



FOURTH QUARTER BROADCASTING SERVICES REPORT FINANCIAL YEAR 2023/24

**Direct any queries on the report to:
Director/Monitoring, Inspection and Regional Coordination
Tel: +254-703 042458 +254 -02042458
Email: info@ca.go.ke
Website: www.ca.go.ke**

TABLE OF CONTENTS

EXECUTIVE SUMMARY	3
I. INTRODUCTION	4
II. STRATEGIC IMPLICATIONS	4
III. THE BROADCASTING MARKET	4
a) Licences issued during the Quarter	4
b) Subscription to the Broadcasting Services	5
c) Digital Terrestrial TV (DTT) Population coverage	6
IV. BROADCAST CONTENT STANDARDS PERFORMANCE	6

EXECUTIVE SUMMARY

During the period under review, a total of 18 licenses were issued to broadcasting service providers for radio and television broadcasting services, while 56 licences were revoked, bringing the total number of licensed broadcasting service providers to 647 as of 30th June 2024. The total number of broadcasters who were operational stands at 223 TV and 252 FM radio stations as the end of the fourth quarter.

The total subscriptions to broadcasting services registered a grew by 0.23% to a total of 6,388,192 at the end of June 2024 from 6,373,288 reported in the previous quarter. The subscriptions to DTT grew by 0.5%, DTH by 0.6%, while for cable broadcasting services decreased by 23.4%. The DTT population coverage stood at 91.91%.

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 and radio broadcasting were 93.08% and 92.1% respectively.

I. INTRODUCTION

The ICT sector law mandates the Communications Authority of Kenya (CA) 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 fourth 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, committed to ensuring compliance with regulatory requirements.

III. THE BROADCASTING MARKET

a) Licences issued during the Quarter

The Authority issued 18 licenses compared to nine (9) licences that were issued in the last quarter. Figure 1 provides the trend in the number of licences issued in various categories.

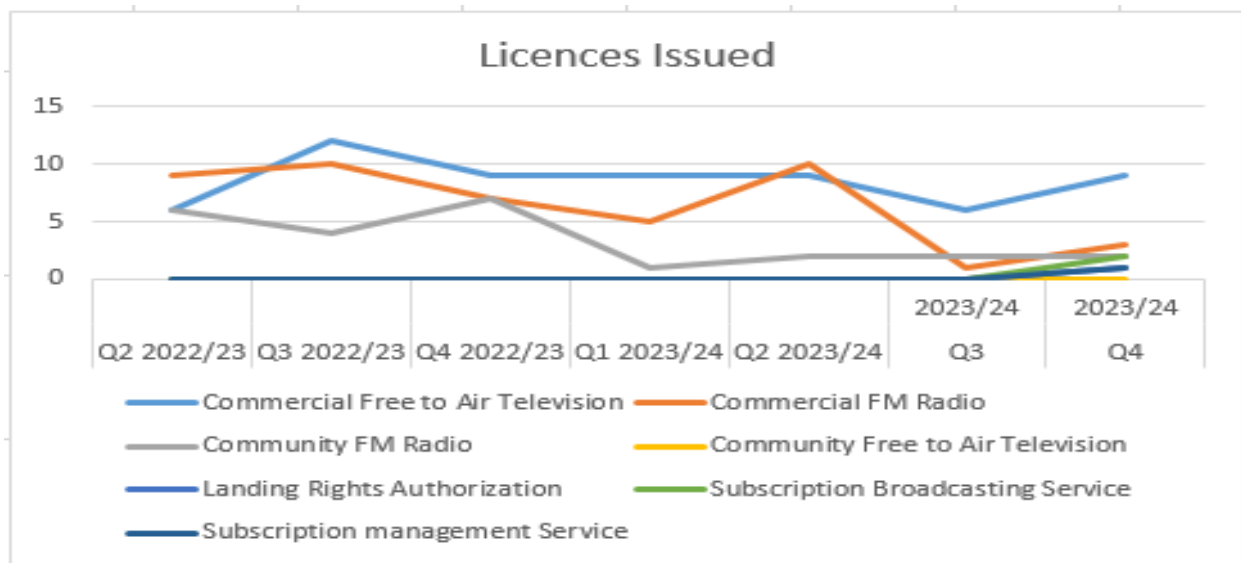


Figure 1: Trends on the number of licenses issued

The licences issued were three (3) for commercial FM radio, two (2) for community FM radio. Nine (9) for commercial Free to Air (FTA) TV, two (2) subscription broadcasting service and one (1) subscription management service.

