



COMMUNICATIONS
AUTHORITY OF KENYA

BROADCAST SECTOR REPORT

Q1 2022/2023

www.ca.go.ke



info@ca.go.ke



Executive Summary

As of 30th September 2022, a total of 29 television and radio broadcasting service providers were licensed during the quarter, making the overall number of licensed broadcasting services to 569 providers.

There was, however, no growth in DTT population coverage during the quarter since work on all the planned new DTT transmission sites was not yet completed.

During the quarter, subscriptions to broadcasting services grew by 91,839 to a total of 6,080,470 subscribers. The Authority assessed broadcasters' performance on the standards outlined in the Programming Code. Priority was given to election coverage, hate speech, local content, children's programming, and access to broadcasting content by persons with disabilities (PwDs).

The Authority has classified TV stations into eleven different categories namely, Current affairs, Talk shows, Children, Reality, Music, Religious, Drama, Comedy, Documentary/Features, Sports and Magazine. During the first quarter, the Authority monitored a total of fifty-six (56) FTA TV and twenty-four (24) FM Radio stations and established that:

- a) The proportion of stations that met the 40% Local Content quota stood at 94.6%
- b) On accessibility to broadcasting services by PwDs, all the stations monitored were found to be compliant with this requirement.
- c) No TV station contravened advertisement and religious programming requirements
- d) One radio station contravened the appropriate content requirement during the watershed period and the associated regulatory action was taken against it.
- e) On election coverage, none of the stations monitored was found to be non-compliant with the Authority's requirements on election coverage.

However, it was noted that some TV broadcasters were not consistent in displaying the sign language interpreter insert on their platforms. The Authority therefore sent a communiqué to all broadcasters reminding them of this important obligation in order to enable persons with disabilities to have access to information, as the elections was an event of national importance.

Introduction

The ICT sector law mandates the Communications Authority of Kenya (the Authority) with promoting and facilitating the development of a diverse range of broadcasting services in Kenya. This mandate includes issuing licenses for various broadcasting services, facilitating the development of Kenyan programmes, administering the broadcasting content aspects of the ICT Law, developing media standards, and regulating and monitoring compliance with these standards.

In addition, the Authority promotes the observance of public interest in broadcasting services and ensures that broadcasters provide an internal mechanism for disposing of complaints related to broadcasting services.

This report gives an overview of the performance of the broadcasting services during the first quarter of FY 2022/23.

Strategic Implications

In its Strategic Plan 2018-23, the Authority, under Key Result Area (KRA) on Access and Market Development, committed to achieving efficient ICT markets by fostering competition in the ICT sector through licensing of additional operators and service providers.

Further, in furthering the strategic objective of ensuring compliance with regulatory requirements, the Authority monitors broadcasters' compliance with content standards as set out in the Programming Code and license requirements as per the regulatory framework in force



