

FY 2018/19 Quarter 1
(July –September 2018)
Broadcasting Report

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FY 2018/19 QUARTER 1 (JULY – SEPTEMBER 2018) BROADCASTING REPORT

I INTRODUCTION

The ICT sector law mandates the Communications Authority of Kenya (the Authority) with regulating broadcasting services in Kenya. This mandate includes issuing licenses for various broadcasting services, administering the broadcasting content aspects of the ICT Law, developing media standards, and regulating and monitoring compliance with these standards. This report gives an overview of the performance of the broadcasting services during Quarter 1 FY 2018/19.

II STRATEGIC IMPLICATIONS

In the Corporate strategic plan, the Authority has identified compliance to regulatory requirements as one of the strategic objectives. In an effort to ensure compliance, the Authority monitors broadcasters compliance with license requirements as per the ICT Law.

III OVERVIEW OF THE BROADCASTING MARKET

1. FTA Broadcasting Services

The reach of commercial FTA radio was the greatest with 131 radio stations being on air, followed by Commercial FTA TV with 67 stations, Community FTA Radio with 42 and community FTA TV with only 1. This is represented graphically in Figure 1 below.

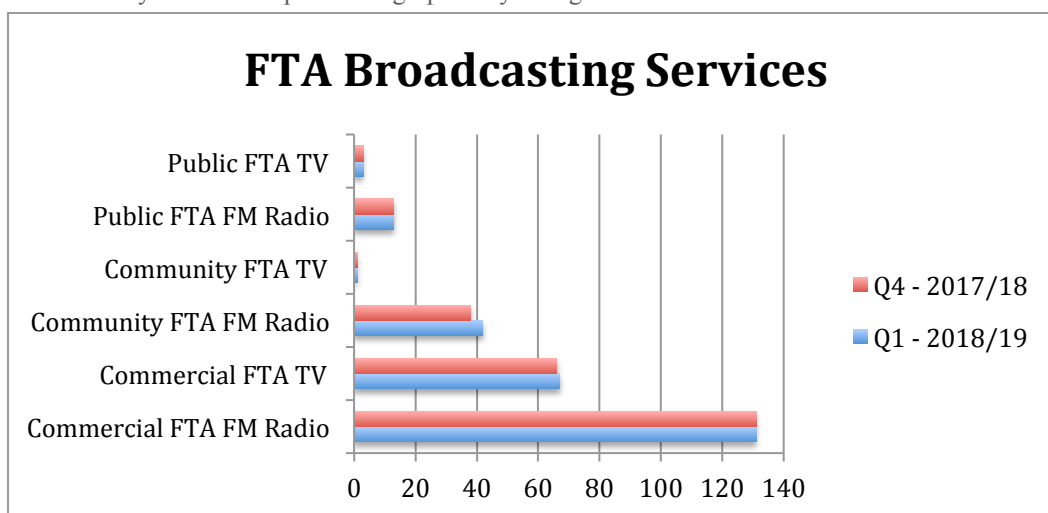


Figure 1: Comparison of on air FTA broadcasting services as at the end of Q1 FY 2018/19 vs Q4 FY 2017/18

2. Subscription Broadcasting Services

On Subscription Broadcasting Services, Terrestrial subscription broadcasting services had the highest subscriber base with 3,848,423 subscribers, followed by Satellite at 1,036,555, and Cable at 155,453 subscribers as shown in Figure 2.

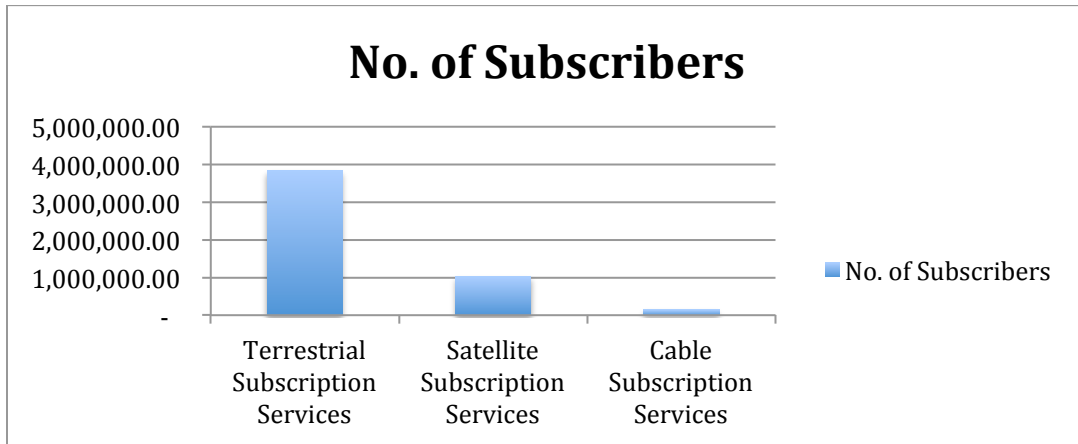


Figure 2: Subscriptions Broadcasting Services 1st Quarter FY 2018/19

As shown in Fig 3 below, DTH (Satellite) broadcasting, Cable broadcasting, and Digital Terrestrial subscription services recorded a growth of 41,540, 2,989, and 38,319 subscribers respectively.

