



1ST QUARTER BROADCASTING SERVICES REPORT FINANCIAL YEAR 2024/25

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EXECUTIVE SUMMARY

During the period under review, a total of 37 licenses were issued to broadcasting service providers for radio and television broadcasting services bringing the total number of licensed broadcasting service providers to 684 as of 30th September 2024. The total number of broadcasters who were operational is 246 TV and 252 FM radio stations as the end of the first quarter of FY 2024/2025.

As of 30th September, 2024, the total subscriptions to broadcasting services decreased to 6,133,955 from 6,388,192 reported in the previous quarter, representing a four (4) per cent decline. The subscriptions to Digital Terrestrial Television (DTT) grew by 0.53 per cent to 4,510,423, Direct-To-Home (DTH) decreased by 15.2 per cent to 1,562,638, while subscriptions for cable broadcasting services grew by 2.2 per cent to 60,894. The DTT population coverage stood at 91.91 per cent.

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 94.69 per cent and 97 per cent respectively.

I. INTRODUCTION

The Kenya Information and Communications Act, 1998, 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 first quarter of FY 2024/25.

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 by licencees with regulatory requirements.

III. THE BROADCASTING MARKET

a) Licences Issued During the July-September 2024 Quarter

The Authority issued 37 licenses compared to 18 licences that were issued in the previous quarter. Figure 1 provides the trend in the number of licences issued in various categories.

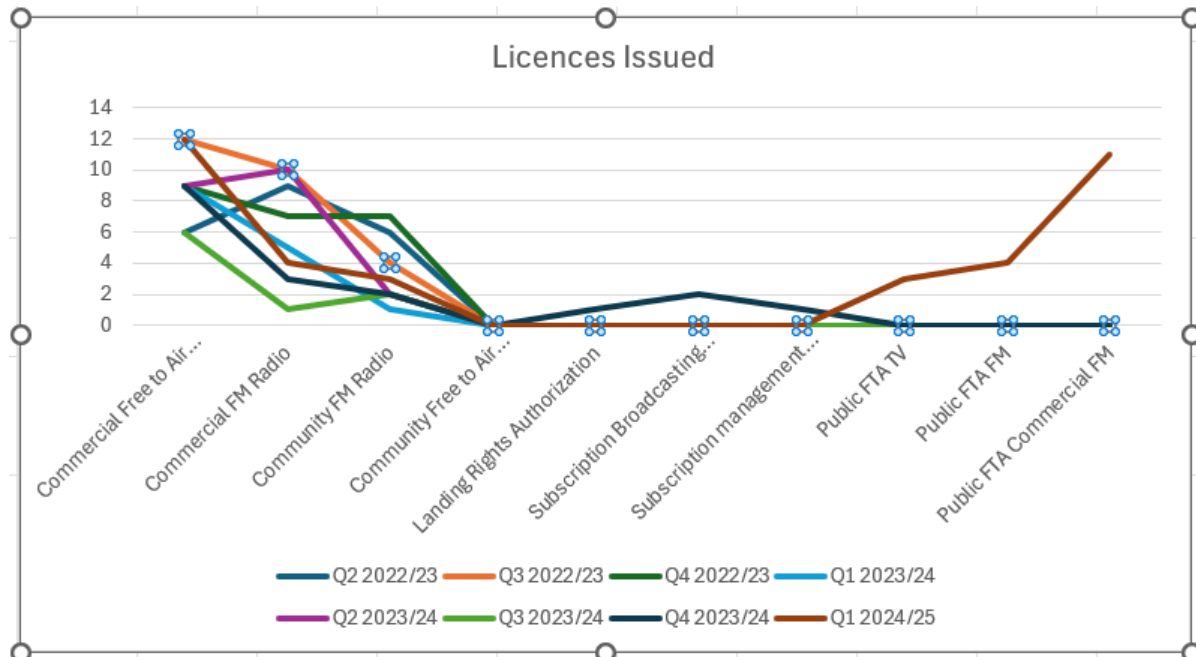


Figure 1: Trends on the number of licenses issued

The licences issued were four (4) for commercial FM radio, three (3) for community FM radio, twelve (12) for Free to Air (FTA) TV broadcasting service. Three (3) Public Free to Air TV

broadcasting licences, four (4) Public Free to Air FM broadcasting licences and 11 Public FTA Commercial FM broadcasting licences were also issued. The cumulative number of licenses issued under the broadcasting sub-sector as of the end of the first quarter of the financial year 2024/25 is 684.

b) Subscription to Broadcasting Services

During the first quarter, the total subscriptions to broadcasting services decreased by 254,237 to a total of **6,133,955** at the end of September 2024, down from **6,388,192**, representing a four (4) per cent decline. Figure 2 illustrates the trend in subscriptions for broadcasting services from Q4 of FY 2021/22 to the end of Q1 of FY 2024/25.