Broadcasting Market

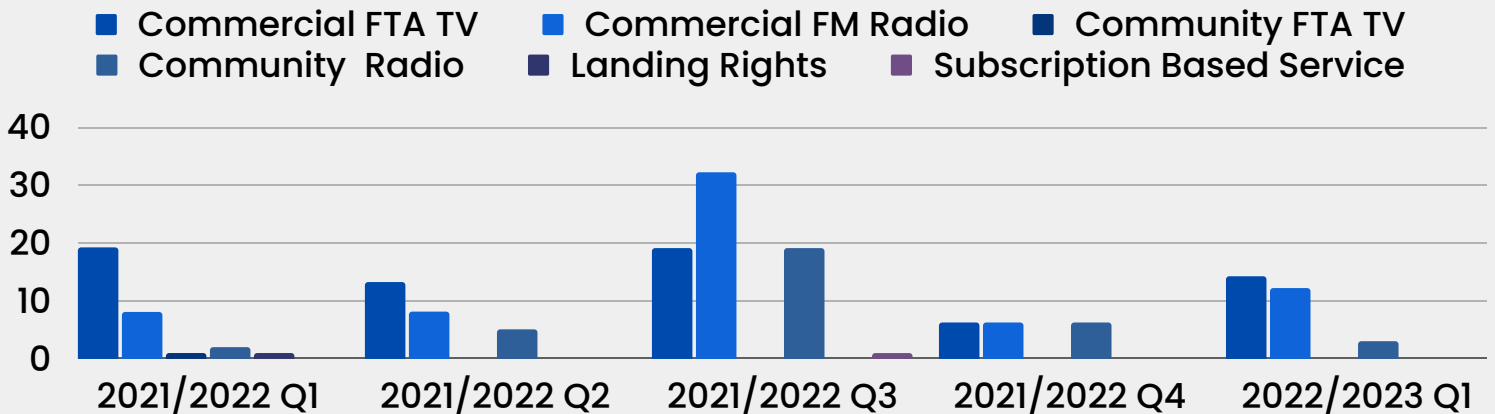
The Authority committed to increasing the number of broadcast licensees by at least 100 new licensees during the FY 2022/23. To realize this, the Authority continued processing broadcasting service license applications issuing a total of 29 licensees during the first quarter of the financial year. Table 1 provides the breakdown of types of licenses issued, comparing with the previous financial year.

There is still a consistent growth in the number of licensees over the quarterly reporting periods from the previous financial year to the current. The highest growth is in the commercial FTA television category, with the commercial FTA radio category having the second highest growth.

This growth is attributed to the availability of channels on the licensed digital terrestrial television platforms and reduced market barriers that has continued to encourage investment into the sector.

It is also worth noting that the majority of the licensees in the radio broadcasting category are among the broadcasters that held broadcast frequency assignments but failed to obtain the requisite broadcasting service licenses. The broadcasters have since complied following the Authority's notices to commence regulatory enforcement initiated during the FY 2021/22.

Bar Graph illustrating License Categories

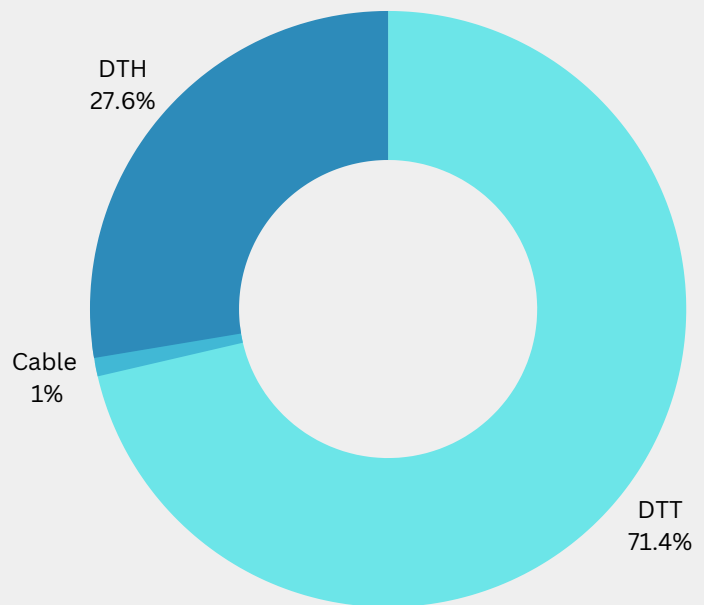


Market Analysis

During the first quarter, subscriptions to broadcasting services grew by 91,839 (about 1.5% over the quarter) to 6,080,470 from 5,988,632 at the end of June 2022. Figure 3 illustrates the trend in subscriptions for broadcasting services for the four quarters to the end of Q1 of FY 2022/23

