



**QTR 2 FY 2021/2022**  
**(October- December 2021)**

**BROADCASTING SERVICE REPORT**

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## EXECUTIVE SUMMARY

This report provides highlights of the activities undertaken by the Authority within the broadcasting sector for the quarter ending December 2021. During this period, a total of 26 licenses were issued for radio and television broadcasting services during the quarter.

The number of subscribers on Digital Terrestrial TV (DTT), Direct To Home Satellite (DTH satellite) and cable subscription broadcasting services grew by 1.9 per cent to bring the cumulative total number of subscriptions to 5,903,742 as at the end of quarter. DTH experienced the highest growth recording 55,911 subscriptions during the quarter.

The DTT population coverage increased by 0.07% arising from mapping of new Kabarnet DTT site and upgraded Hola DTT site, bringing the overall DTT population coverage to 91.28%. The target for this fiscal year is 92%.

With regard to broadcast content regulation, the performance was as follows:

- a) The compliance to the 40% Local Content quota stood at 92.6%
- b) On accessibility to broadcasting services by People With Disability (PWDs), one (1) out of the 19 TV stations that air news and programs of national importance was found to be non-compliant with this requirement.
- c) Three (3) TV stations contravened the appropriate content standards and the associated regulatory action was taken.
- d) No TV station contravened advertisement, religious programming, and/or appropriate content during the watershed period requirement. No FM station was found in contravention of the broadcasting standards

## **I. INTRODUCTION**

The ICT sector law mandates the Communications Authority of Kenya (CA) 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 internal mechanisms for addressing complaints related to broadcasting services.

This report gives an overview of the performance of the broadcasting services during the second quarter FY 2021/22.

## **II. STRATEGIC IMPLICATIONS**

In the Corporate Strategic Plan 2018-23, the Authority has committed to achieving efficient ICT markets by fostering competition in the ICT sector through licensing of additional operators and service providers. Further, in advancing the the strategic objective of ensuring compliance to 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

## **III. THE BROADCASTING MARKET**

### **1. Licensees issued in Q2 2021-2022**

Under the current strategic period, the Authority has targeted to license additional 100 new broadcasting service licensees in the current FY 2021/22.

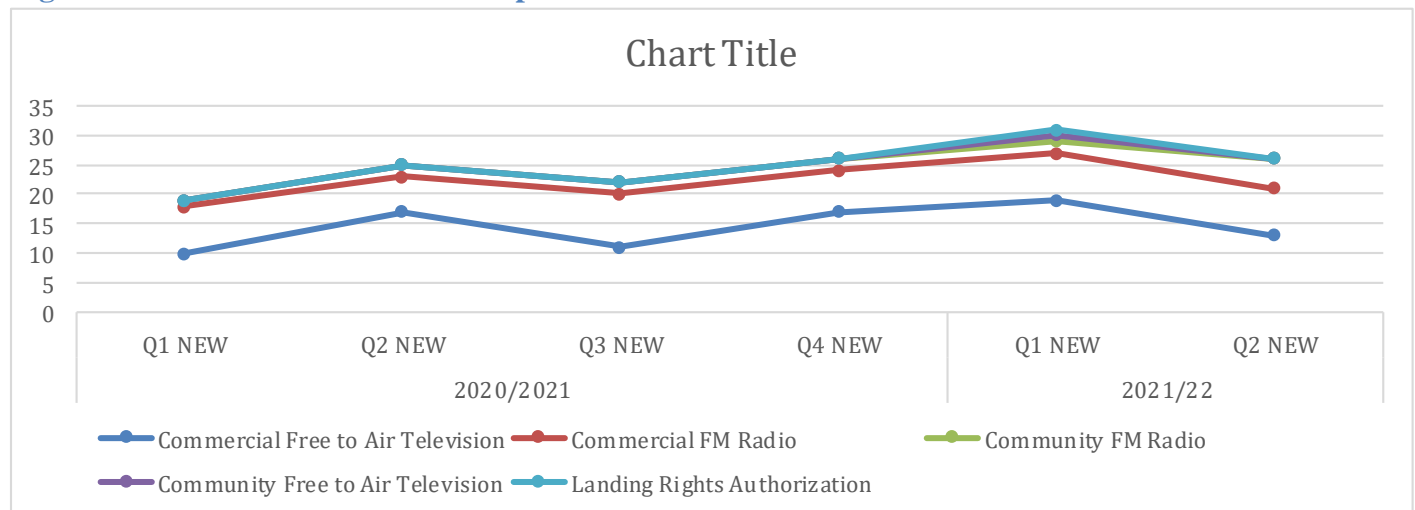
Table 1 below gives a breakdown of licences issued by the end of the second quarter of 2021-2022.