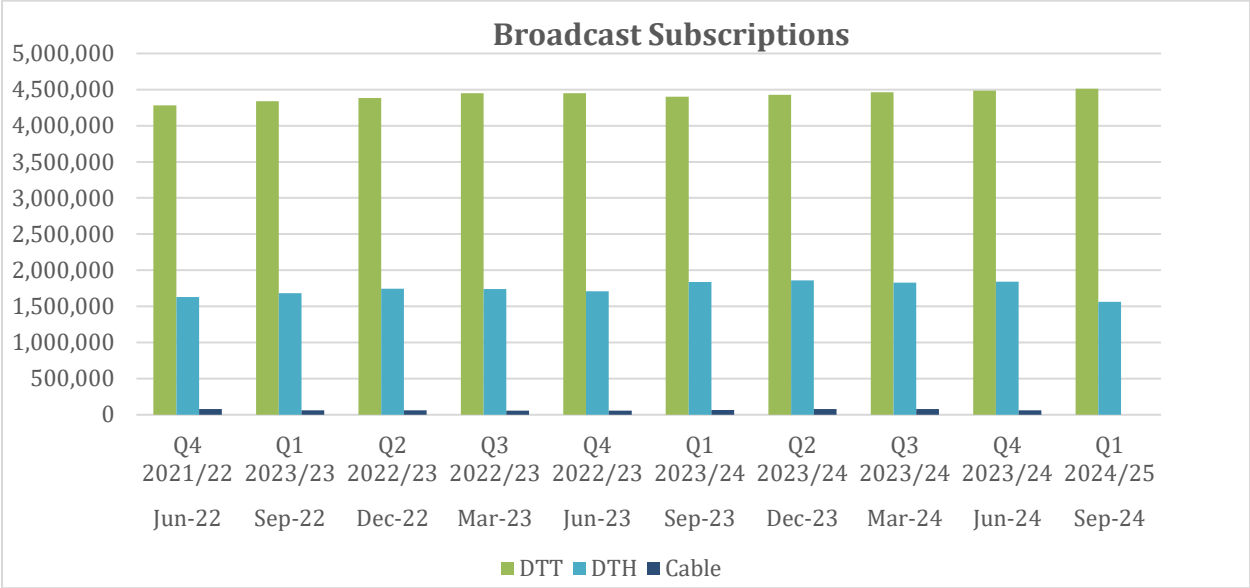


Figure 2: Trend in subscriptions for broadcasting services

As of 30th September 2024, Digital Terrestrial Television (DTT) remained the most popular platform to access subscription broadcasting services at 4,510,423 subscriptions, followed by Direct-To-Home (DTH) with 1,562,638 subscriptions accounting for 73.53 per cent and 25.48 per cent of the total number of subscriptions to broadcasting services respectively.

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 0.99 per cent 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 0.53 per cent to stand at 23,504, compared to a 21,655 increase in the previous quarter, resulting in a total of 4,510,423 while the subscriptions to DTH services decreased by 15.2 per cent (279,059), reaching a total of 1,562,638 subscriptions.

Cable broadcasting subscription services grew by 2.2 per cent to stand at 60,894. Overall, the total subscriptions to broadcasting services decreased by 254,237 (3.9 per cent) to a total of 6,133,955 subscriptions at the end of September 2024 from **6,388,192** reported in the previous quarter.

c) Digital Terrestrial TV (DTT) Population Coverage

During the quarter, the DTT population coverage remained unchanged at 91.91 per cent.

IV. BROADCAST CONTENT STANDARDS PERFORMANCE

During the period July to September 2024, the Authority monitored a total of 38 TV broadcasting stations and 20 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 decreased from 90 per cent to 88.46 per cent, while compliance with the programming guidelines for the watershed period, children protection religious programming guidelines stood at 100 per cent, while that of accessibility to broadcasting services by PWDs was at 93.75 per cent. The overall compliance level with TV broadcasting code marginally increased from 93.08 per cent to 94.69 per cent.

With respect to radio broadcast stations, the compliance levels with programming guidelines for the watershed period increased from 79.17 per cent to 90 per cent, while children's programming and good taste and decency stood at 98 per cent. The overall compliance level with radio broadcasting code increased from 92.1 per cent to 97 per cent.