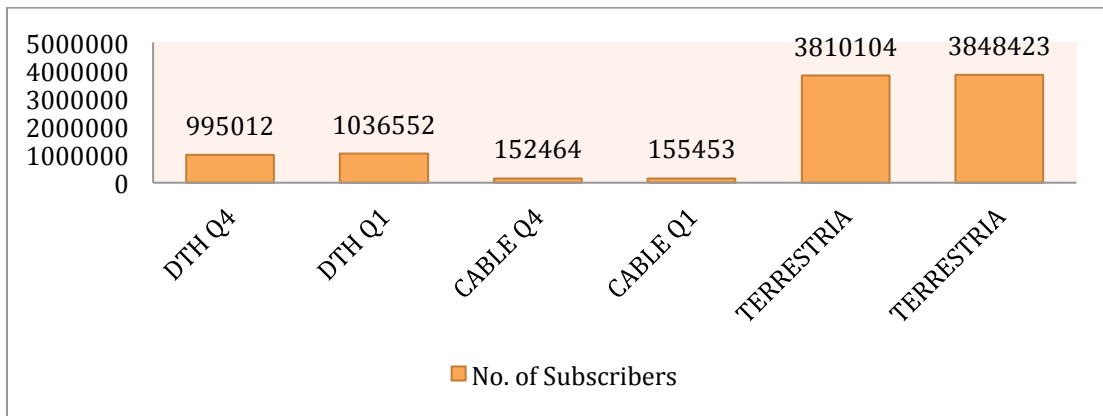


Figure 3: Growth in Subscription Broadcasting Services: Q4 2017/2018 v/s Q1 2018/19

Terrestrial subscription still has the largest number of subscribers, which can be attributed to the affordability of subscription bouquets in the platform compared to Satellite subscriptions. In addition, the initial set up costs for the subscription broadcasting services may be a determinant of the number of subscribers on the various subscription services, with terrestrial requiring the least set-up cost as compared to Satellite and Cable broadcasting services.

3. Broadcasting Signal Distribution Services –Population coverage

The overall Digital Terrestrial Television (DTT) broadcasting population coverage stood at 86% by the end of the first Quarter i.e. 30th September 2018.

IV BROADCAST CONTENT MONITORING PERFORMANCE

The table below shows a summary of the levels of compliance with the various monitored parameters during the quarter. Performance is based on an analysis of 47 out of 60 FTA TV stations.

Table 1: Summary of Broadcast Content Monitoring Performance during Q1 FY 2018/19

REQUIREMENT	No. of Compliant TV stations	No. of Non-Compliant TV Stations	% Compliant Quarter 1 2018/19	% Compliant Quarter 4 2017/18
Local content quota requirement of 40%	43	4	92	83.3
PWDs sign language insert requirement	24	1	96	96
Advertisement (maximum limit of 10 minutes in every 30 minutes of TV programming)	47	0	100	100
Advertisements (40% local) requirement	47	0	100	100
Children’s programs requirement of at least 5hrs per week	6	41	13	12.5
Appropriate content requirement during the watershed period	45	2	96	100