**Table 1: New Licenses issued in the period October to December 2021**

LICENSE TYPE	2020/2021				2021/22	
	Q1 NEW	Q2 NEW	Q3 NEW	Q4 NEW	Q1 NEW	Q2 NEW
Commercial Free to Air Television	10	17	11	17	19	13
Commercial FM Radio	8	6	9	7	8	8
Community FM Radio	1	2	2	2	2	5
Community Free to Air Television	0	0	0	0	1	0
Landing Rights Authorization	0	0	0	0	1	0
<b>Sub-Total</b>	<b>20</b>	<b>25</b>	<b>22</b>	<b>26</b>	<b>31</b>	<b>26</b>

During the quarter under review, 26 new broadcastings service providers were licensed, bringing the total licences issued within the half year to 57 as illustrated below: .

**Figure 2: New Licenses issued in the period October to December 2021**



The Table 2 below provides the details of the cumulative issued number of licensees in the broadcasting licence sector as at the end of the second quarter of the fiscal year:

**Table 2: Licensees Under Broadcast License Framework**

No.	Licence Category	Total Licenses issued as at the end of:		
		Q4(2020/21)	Q1 2021/22	Q2 2021/22
1.	Broadcast Signal Distributor	2	2	2
2.	Self-Provisioning Broadcast Signal Distributor	3	3	3
3.	Commercial Free to Air TV	229	248	261
4.	Community Free to Air TV	8	9	9
5.	Commercial FM radio	106	114	122
6.	Community FM Radio	21	23	28
7.	Subscription Broadcasting Service	17	17	17
8.	Subscription Management Service	4	4	4
9.	Landing Rights Authorization	4	5	5
	<b>Total</b>	<b>394</b>	<b>425</b>	<b>451</b>

There are a number of FTA TV licensed but are not yet operational. This is further to the grace period given within the licence conditions, for these licensees to commence the broadcast services upon being licensed. We also have a number of FM stations that are on air and whose applications are still undergoing the licensing process. This explains the difference between the stations licensed and those on air.

Table 3 below details the TV and FM Radio broadcasting that were on air in the various quarters.

**Table 3: Comparative Analysis of the Television and Radio stations on air by the end of Q2 202/22, Q1 2021/22 and Q4 of the FY 2020/21**

<b>FTA TV STATIONS</b>				
<b>Number of stations</b>		<b>Q4 2020/21</b>	<b>Q1 2021/22</b>	<b>Q2 2021/22</b>
Commercial FTA TV stations		130	130	142
Community FTA TV stations		4	3	3
Public FTA TV stations		3	3	3
<b>Total</b>		<b>137</b>	<b>136</b>	<b>148</b>
<b>FM STATIONS</b>				
<b>Number of stations</b>		<b>Q4 2020/21</b>	<b>Q1 2021/22</b>	<b>Q2 2021/22</b>
Commercial FM Radio stations		131	131	131
Community FM Radio stations		42	42	42
Public FM Radio stations		13	13	13
<b>Total</b>		<b>186</b>	<b>186</b>	<b>186</b>

Analysis of Table 2 and 3 reveals that there was no significant growth in all the Broadcasting license categories except for the Commercial Free to Air TV, over the previous fiscal year, to the first half of the current fiscal year. This reinforces the earlier projections that there's a likelihood that the broadcasting market is approaching the saturation level.

