



SECOND QUARTER BROADCASTING SERVICES REPORT FINANCIAL YEAR 2024/25

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EXECUTIVE SUMMARY

During the period under review, a total of eighteen (18) were issued to broadcasting service providers for radio and television broadcasting services while eighteen licences were revoked retaining the total number of licensed broadcasting service providers at six hundred and eighty-four (684) as of 31st December 2024. The total number of broadcasters who were operational is 241 TV and 255 FM radio stations as the end of the second quarter.

The total subscriptions to broadcasting services increased by 58,756 (1%) to a total of **6,192,711** at the end of December 2024 from **6,133,955** reported in the previous quarter. Subscriptions to DTT grew by 24,502 (0.54%) to a total of 4,534,925 while the subscriptions to DTH services increased by 31,599 (2.2%) to a total of 1,594,237 subscriptions. The subscription to cable broadcasting services grew by 2,655 (4.4%) resulting in a total of 63,549. DTT population coverage was at 91.96% as at the end of December 2024.

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 94.69% to 97.41%, while for radio broadcasting, the compliance level registered a marginal increase from 97% to 98.6% compared with the first quarter of financial year 2024/2025.

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 second quarter of FY 2024/25.

II. STRATEGIC IMPLICATIONS

In its Strategic Plan 2023-27, the Authority has committed to ensuring compliance by licensees with regulatory requirements.

III. THE BROADCASTING MARKET

a) Licences issued during the Quarter

The Authority issued eighteen (18) new licenses compared to 37 licences that were issued in the preceding quarter. Figure 1 provides the trend in the number of licences issued in various categories.

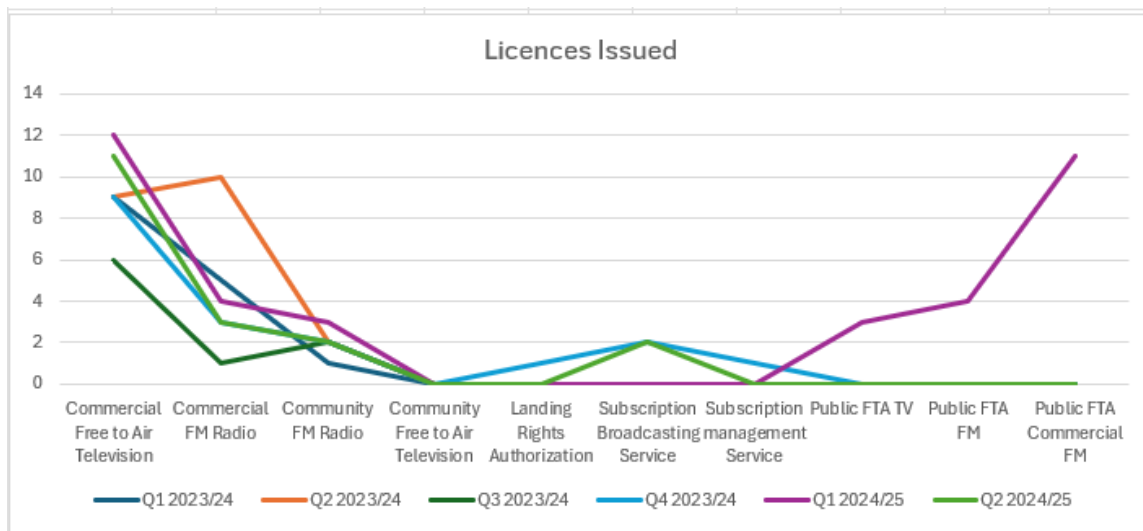


Figure 1: Trends on the number of licenses issued

The licences issued were 11 for commercial Free to Air (FTA) TV broadcasting services, three (3) for commercial FM radio broadcasting, two (2) for community FM radio, and two (2) for Subscription Broadcasting Services.

At the same time, 18 broadcasting licenses were revoked in the quarter, bringing the cumulative number of licenses issued under the broadcasting sub-sector to 684 as at end of the second quarter of the financial year 2024/25.

b) Subscription to the Broadcasting Services

During the second quarter, the total subscriptions to broadcasting services increased by 1% percent to a total of 6,192,711 from 6,133,955 reported at the end of Q1 FY 2024/25. Figure 2 illustrates the trend in subscriptions for broadcasting services from Q2 of FY 2022/23 to the end of Q2 of FY 2024/25.

