



**THIRD QUARTER BROADCASTING SERVICES REPORT
FINANCIAL YEAR 2024/25
(January-March 2025)**

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EXECUTIVE SUMMARY

During the period under review, a total of 26 licenses were issued to broadcasting service providers for radio and television broadcasting services, bringing the total number of licensed broadcasting service providers to 710 as of 31st March 2025. There were 253 TV and 265 FM radio stations that were operational as at the end of the third quarter of FY 2024/2025.

The subscriptions to broadcasting services increased by 1.05 per cent to 6,257,538 as at the end of March 2025 from 6,192,711 reported in the previous quarter. Subscriptions to Digital Terrestrial Television (DTT) slightly grew by 0.25 per cent to 4,546,041 while the subscriptions to Direct-to-Home (DTH) services grew by 3.65 per cent to a total of 1,655,842 subscriptions. On the other hand, subscription to cable broadcasting services declined by 12.42 per cent to stand at 55,655. As of the end of the quarter, the DTT population coverage was 92.01 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 living with disabilities. The compliance levels for TV broadcasting increased from 94.69 per cent to 97.41 per cent, while for radio broadcasting, the compliance level registered a marginal increase from 97 per cent to 98.6 per cent compared with the second quarter of financial year 2024/2025.

1. 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 third quarter of FY 2024/25.

2. STRATEGIC IMPLICATIONS

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

3. THE BROADCASTING MARKET

3.1. Licenses issued during the Quarter

The Authority issued 26 new licenses compared to 18 licences that were issued in the preceding quarter. Figure 1 provides the trend in the number of licences issued in various categories.

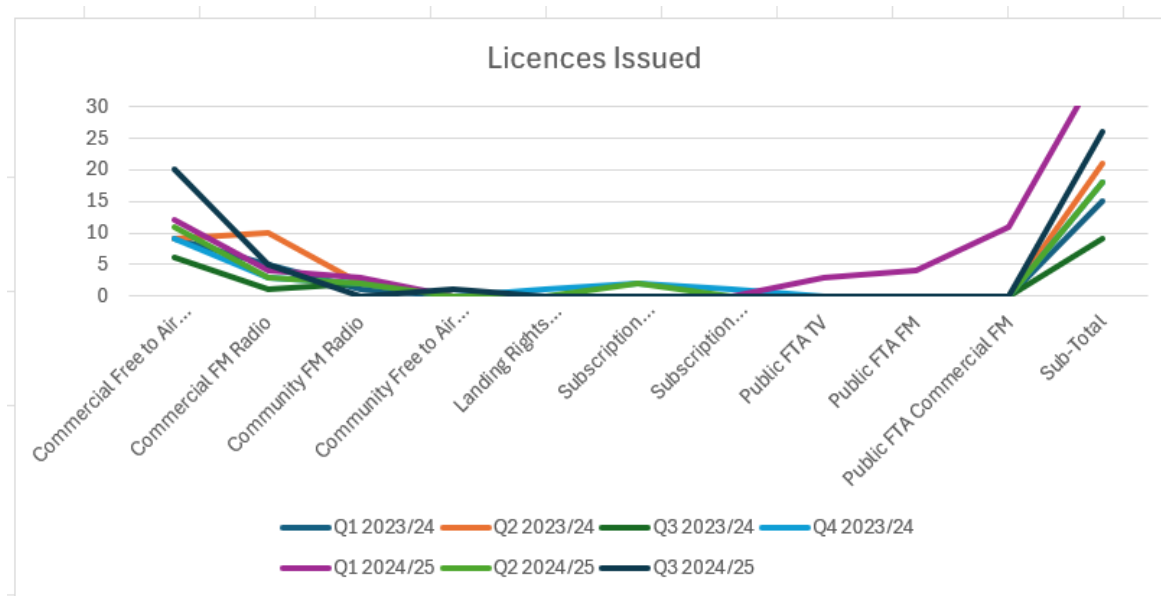


Figure 1: Trends on the number of licenses issued

Out of the 26 licenses issues, 20 were for commercial Free to Air (FTA) TV broadcasting services, five (5) for commercial FM radio broadcasting, and one (1) for community Free-to-Air (FTA) TV,

bringing the cumulative number of broadcasting licenses issued as at end of the third quarter of the financial year 2024/25 to 710.

3.2. Subscription to the Broadcasting Services

During the third quarter, the total subscriptions to broadcasting services increased by 1.05 per cent to a total of 6,257,538 from 6,192,711 reported at the end of quarter 2 of FY 2024/25. Figure 2 illustrates the trend in subscriptions for broadcasting services for the last eight quarters to the period ending 31st March 2025.