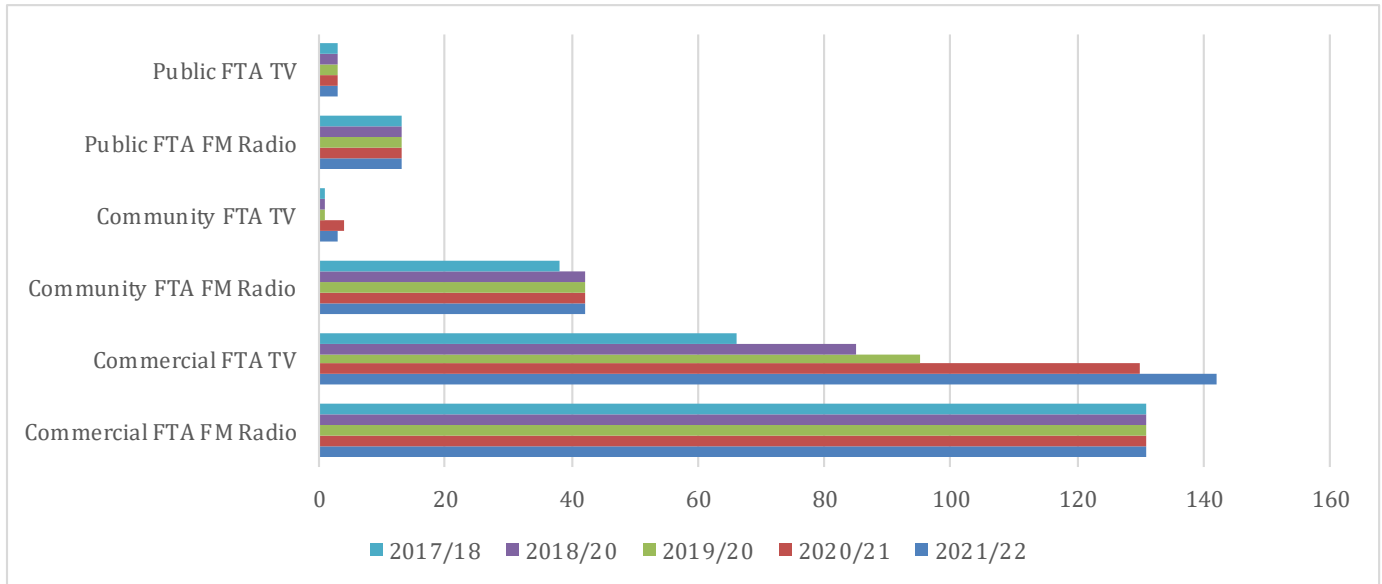
Table 4 presents a comparative trend of the number of broadcasters who were on air for each of the above categories from fiscal year 2017/2018 to Q2 2021/2022.



**Table 4: Comparison of on-air FTA broadcasting services from 2017/18 to Q2 2021/22.**

<b>Number of stations</b>	<b>2017/18</b>	<b>2018/19</b>	<b>2019/2020</b>	<b>2020/21</b>	<b>2021/22</b>
<b>FTA TV</b>					
Commercial FTA TV stations	66	85	95	130	142
Community FTA TV stations	1	1	2	4	3
Public FTA TV stations	3	3	3	3	3
<b>FM RADIO</b>					
Commercial FM Radio stations	131	131	131	131	131
Community FM Radio stations	38	42	42	42	42
Public FM Radio stations	13	13	13	13	13

Figure 2 below presents a comparative trend of the number of broadcasters on air for each of the above categories as at the end 2<sup>nd</sup> quarter of FY 2021/22.