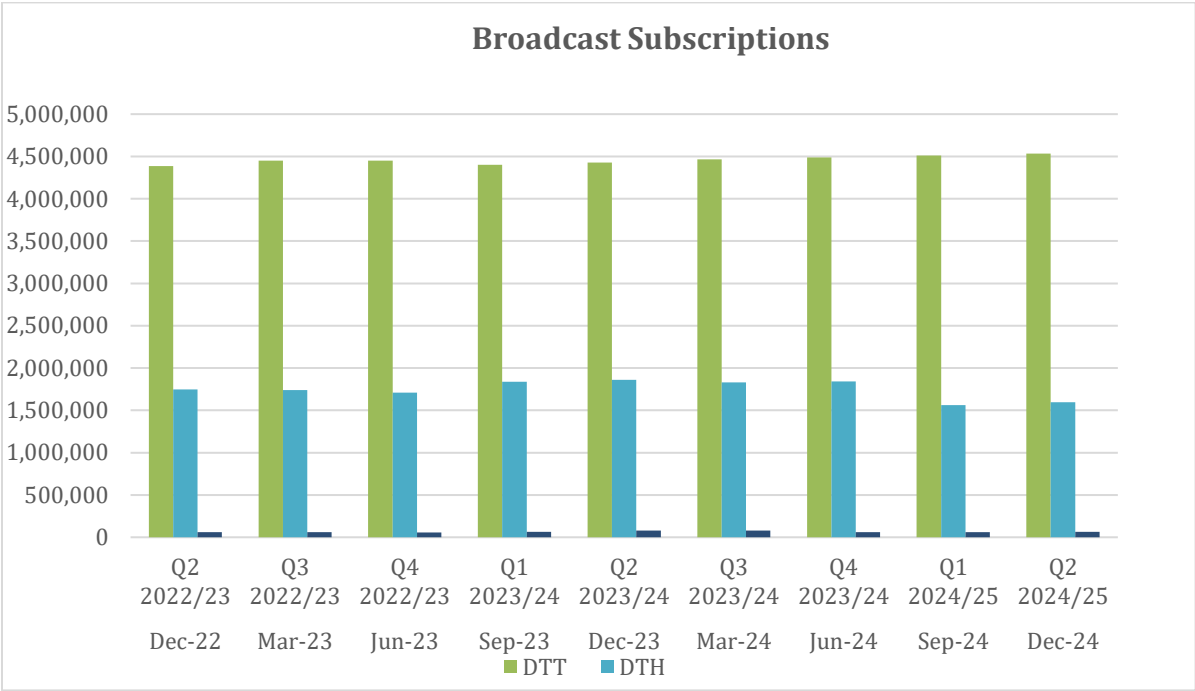


Figure 2: Trend in subscriptions for broadcasting services

The DTT remained the most popular platform to access subscription broadcasting services with 4,534,925 subscriptions followed by DTH with 1,594,237 subscriptions accounting for 73.23% and 25.74% of the total number of subscriptions to broadcasting services respectively as at end of 31st December 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 1.03% 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 24,502, representing a 0.54% jump, compared to an increase of 23,504, a 0.53% rise, in the previous quarter, resulting in a total of 4,534,925 while the subscriptions to DTH services increased by 31,599 (2.02%), resulting in a total of 1,594,237 subscriptions. The subscription to cable broadcasting services grew by 2,655 (4.4%) resulting in a total of 63,549. Overall, the total subscriptions to broadcasting services increased by 58,756 (1%) to a total of **6,192,711** subscriptions at the end of December 2024 from **6,133,955** reported in the previous quarter

c) Digital Terrestrial TV (DTT) Population coverage

During the quarter, DTT population coverage stood at 91.96%.

IV. BROADCAST CONTENT STANDARDS PERFORMANCE

During the period October to December 2024, the Authority monitored a total of twenty-nine (29) TV broadcasting stations and 21 FM radio 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, protection of children, good taste and decency, hate speech, local content, accessibility for persons with disabilities and broadcast competitions.

The compliance levels with minimum local content quota increased from 88.46% to 94.83%, while compliance with the programming guidelines for the watershed period, protection of children, good taste and decency, and hate speech stood at 100%, while that of accessibility to broadcasting services by PWDs was at 90.48%, and broadcast competition at 96.55%. The overall compliance level with TV broadcasting code marginally increased from 94.69% to 97.41%.

With respect to radio broadcast stations, the compliance levels with programming guidelines for the watershed period increased from 90% to 95.2%, while children's programming and good taste and decency stood at 100% and 99% respectively. The overall compliance level with radio broadcasting code increased from 97% to 98.6%