



**SECOND QUARTER BROADCASTING SERVICES REPORT
FINANCIAL YEAR 2023/24**

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EXECUTIVE SUMMARY

During the period under review, a total of 21 licenses were issued to broadcasting service providers for radio and television broadcasting services, bringing the total number of licensed broadcasting service providers to 676 as of 31st December 2023. The total number of broadcasters who were operational are 246 TV and 303 FM radio stations as the end of the second quarter.

The subscriptions to broadcasting services grew marginally by 35,312 (0.56%) to a total of 6,378,439 at the end of December 2023 from 6,343,127 reported in the previous quarter. The subscriptions to DTT and DTH grew by 11,059 and 10,778 respectively, and for cable broadcasting services grew to 13,483. There was no growth in DTT population coverage which remained at 92.13%.

The broadcast content standards are set out in the Programming Code, and have been broadly characterized as watershed period, children protection, advertisements, local content, and accessibility for persons with disabilities. The compliance levels for TV broadcasting increased from 92.6 to 96.4%, while for radio broadcasting, the compliance level registered a decline from 98.2% to 90.03% compared with the last quarter.

I. INTRODUCTION

The Communications Authority of Kenya is the regulatory agency for the ICT industry in Kenya with responsibilities in telecommunications, e-commerce, cyber security, broadcasting and postal/courier services. The CA is also responsible for managing the country's numbering and frequency spectrum resources, administering the Universal Service Fund (USF), and safeguarding the interest of users of ICT services.

The Authority is mandated to promote and facilitate the development of a diverse range of broadcasting services in Kenya. This mandate includes issuing licenses for various broadcasting services and regulating and monitoring compliance with broadcast content standards. This report gives an overview of the performance of the broadcasting services during the first quarter of FY 2023/24.

II. STRATEGIC IMPLICATIONS

In its Strategic Plan 2023-28, the Authority, under Strategic Goal on Empowerment and Protection of Consumers of ICT Services and Key Result Area on Consumer Protection, is committed to ensuring compliance with regulatory requirements.

III. THE BROADCASTING MARKET

a) Licences issued during the period under review

The Authority issued 21 licenses compared to 15 licences that were issued in the last quarter. Figure 1 provides the trend in the number of licences issued in various categories.

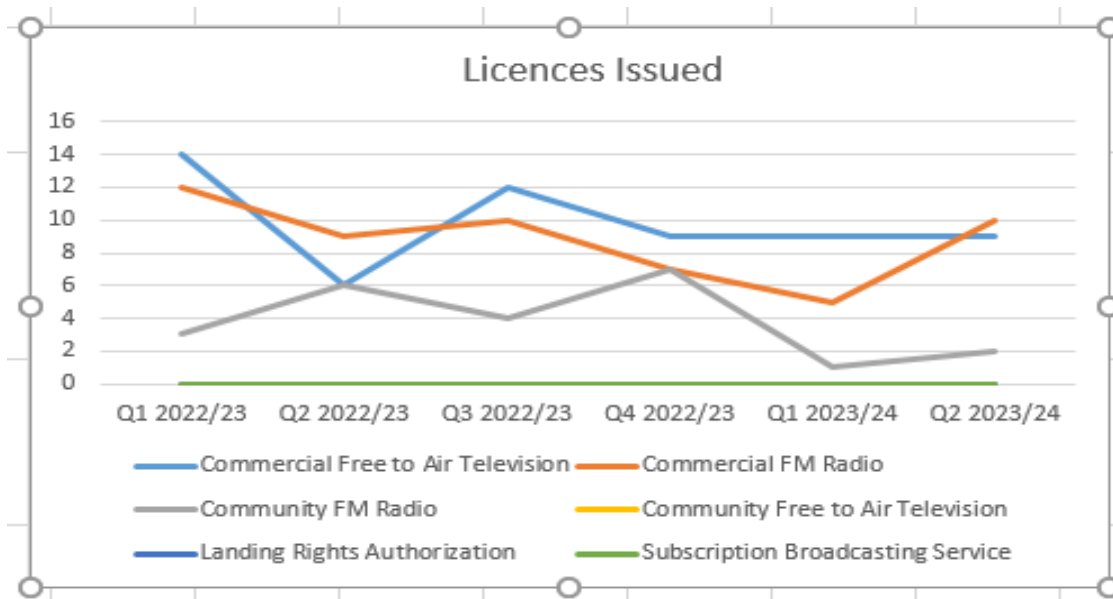


Figure 1: Trend on the number of licenses issued

The licences issued were only for commercial FM radio, community FM radio and commercial FTA TV broadcasting services. The cumulative number of licenses issued under the broadcasting sub-sector up as at end of the second quarter of the financial year 2023/24 was 676.