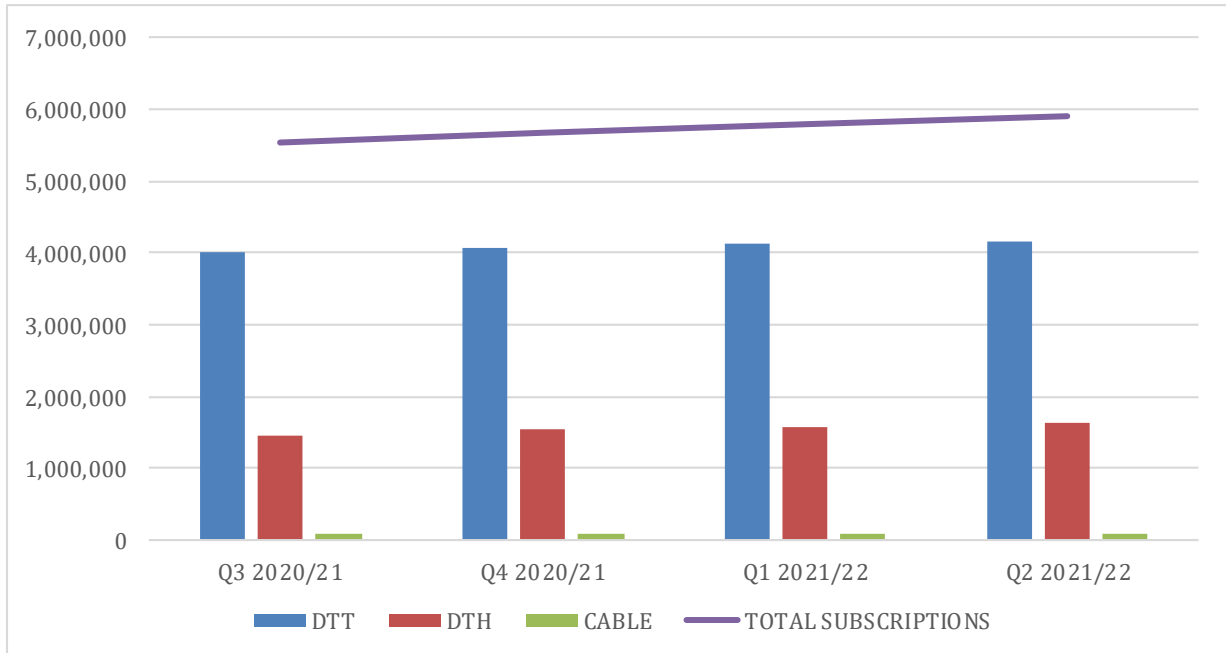


**Figure 2: Comparative graphic analysis of the Television and Radio stations on air by the end of Q2 2021/22, Q1 2021/22 and Q4 of the FY 2020/21**

## 2. Growth of Subscriptions to Broadcasting Services

During the last quarter, subscriptions to broadcasting services grew by 110,866 to a total of 5,899,763 subscribers from 5,788,897 at the end of the last quarter, representing a growth of 1.9%. The recorded growth follows adjustments for 4,951 subscriptions to Econet’s DTH services which exited the Kenyan market.

Figure 3 below illustrates the growth trend of the number of subscribers for broadcasting services for the four quarters to the end of Q2 of the FY 2020/21 while Figure 4 details the proportion of subscriptions to DTT, DTH, and Cable broadcasting services.



**Figure 3: Broadcasting Subscription from Q3 of 2020/21 to the end of Q2 of 2021/22**

Digital terrestrial television (DTT) broadcasting service remains the most common way of accessing television services with about 70.7% receiving TV broadcasting services through this means. DTT. This could be attributed to the affordability of services with the minimum bouquet costing just below KSh. 300 per month and the most expensive just below KShs. 2000. Television delivery through cable medium remained the least common with about 1.5% of subscriptions.. This could be attributed to the relative cost of setting up the infrastructure which has resulted in a small cable broadcasting services footprint in the country.

During the quarter, subscriptions to DTT, DTH and cable TV grew by 53,073, 55,911 and 1,882 respectively.

### 3. Digital Terrestrial TV Population coverage

In its current Strategic Plan cycle the Authority committed to increasing the percentage population covered by digital Terrestrial TV (DTT) broadcasting networks from 85% in 2018 to 90% by 2023. The Authority’s strategy was to achieve this goal by enforcing DTT network rollout obligations on common-carrier broadcasting signal distributors (BSDs) who are licensed to roll out DTT infrastructure. This target was achieved in the last fiscal year.

In the current fiscal, the Authority set a target of 92.0% DTT population coverage . Towards achievement of this target, the Authority carried out mapping in Kabarnet, Baringo County and Hola, Tana River County where Signet Signal Distributors Ltd commissioned a new 200W transmitter in Kabarnet and upgraded power to 500W in Hola. This resulted in the percentage DTT coverage increasing from 91.21% to 91.28%.

It's evident as indicated by the minimal percentage growth that the DTT population coverage growth is almost reaching its stagnation phase. The Authority may need to consider other mechanisms to supplement the efforts of the licensed signal distributors in an effort to ensure the entire population is covered. This may entail leveraging the Universal Service Fund (USF) to cover the remaining unserved areas to achieve the constitutional requirement for access to information by all in Kenya. In addition, the Authority may also consider focussing on the quality of the DTT signal (other than coverage) to ensure that the audience enjoys quality TV signal.