DTT remained the most popular platform used by consumers for accessing subscription broadcasting services accounting for 71.5 % of the total number of broadcasting subscriptions as at the end of Q1 FY 2022/23. This may be mainly attributed to the affordability of the DTT services resulting in mass access by the lower market segments. Access to television through cable medium remained the least popular with only 1.3% of subscriptions being for cable television services which could be attributed to the low cable footprint driven mainly by the high cost of setting up the infrastructure

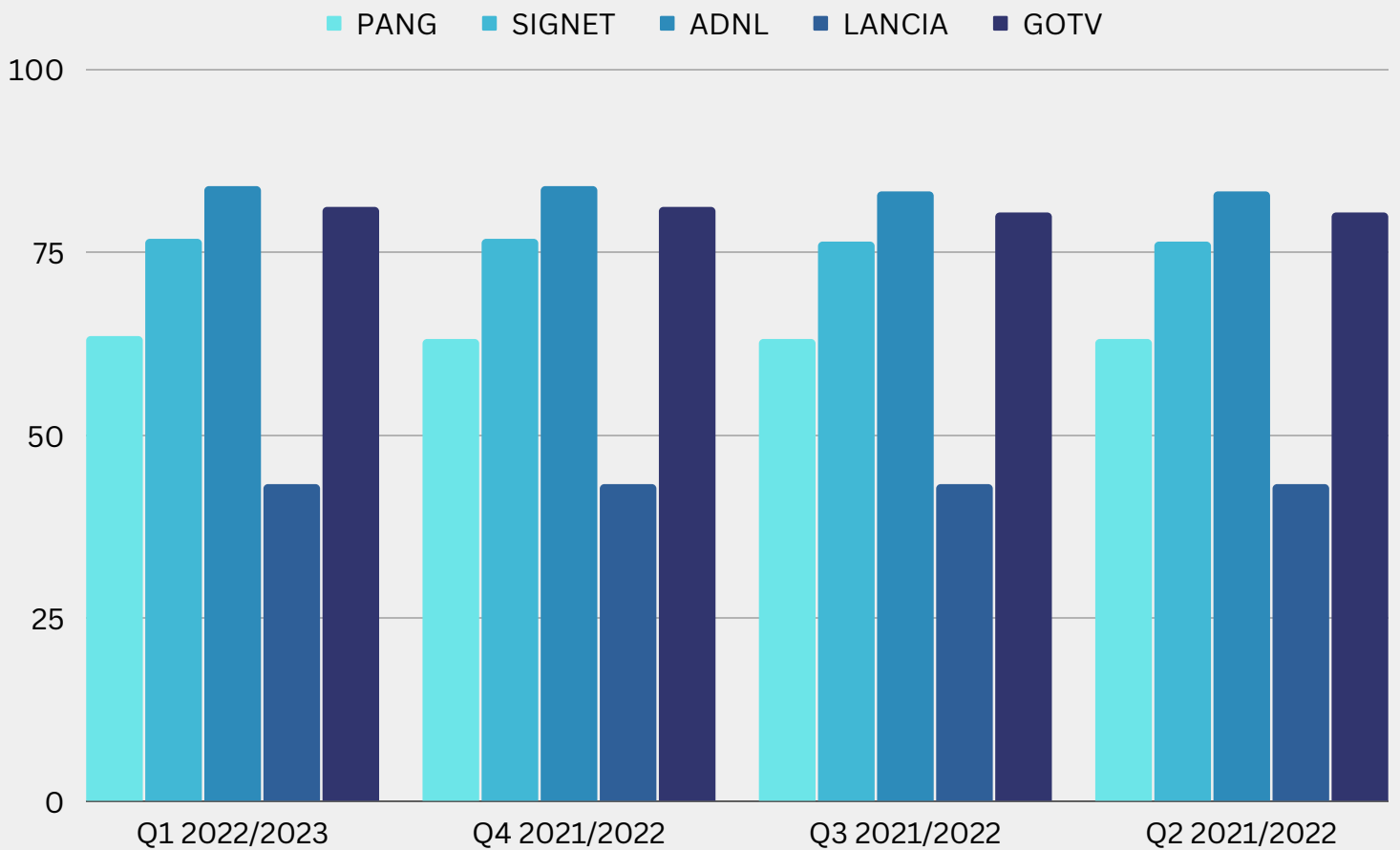
During the quarter, subscriptions to DTT grew by 54,633 which was nearly the same as the 55,412 growth reported in Q4 of the previous financial year. Subscriptions to DTH services also grew by 52,883 reversing the decline of 61,109 which was attributed to the change in methodology used from cumulative number of decoders sold to subscription figures reported by the service providers. The subscription to cable broadcasting services, however, sustained its decline experiencing a negative of 17.3%.



