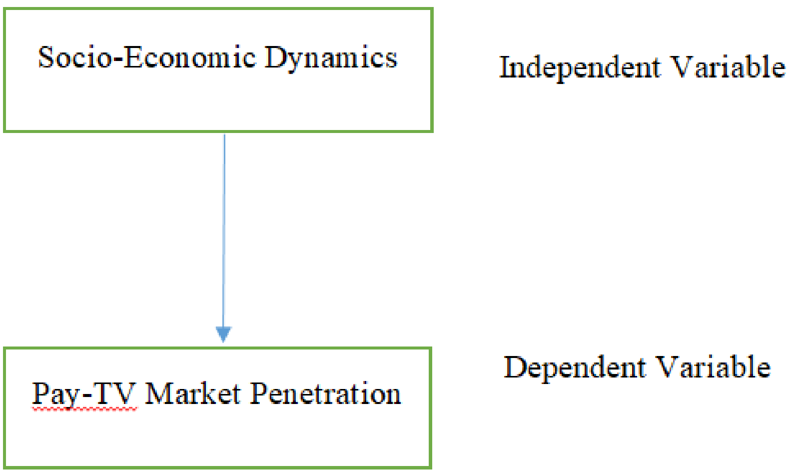
youth, while Owuor and Kebaso (2023) underscored that household prioritization of essential needs accounts for significant variations in pay-TV adoption among low-income earners. Conclusively, these studies reiterate the critical role played by socio-economic dynamics in strengthening market penetration results across transitional media environments.

CONCEPTUAL FRAMEWORK

The conceptual framework is founded on the premise that socio-economic dynamics—specifically household income, education level, and employment status—directly impact pay-TV market penetration results. A strong socio-economic foundation aligns household behaviors and financial choices toward attaining measurable adoption outcomes, inculcating financial agency and perceived utility. When household income is stable and the value of diverse content is recognized through education, resources are effectively mobilized, and the subscription process becomes more refined. The dependent variable, pay-TV market penetration, is thus manifested through subscription status, subscription duration, average revenue per user (ARPU), and subscriber churn rates. This framework shows that the strength of socio-economic dynamics influences the effectiveness of translating service availability into actionable and measurable outcomes within the Machakos County market.



METHODOLOGY

Research Design

This study utilized a descriptive survey design to evaluate the relationship between socio-economic dynamics and pay-TV market penetration within Machakos County, Kenya. The design was suitable as it facilitated the methodical collection and analysis of quantitative data without modifying variables, allowing for an unbiased assessment of the prevalent household dynamics. Through this design, the study gained an insightful understanding of how socio-economic elements such as household income, education level, and employment status suffice in practice and impact the penetration of subscription broadcasting services. The design was particularly appropriate due to its capacity to comprehensively depict the relationships, characteristics, and patterns within the dataset (Creswell and Creswell, 2023). Furthermore, the design allowed for the use of structured questionnaires and statistical methods to alienate trends, variations, and associations across different sub-counties, thereby strengthening the validity and reliability of the research.

Population and Sampling

The target population for the study was the 249,946 households residing in the four selected sub-counties of Machakos County: Mavoko, Machakos Town, Mwala, and Yatta. The choice of Machakos County was justified by its unique characteristics as a peri-urban, transitional economy exhibiting a blend of urban and rural demographics (UN-Habitat, 2023). The study applied a multi-stage sampling technique, where Cochran's (1977) sample size determination formula was deployed to arrive at a representative sample size of 385 households.

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Subsequently, a combination of cluster and systematic sampling techniques was used to ensure fair representation across different geographical and socio-economic strata, thus minimizing selection bias. From the 22 wards within the selected sub-counties, households were systematically selected to provide informed apprehension into the influence of socio-economic dynamics on pay-TV market penetration. The respondents included heads of households or eligible adult members, offering localized intelligence on how income, education, and employment status impact the decision to subscribe to digital media services. This rigorous sampling approach ensured that the final sample was highly representative of the diverse population residing in both high-density industrial zones like Mavoko and predominantly rural areas like Yatta.

Data Collection

Data was collected through the use of a structured questionnaire designed to evaluate respondents' perceptions of socio-economic dynamics and pay-TV market penetration in Machakos County, Kenya. The data collection instrument included Likert-scale items and open-ended questions, grounded in the Technology Acceptance Model (TAM) and the Unified Theory of Acceptance and Use of Technology (UTAUT) frameworks, alongside relevant media penetration literature. The assessment tool captured key socio-economic aspects such as household income, education level, and employment status, alongside penetration indicators including subscription duration and Average Revenue per User (ARPU). To ensure comprehensiveness and reliability, the researcher obtained necessary approvals from Machakos University and the National Commission for Science, Technology and Innovation (NACOSTI), ensuring all participation was voluntary and confidential.

To further strengthen the validity and reliability of the research instrument, a pre-test was conducted with 39 households (10% of the sample size) in a geographically distinct ward. Instrument validity was confirmed through construct, face, and content assessments as recommended by Creswell and Creswell (2023). Reliability was established using Cronbach's Alpha to confirm internal consistency across the constructs. The reliability test yielded a Cronbach's alpha of 0.78, indicating strong internal consistency. To maximize the response rate and ensure data consistency across the four sub-counties, the questionnaires were administered through face-to-face interviews and physical distribution, allowing for clarifications in areas with varying literacy levels.