#### **4. Growth in terms of Broadcast Content Performance**

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

- Watershed period programming
- Local content including genre performance
- Local Children's programming
- Accessibility to broadcasting services by PWDs
- Religious programmes
- Occultism and superstition
- Advertisement
- Hate speech

Priority was given to five standards namely; local content, children's programming, access to broadcasting content by PWDs, accuracy & impartiality of Programming Content and respect of privacy in programming . which are enforced based on the complaints received. These five were chosen due to their associated public interest and high impact to the public. Other standards monitored include elections and electioneering period, crime and crisis situations. Meanwhile compliance for copyright of programmes is assessed when carrying out inspections.

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. A sample number of stations from each category is selected for monitoring, based on the number of stations that each category has.

During the second quarter, the Authority monitored a total of 54 FTA TV and 24 FM Radio stations.

In selecting the 54 FTA TV stations, the Authority maintained the 50 FTA TV stations monitored in the first quarter for statistical consistency, with exception of Airmobi TV which was off-air, and an additional four stations for rotational routine monitoring.

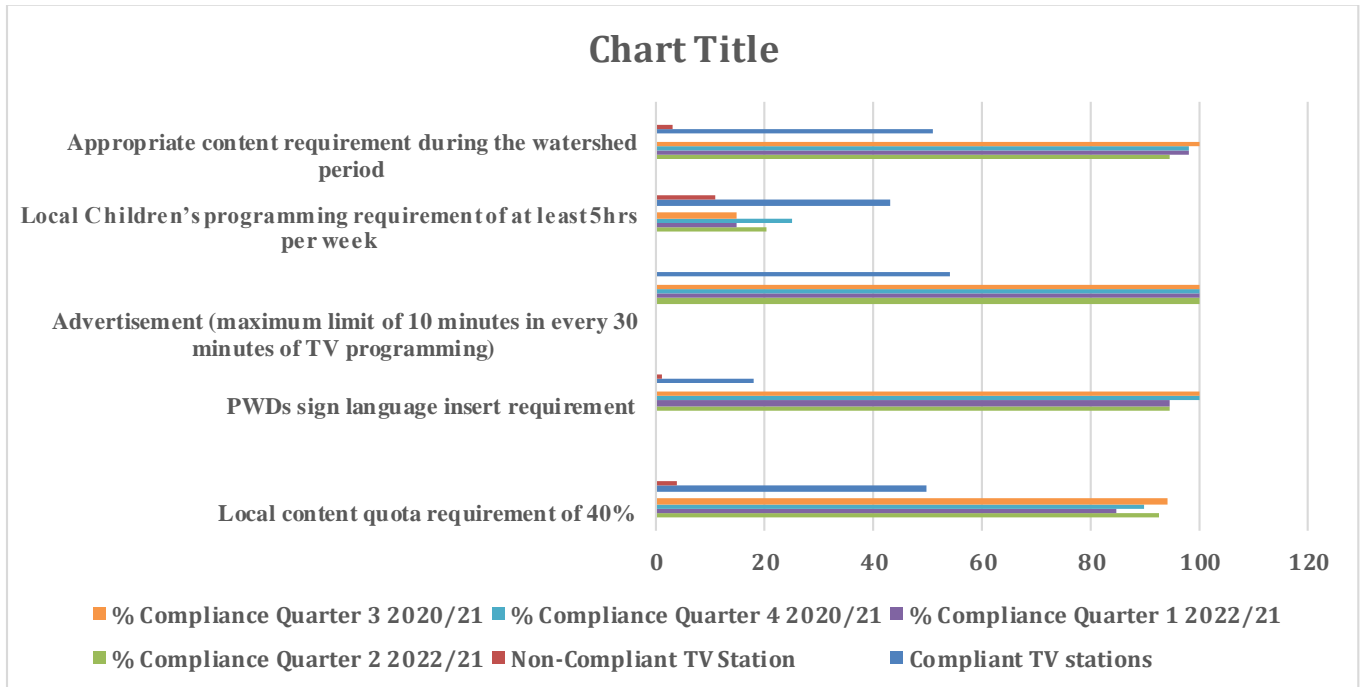
For FM stations, the Authority randomly selected 24 FM Radio stations. The radio stations monitored are Radio Maisha, Classic 105 FM, Capital FM, Spice FM, Milele FM, Kiss 100, Choice FM, Radio Citizen, Radio 316, Radio Jambo, Smooth FM, Radio Ramogi, NRG, Capital FM, Hot 96, Meru FM, KBC English Service, Kameme FM, Homeboyz Radio, Vybez FM, Jesus is Lord, Ghetto Radio, Iganjo FM, KBC Idhaa Ya Taifa and Trace FM.