Digital Terrestrial Coverage

In the current fiscal year, the Authority aims to increase DTT population coverage from 92.0 to 92.4 % by the end of June 2023. There was no change in DTT population coverage during the quarter as shown in Table 4 below. The Authority continues to monitor the progress of installation work in some sites which is expected to lead to increased coverage upon commissioning.

Graph illustrating digital terrestrial coverage





CONTENT

Broadcast Content Performance

The Authority assessed broadcasters performance on the following standards outlined in the Programming Code:

- Election coverage
- Hate speech
- Local content
- Accessibility to broadcasting services by Persons with Disabilities (PWDs)
- Protection of minors
- Religious programmes
- Crime and crisis situations
- Advertising

During the quarter under review, the Authority monitored fifty-six (56) FTA TV and twenty-four (24) FM stations. Priority was given to local content, access to broadcasting content by Persons with disabilities, advertisement and inappropriate content as they are of public interest and therefore have a higher magnitude to the public as detailed in the quarter report.

For the purpose of election monitoring, priority was given to stations whose programming covered election related content and no contravention was observed.

The stations monitored include those that do general programming, news & current affairs, niche stations that air news, the public broadcaster, religious stations with current affairs programming and stations with outstanding non-compliances

During the monitoring exercise in Quarter 1, it was established that fifty-three (53) of the fifty-six (56) TV stations monitored met the 40% threshold. This means that, 94.6% of the stations monitored were compliant with the 40% quota requirement. The stations that did not comply with the 40% local content threshold were three (3).

The TV stations with the highest local content during the watershed period were JCDH, Faith TV and PPP TV registering 94%, 74% and 70.8% respectively.