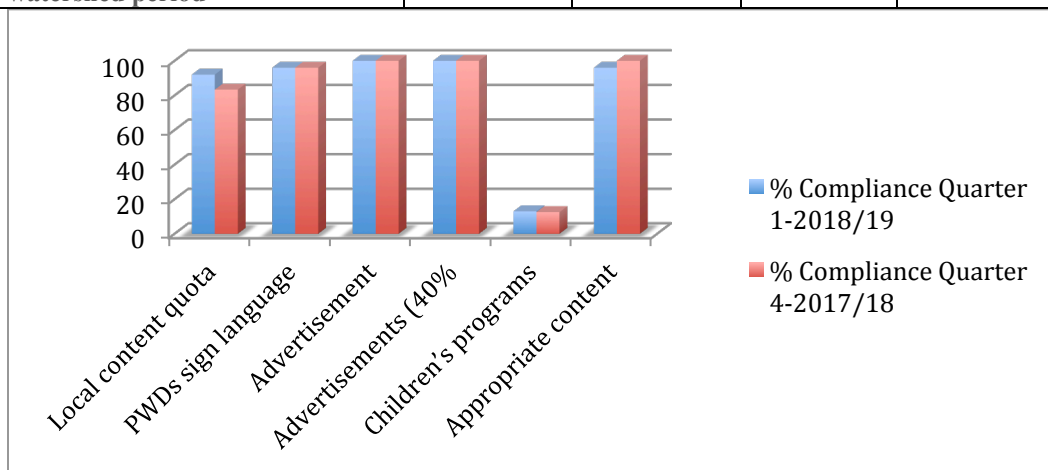


Figure 4: comparison of compliance levels in quarter 1-FY 2018/19 vis a vis quarter 4 FY 2017/18

V ANALYSIS OF THE FINDINGS

1. Local Content Quota Compliance

43 of the 47 TV stations monitored met the 40% local content quota threshold. This means that, 92% of the stations monitored were compliant with the 40% quota requirement. This is an increase from last quarter’s performance of 83.3 %. This improvement is attributed to the engagement of the Authority with non-compliant stations, which resulted in more broadcasters increasing the amount of local content in their programming.

Table 2: Summary of Local Content Performance during Q1 FY 2018/19

Local Content Quota (%)	Number of broadcasters (1 st Quarter 2018/2019)	Number of broadcasters (4 th Quarter 2017/2018)	Number of broadcasters (3 rd Quarter 2017/2018)	Number of broadcasters (2 nd Quarter 2017/2018)
≥ 40	43	39	36	42
30 to < 40	2	3	5	4
20 to < 30	0	4	5	2
10 to < 20	1	0	1	1
<10	1	2	1	2

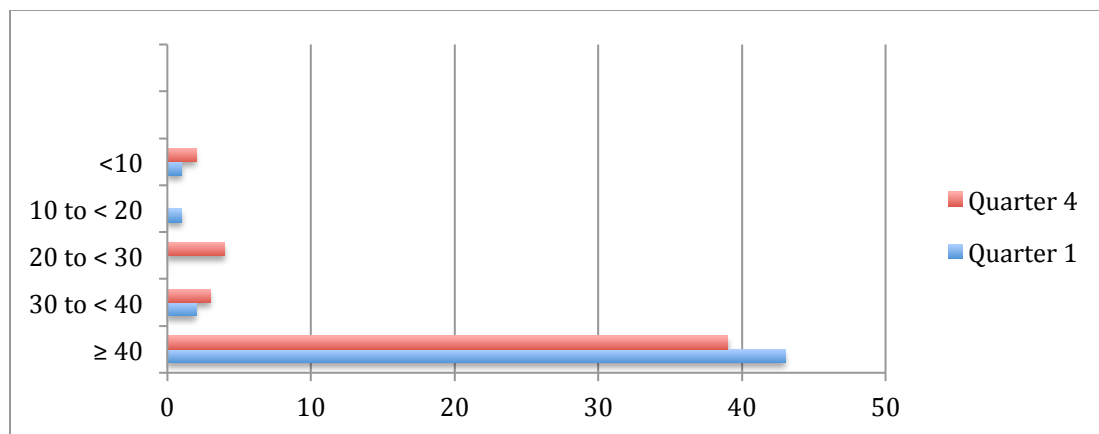


Figure 5: Local Content Quota compliance

Performance of the various genres of Local Content

The results in this quarter show that Music had the highest weekly average of 34.4 % while religious content, as a genre was rated second with a weekly average of 21.8 % in local programming. Talk shows came in third at 15.6 %. Sports, comedy, and drama had the lowest local content across most of the stations monitored during the review period registering 0.6%, 2% and 3.1% respectively.

Table 3: Performance of the various genres of local content

Genre	1 st Quarter 2018/2019(%)	4 th Quarter 2017/2018(%)	3 rd Quarter 2017/2018(%)
Music	34.3	38.8	37.2
Religious	21.8	17.7	20.5
Talk shows	15.6	17.3	18.2
Children	5.3	5.5	4.6
Reality	3.1	5.3	4.3
Drama	2	2	2.1
Comedy	0.7	0.8	1
Docs/Educ	5.6	3.3	3.6
Sports	0.6	0.6	0.7
Current affairs	3.5	7.3	2.2
Magazine	7.4	3.2	5.6