#### **a. Performance of FTA TV stations**

The broadcast monitoring findings for the sampled FTA TV Stations in the second quarter, are summarized in Table 1 below:

**Table 5: Q2 FTA TV Broadcasting Monitoring Findings**

<b>Requirement</b>	<b>Compliant TV stations</b>	<b>Non-Compliant TV Station</b>	<b>% Compliance Quarter 2 2022/21</b>	<b>% Compliance Quarter 1 2022/21</b>	<b>% Compliance Quarter 4 2020/21</b>	<b>% Compliance Quarter 3 2020/21</b>
Local content quota requirement of 40%	50	4	92.6	84.6	90	94
PWDs sign language insert requirement	18	1	94.7	94.7	100	100
Advertisement (maximum limit of 10 minutes in every 30 minutes of TV programming)	54	0	100	100	100	100
Local Children's programming requirement of at least 5hrs per week	43	11	20.4	15	25	15
Appropriate content requirement during the watershed period	51	3	94.4	98	98	100



**Figure 4: Q2 FTA TV Broadcasting Monitoring Findings**

**i. Analysis of the Findings**

**1. Compliance to the Local Content Quota**

During the monitoring exercise in Quarter 2, 50 of the 54 TV stations monitored met the 40% threshold. This means that 92.6% of the stations monitored were compliant with the 40% quota requirement. The stations that did not comply with the 40% local content threshold were four (4), a decrease from the last quarter, which registered eight (8) stations. The non-compliant stations were KTN Home, TV 47, Akili, and Star Africa. The Authority has taken the necessary regulatory actions against the non-compliant stations to ensure compliance with this requirement.

During this period, the TV stations with the highest local content during the watershed period were Faith TV, Ukombozi and Capuchin TV registering 94.6%, 90.5% and 75.6% respectively. The stations with the lowest local content during the watershed period were Akili Kids, KTN Home and Star Africa registering 18.6%, 26.7% and 30.3% respectively.

On the other hand, during the first quarter 2020/21, the TV stations with the highest local content during the watershed period were Faith TV, Ukombozi and Capuchin TV registering 94.6%, 90.5% and 75.6% respectively. The stations with the lowest local content during the watershed period were KTN Home, GBS and End Time TV registering 29.1%, 28.1% and 28% respectively.

**Table 6: TV stations with the highest to lowest local content %age during the watershed period**

	Q2 2021/22		Q1 2021/22	
	Stations	Highest to lowest local content %age	Stations	Highest to lowest local content %age
1.	Kiss TV	97.7%	Faith TV	94.6%
2.	Faith TV	92.5%	Ukombozi	90.5%
3.	PPP TV	82.7%	Capuchin	75.6%
4.	Akili	18.6%	KTN Home	29.1%
5.	KTN Home	26.7%	GBS	28.1%
6.	Star Africa	30.3%	End Time TV	28%

**Table 7: The comparison of the Performance in terms of local content for the last four quarters**

Local Content Quota (%)	Number of broadcasters (3 <sup>rd</sup> Quarter 2020/2021)	Number of broadcasters (4 <sup>th</sup> Quarter 2020/2021)	Number of broadcasters (1 <sup>st</sup> Quarter 2021/2022)	Number of broadcasters (2 <sup>nd</sup> Quarter 2021/2022)
≥ 40	50	46	44	50
30 to < 40	3	4	5	2
20 to < 30	0	1	3	1
10 to < 20	1	1	0	1
<10	0	0	0	0