During the quarter, the Authority revoked 56 licences, hence the cumulative number of licenses issued under the broadcasting sub-sector up as at end of the fourth quarter of the financial year 2023/24 was 647.

b) Subscription to the Broadcasting Services

During the fourth quarter, subscriptions to broadcasting services registered a marginal increase by 14,904 (0.23%) to a total of **6,388,192** at the end of June 2024 from **6,373,288** reported in the third quarter. Figure 2 illustrates the trend in subscriptions for broadcasting services from Q4 of FY 2021/22 to the end of Q4 of FY 2023/24

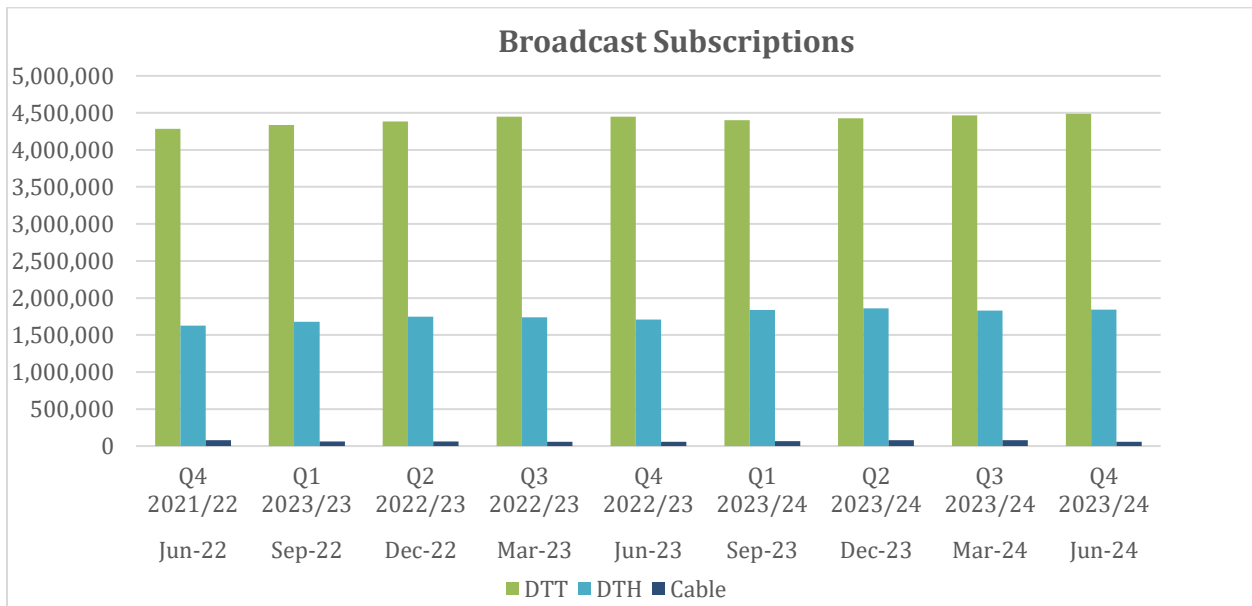


Figure 2: Trend in subscriptions for broadcasting services

Digital Terrestrial Television (DTT) remained the most popular platform to access subscription broadcasting services with 4,486,919 subscriptions followed by Direct to Home (DTH) with 1,841,697 subscriptions accounting for 70.23% and 28.83% of the total number of subscriptions to broadcasting services respectively as at of 30th June 2024.

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 0.93% 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 21,665 (0.5%) compared to an increase of 36,142 (0.8%) in the previous quarter, resulting in a total of 4,486,919 while the subscriptions to DTH services increased by 11,446 (0.6%), resulting in a total of 1,841,697 subscriptions.

The subscription to cable broadcasting services dropped by 18,207 (23.4%) resulting in a total of 59,576. Overall, the total subscriptions to broadcasting services grew by 14,904 (0.2%) subscriptions

c) Digital Terrestrial TV (DTT) Population coverage

During the quarter, there was a marginal change in DTT population coverage to stand at 91.91%.

IV. BROADCAST CONTENT STANDARDS PERFORMANCE

During the period April to June 2024, the Authority monitored a total of 30 TV broadcasting stations and twenty-four (24) 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, accessibility for persons with disabilities and broadcast competitions.

The compliance levels with minimum local content quota increased from 87.5% to 90%, while compliance with the programming guidelines for the watershed period, children protection religious programming guidelines stood at 80%, while that of accessibility to broadcasting services by PWDs was at 92.3%. The overall compliance level with TV broadcasting code decreased from 95.13% to 93.08%.

With respect to radio broadcast stations, the compliance levels with programming guidelines for the watershed period decreased from 83.3% to 79.17.%, while Children’s programming and Good taste and decency stood at 95.2%. The overall compliance level with Radio broadcasting code decreased from 92.8% to 92.1%