Performance of the various genres during prime time

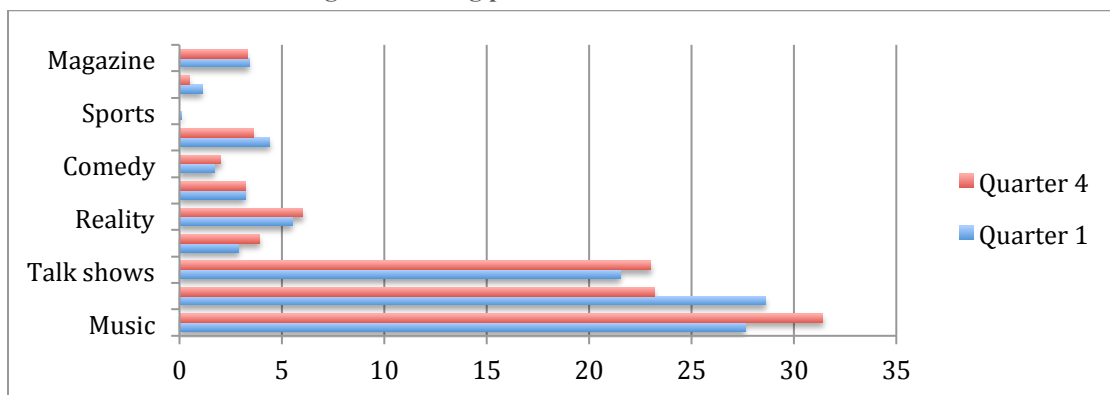


Figure 6: Performance of the various genres of local content during prime time

The results in this quarter show that Religious programs had the highest weekly average of 28.6%, music content came in second at 27.6% and talk shows third at 21.5%. Sports, comedy and current affairs genres had the lowest local content across most of the stations monitored during the period under review registering 0.1%, 1.1% and 1.7 % respectively.

2. Accessibility To Broadcasting Services By Persons With Disabilities

On accessibility to broadcasting services by PWDs, twenty-four (24) out of twenty-five (25) TV stations with news complied. The level (96%) of compliance is due to monitoring of performance and sharing the findings with broadcasters on quarterly basis in cases of non-compliance.

3. Inappropriate Content During The Watershed Period

During the period under review, only two stations contravened this requirement. The level (96%) of compliance is due to the engagements with broadcasters on the expectations and requirements of the broadcasting content standards, and sharing performance on quarterly basis.

4. Children’s Programs Requirement Of At Least 5 Hours Per Week

On 5 hours of children’s programming, six (6) stations were compliant with this requirement as was the case in the previous quarter. The low level of compliance in Children programming requirement is attributed to the cost implication associated with complying with this standard and the trend for broadcasters to move from general programming to niche programming also poses an additional challenge since programming for such niche stations may not be children oriented.

Table 4: Children’s programs requirement of at least 5 hours per week

Duration of Children Programming (Minutes)	Number of broadcasters (1 st Quarter 2018/2019)	Number of broadcasters (4 th Quarter 2017/2018)	Number of broadcasters (3 rd Quarter 2017/2018)	Number of broadcasters (2 nd Quarter 2017/2018)
≥ 30 and <100	9	9	6	10
≥100 and <300	11	11	13	9
≥300	6	6	6	9

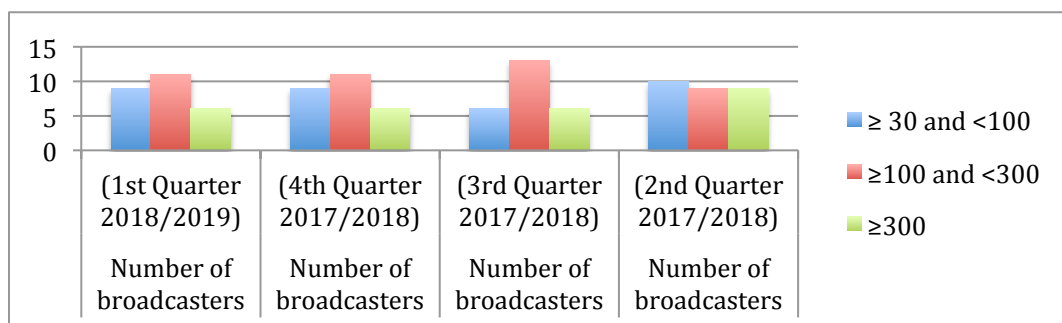


Figure 7: Children’s programs requirement of at least 5 hours per week

5. Radio

During the quarter, the Authority monitored a sample of twelve radio stations (12) and established that only one of the stations aired inappropriate content. The level of compliance (83%) is due to the engagements with broadcasters on the expectations and requirements of the broadcasting content standards, and sharing the level of performance on quarterly basis in cases of non-compliance.

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