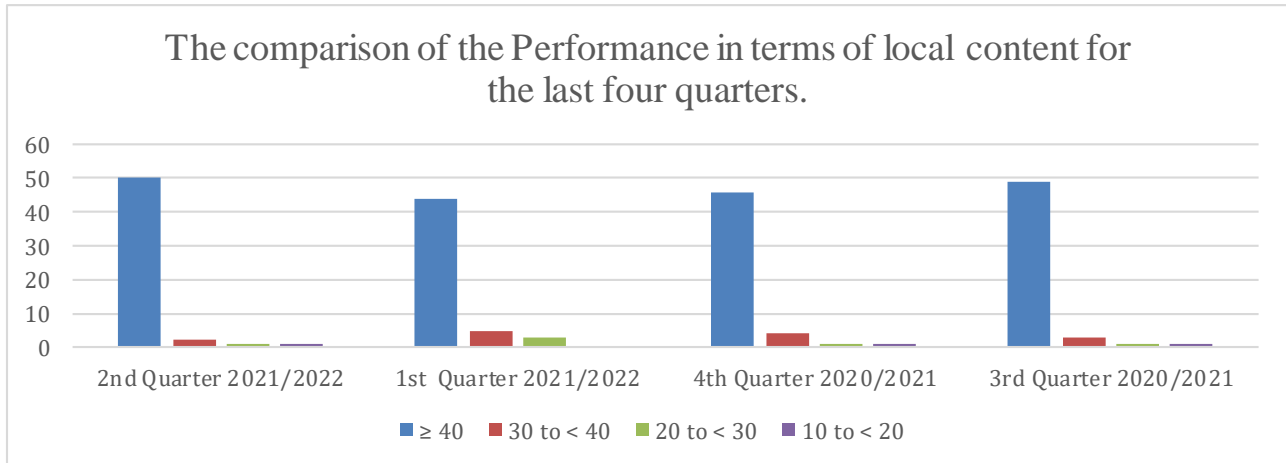


Figure 5: Local Content Performance

## 2. Performance of the Various Genres of Local Content During the Watershed Period

The performance of the various genre of local content is summarized in the table below:

Table 8: Performance of the various genres of local content

Genre	3 <sup>rd</sup> Quarter 2020/2021	4 <sup>th</sup> Quarter 2020/2021	1 <sup>st</sup> Quarter 2021/2022	2 <sup>nd</sup> Quarter 2021/2022
Music	27.01	21.9	31.8	31.4
Religious	32.83	40	36.5	36.8
Talk shows	10.82	9.1	8.9	6.9
Children	4.14	4.6	3.8	4
Reality	3.59	3.4	3.3	1.2
Drama	2.57	1.7	1.4	1.9
Comedy	0.25	0.2	0.2	0.7
Docs/Features	9.47	9.3	5.7	9.6
Sports	0.88	0.9	0.7	1
Current affairs	2.88	2.9	3.9	3.5
Magazine	5.58	6.1	3.3	3