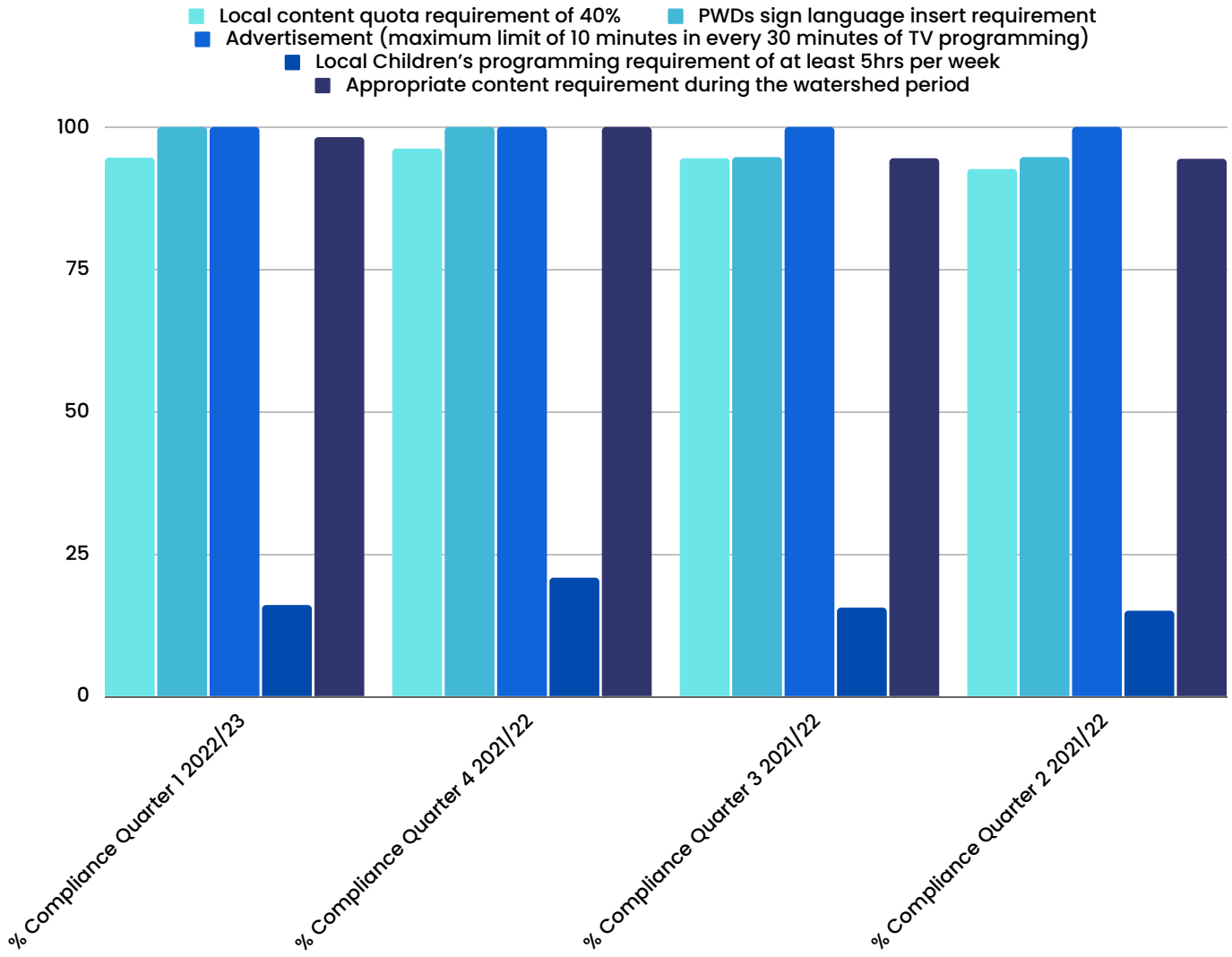
Broadcasters were in compliance with advertisement requirements with no advert exceeding the mandated 10 minutes of every 30 minutes of advertisements. On accessibility to broadcasting services by PWDs, none of the seventeen (17) TV stations that air news and programs of national importance was found to be non-compliant with this requirement.

The TV stations that were compliant with the 5 hours of local children's programming this quarter were nine (9) (16.0%). This was a slight decrease from the previous quarter, which registered eleven (11) (19.6%) broadcasters that complied with the requirement.

In respect to radio stations, twenty-four (24) radio stations were monitored and only one was found to be non-compliant with the appropriate content requirement during the watershed period.