Data Analysis

Analysis of data began with the application of descriptive statistical analysis to summarize and present the dimensions of socio-economic dynamics and the levels of pay-TV market penetration across the selected sub-counties. Mathematical tools such as frequencies, means, and standard deviations were used to analyze household perceptions regarding major aspects like income stability, education level, and employment status. These descriptives presented a highlight of how socio-economic realities are integrated within the transitional peri-urban media market. To ensure reliability and validity, Pearson correlation and ANOVA were used to confirm associations, while a multiple linear regression model was employed to evaluate the linkage between socio-economic dynamics and pay-TV penetration ($p < 0.05$). This analysis presented empirical evidence connecting household financial and educational agency to effective technology adoption and market growth.

RESULTS AND DISCUSSION

The results of the study revealed that among the factors influencing market growth, socio-economic dynamics had a positive and statistically significant effect on pay-TV market penetration (beta = 0.45, $p < 0.05$). This indicates that most households in Machakos County that maintain active subscriptions lay emphasis on income stability, employment status, and educational alignment. These findings indicate that households with stable and predictable income streams operate with a results-oriented financial focus, earnestly attempting to balance discretionary media spending with essential needs. The significance of socio-economic dynamics reflects the industry's dynamic and price-sensitive environment, where attaining tangible value and maintaining long-term subscription retention are key priorities. Such economic stability fosters financial discipline and continuous consumption optimization among household members.

Furthermore, the regression analysis results confirmed that socio-economic capacity is a statistically significant predictor of pay-TV market penetration. The dynamics contributed positively to goal alignment, perceived utility, and household performance monitoring systems. Households with stronger economic profiles enjoyed better alignment between the cost of digital services and the perceived value of diverse content offerings. These findings align with Kamau and Ndung'u (2022) and Muthoni (2021), who established that income and education influence and impact the continuity of subscriptions. Likewise, Suleiman and Jones (2025) and Shim, Choi, and Lee (2025) underscored that financial resources account for variations in media uptake across emerging markets. Conclusively, these findings allude that while technological attributes inculcate awareness, they may not directly deliver consistent penetration outcomes without the facilitating condition of socio-economic stability.

The results of the analysis show that while socio-economic dynamics do not single-handedly predict market growth, they forge a strong basis for household adoption and subscription discipline. The emphasis on monthly subscription costs ($M = 3.67$, $SD = 1.321$) reinforces the household push towards attaining perceived value and financial sustainability. However, the findings reveal that in the absence of complimentary aspects such as equipment subsidies and flexible payment plans, high initial setup costs ($M = 3.24$, $SD = 1.387$) may create market entry barriers. Therefore, successful pay-TV penetration in Machakos County depends not only on income levels ($M = 3.11$, $SD = 1.401$) but also on a market orientation that fosters affordability, payment flexibility, and responsiveness to household financial dynamics.

These findings were in tandem with previous studies by Kamau and Ndung'u (2022) and Owuor and Kebaso (2023), which reiterate that socio-economic stability strengthens penetration through affordability and clear utility objectives. Nevertheless, the existing studies also caution that excessive obsession with premium content and high price points can stifle digital inclusion and impede rural market reach. Likewise, the current study indicates that while households with strong socio-economic backgrounds are synonymous with higher penetration awareness, they are likely to neglect premium services if costs conflict with essential household needs. Thus, striking a balance between revenue goals and consumer price-sensitivity remains necessary for sustainable penetration effectiveness.

For the industry practitioners, the findings emphasize the significance of aligning subscription pricing metrics with household financial realities. Leadership should not only fixate on content excellence but also inculcate pricing agility and tiered packages to remain reactive to the peri-urban market dynamics. Integrating customer economic intelligence and feedback loops into penetration strategies can strengthen market responsiveness, household loyalty, and service innovation. Moreover, incorporating elements of supportive financing solutions can help moderate the economic barriers created by setup costs, nurturing a more sustainable and holistic approach to pay-TV market penetration.

CONCLUSION AND RECOMMENDATIONS

Conclusion

The study deduces that socio-economic dynamics play a critical yet fundamental role in pay-TV market penetration within Machakos County, Kenya. By stressing household income levels, employment status, and education, socio-economic dynamics cultivate the financial agency and perceived utility necessary for realizing subscription objectives. However, the results also indicate that economic capacity alone is inadequate to secure successful long-term penetration. When overly relied upon without considering service quality, it can result in subscriber churn and a forfeiture of market share to streaming alternatives. Thus, firms should incorporate socio-economic targeting with collaborative service elements such as content diversity, infrastructure support, and local relevance to strengthen market responsiveness. A well-balanced strategic positioning definitely fosters adoption efficiency, market coherence, and long-term organizational performance.

Recommendations

Based on the findings of the study, pay-TV firms should develop and progressively monitor pricing indicators that are directly aligned with household financial realities. Such alignment ensures that subscription packages work seamlessly and cohesively with the fluctuating income patterns of peri-urban residents. Leadership should also cultivate customer-centered execution approaches that link performance to service reliability and local content availability. However, organizations should take caution not to overemphasize premium competitiveness at the expense of affordability and digital inclusion. Striking a balance between revenue orientation and flexible pricing ensures that firms are able to adapt to changing economic environments while retaining subscriber loyalty and competitiveness. Eventually, inculcating a strategy that aligns market competitiveness with consumer affordability enhances both the penetration of media services and sustainable organizational growth.

Future studies should examine how socio-economic dynamics relate with digital transformation, over-the-top (OTT) streaming trends, and evolving digital literacy to impact the penetration of traditional broadcasting. Examining these interrelations would offer a more holistic apprehension of how different environmental and behavioral factors influence the success of media adoption. In addition, comparative research across multiple peri-urban counties would help understand whether the effects of socio-economic dynamics vary between different regional and regulatory contexts. Longitudinal studies may also present an understanding of how changes in household economic stability over time influence sustained subscription behavior and innovation, presenting deeper awareness for policymakers and practitioners in the media and wider ICT sectors.

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