b) Subscription to the Broadcasting Services

During the second quarter, subscriptions to broadcasting services grew by 35,312 (0.56%) to a total of 6,378,439 at the end of December 2023 from 6,343,127 reported in the previous quarter. Figure 2 illustrates the trend in subscriptions for broadcasting services from Q4 of FY 2021/22 to the end of Q2 of FY 2023/24

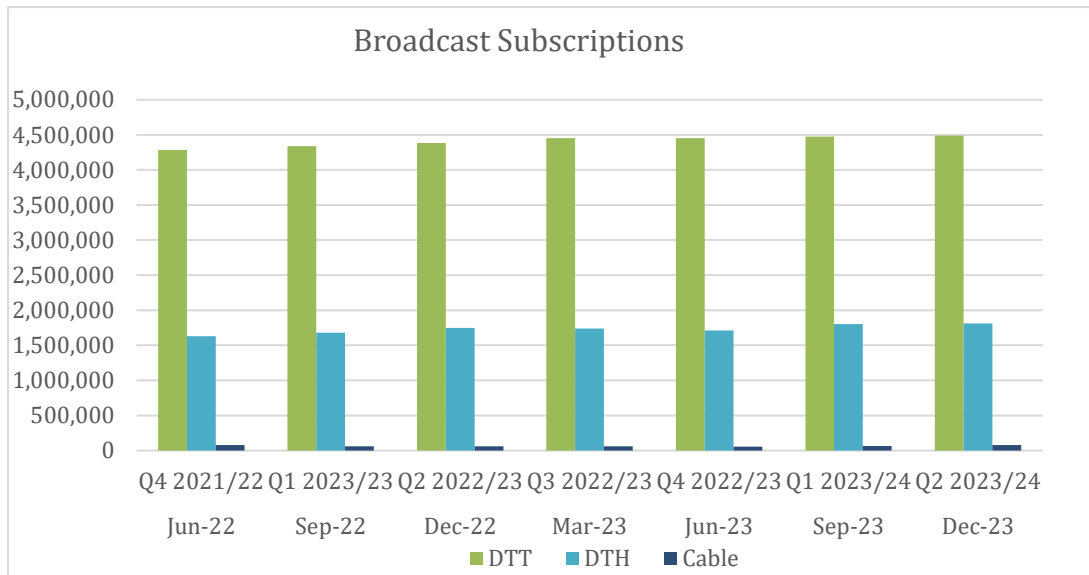


Figure 2: Trend in subscriptions for broadcasting services

DTT still remained the most popular platform to access subscription broadcasting services accounting for 70.4 % while DTH accounted for 28.4% of the total number of subscriptions to broadcasting services as of 31st December 2023. This could be due to the relative affordability of monthly subscription fees compared to cable and DTH thus resulting in mass access at the lower market segments. Access to television through cable medium remained the least popular with only 1.2% of subscriptions being for cable television services which could be attributed to the low cable footprint due to the high cost of setting up the infrastructure compared to other forms of media.

During the quarter, subscriptions to DTT grew by 11,059 (0.25%) compared to the growth of 26,138 in the previous quarter, resulting in a total of 4,487,877 while the subscriptions to DTH services also grew by 10,778 (0.6%), resulting in a total of 1,812,448 subscriptions. The subscription to cable broadcasting services grew by 13,483 (20.9%) resulting in a total of 78,114. Overall, the total subscriptions to broadcasting services grew by 35,312 (0.56%).

c) Digital Terrestrial TV (DTT) Population coverage

During the quarter, there was no change in DTT population coverage, and it remained at 92.13%.

IV. BROADCAST CONTENT STANDARDS PERFORMANCE

During the period September to December 2023, the Authority monitored a total of twenty-two (22) TV broadcasting stations and eleven (11) FM Radio broadcasting stations for compliance with the set programming standards. The broadcast content standards used are set out in the Programming Code, and have been broadly characterized as watershed period, local content,

children protection, advertisements, religious guidelines, and accessibility for persons with disabilities.

The compliance levels with minimum local content quota decreased marginally from 91.7% to 90.9%, while compliance with the programming guidelines for the watershed period, children protection stood at 100%, compared with Quarter 2 of FY 2022/23. The compliance with religious programming guidelines was at 100%, while that of accessibility to broadcasting services by PWDs was at 87.5%. The overall compliance level with TV broadcasting code increased from 92.6% to 96.4%.

With respect to radio broadcast stations, the compliance levels with programming guidelines for the watershed period decreased from 95.8% to 81.8%, while Children's programming and Good taste and decency stood at 100%. The overall compliance level with Radio broadcasting code decreased from 98.3% to 90.02%