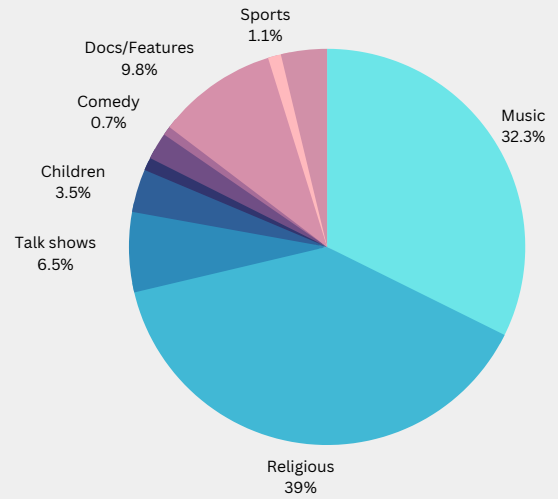
Graph illustrating Compliance levels



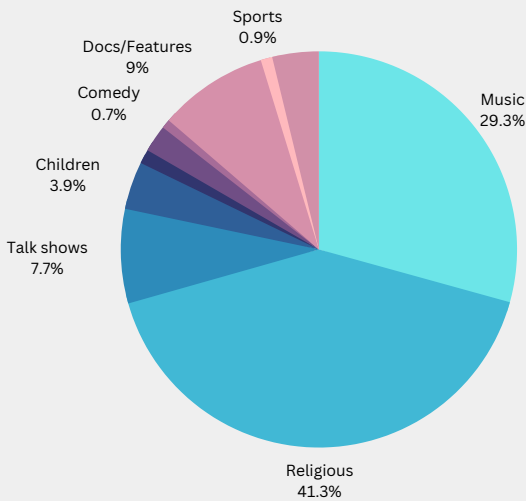
Genre Performance

During this quarter show that religious content had the highest weekly average of 42% while music programming was rated second with a weekly average of 27.7%, talk shows came in third at 7.7%. Comedy, reality and drama had the lowest local content across most of the stations monitored during the review period registering 0.7%, 2.1% and 2.4% respectively.

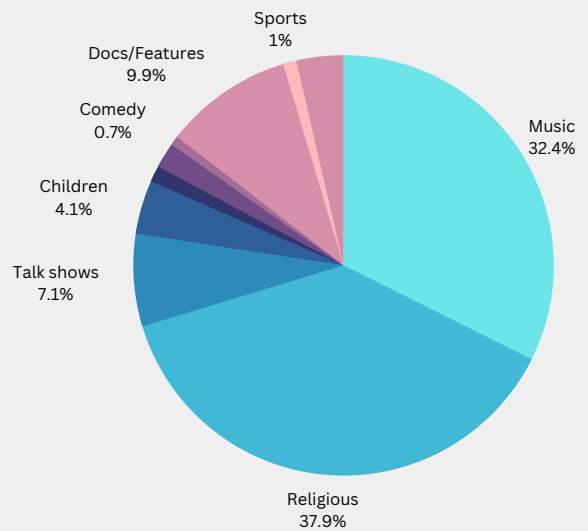
Pie Chart illustrating genre performance Q2 2021/2022



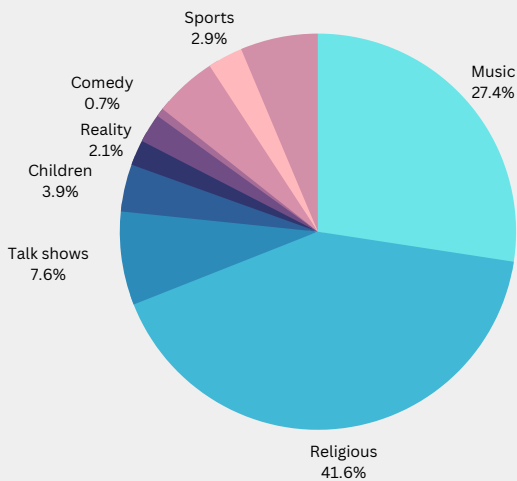
Pie Chart illustrating genre performance Q4 2021/2022