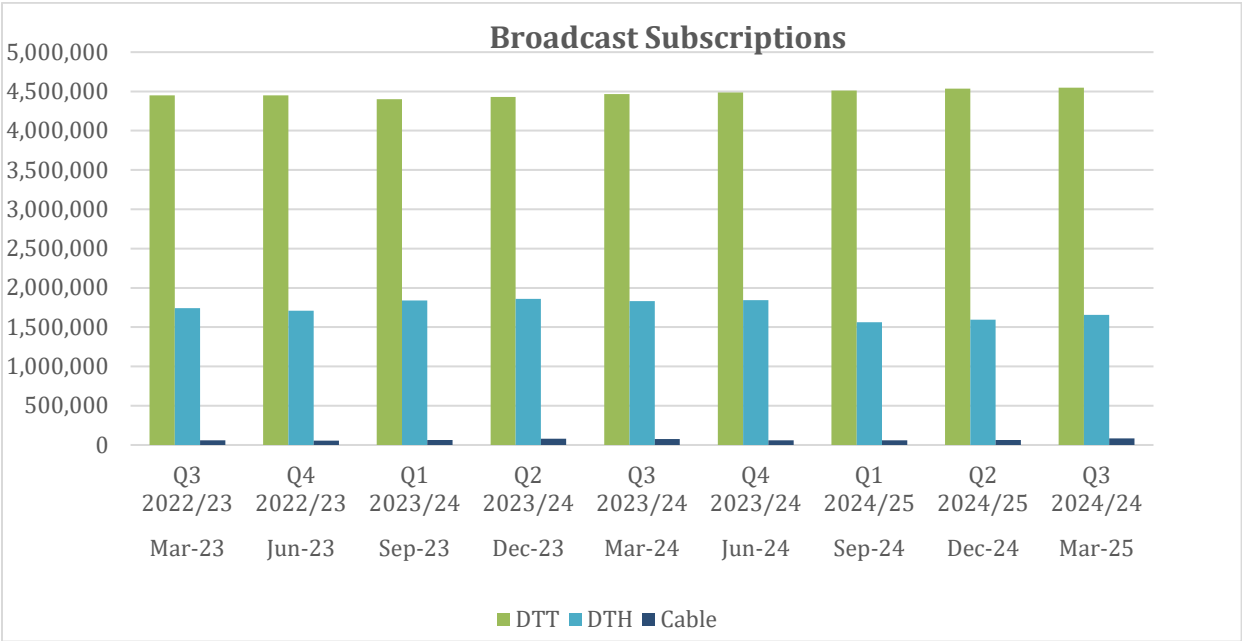


Figure 2: Trend in subscriptions for broadcasting services

DTT remained the most popular platform to access subscription broadcasting services with 4,546,041 subscriptions followed by DTH with 1,655,842 subscriptions accounting for 72.65 per cent and 26.46 per cent of the total number of subscriptions to broadcasting services respectively as at end of 31st March 2025.

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 0.89 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 0.25 per cent to stand at 4,546,041, while the subscriptions to DTH services increased by 3.86 per cent, resulting in a total of 1,655,842 subscriptions. The subscription to cable broadcasting services declined by 12.42 per cent to a total of 55,655. Overall, the total subscriptions to broadcasting services increased by 1.05 per cent to **6,257,538** subscriptions at the end of March 2025 compared to **6,192,711** reported in the previous quarter.

3.3. Digital Terrestrial TV (DTT) Population coverage

During the quarter, the DTT population coverage stood at 92.01%.

4. BROADCAST CONTENT STANDARDS PERFORMANCE

During the period January to March 2025, the Authority monitored a total of 39 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 decreased to 74.49 per cent, while compliance with the programming guidelines for the watershed period, appropriate content stood at 97.44 per cent. The compliance level with respect to broadcast competitions was 82.86 per cent while that of accessibility to broadcasting services by PWDs was at 96.67 per cent. The overall compliance level with TV broadcasting code decreased to 95.02 per cent, down from 97.41 per cent reported in the previous quarter.

With respect to radio broadcast stations, the compliance levels with programming guidelines for the watershed period increased marginally from 95.2 per cent to 95.24 per cent, while children's programming and good taste and decency stood at 100 per cent and 99.05 per cent respectively. The overall compliance level with radio broadcasting code decreased slightly from 98.6 per cent to 98.57 per cent.