Pie Chart illustrating genre performance Q3 2021/2022



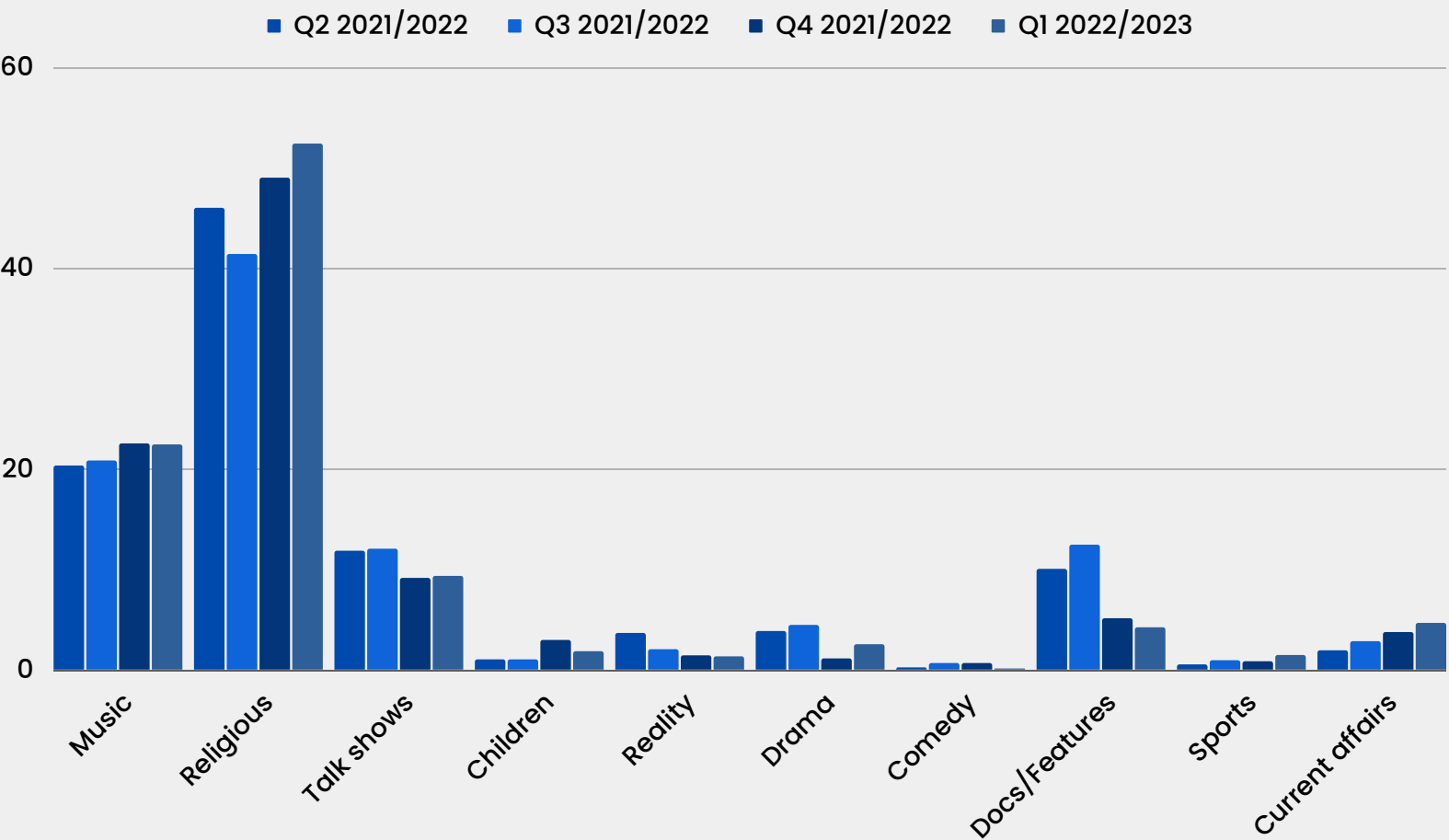
Pie Chart illustrating genre performance Q1 2022/2023



Prime Time Genre Performance

The results in this quarter show that religious programmes had the highest weekly average of 52.4%, music shows came in second at 22.4% and talk shows came in third at 9.3%. Comedy, sports and reality had the lowest local content across most of the stations monitored during the period under review registering 0.1%, 1.3% and 1.4% respectively

Graph illustrating genre performance during prime time





COMMUNICATIONS
AUTHORITY OF KENYA

Contact Us

+254-020-4242000

www.ca.go.ke

info@ca.go.ke

CA Centre Waiyaki Way

P.O. Box 1444-0800