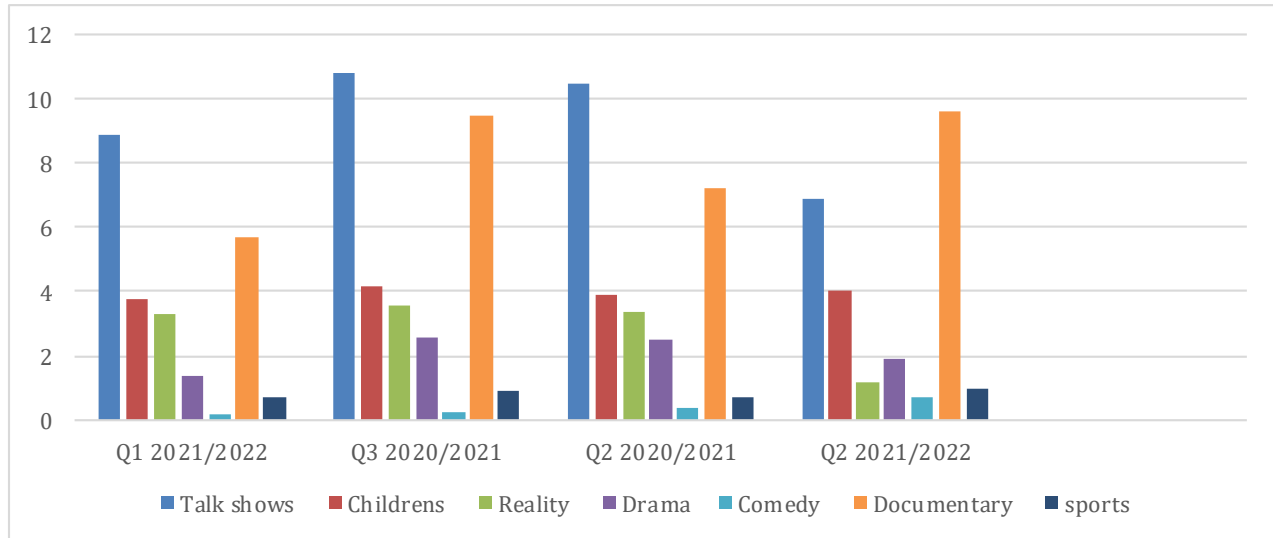


Figure 6: Performance of the various genres of local content

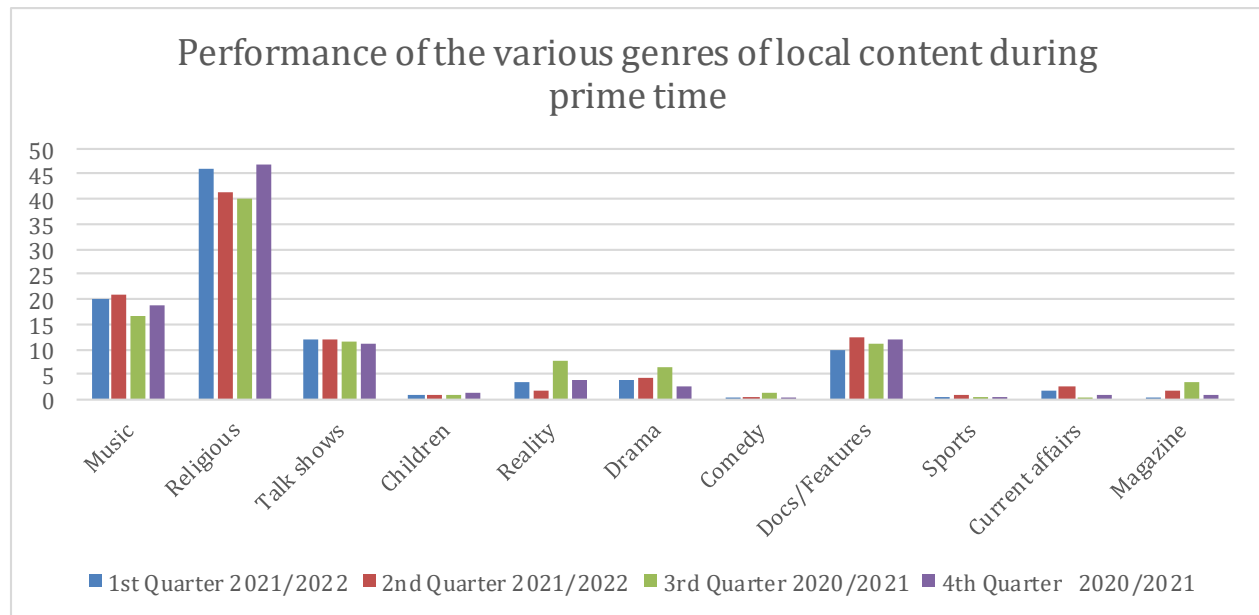
The results in this quarter show that religious content had the highest weekly average of 36.8% while music programming was rated second with a weekly average of 31.4%, features came in third at 9.6% and talk shows came at fourth at 6.9%. Comedy, sports and reality shows had the lowest local content across most of the stations monitored during the review period registering 0.7%, 1% and 1.2% respectively.

### 3. Performance of the Various Genres During Prime Time

The results in this quarter show that religious programmes had the highest weekly average of 41.4%, talk shows came in second at 20.8% and features came in third at 12.4%. Comedy, sports, and children had the lowest local content across most of the stations monitored during the period under review registering 0.6%, 0.9% and 1% respectively.

**Table 9: Performance of the various genres during prime time**

Genre	3 <sup>rd</sup> Quarter 2020/2021	4 <sup>th</sup> Quarter 2020/2021	1 <sup>st</sup> Quarter 2021/2022	2 <sup>nd</sup> Quarter 2021/2022
Music	16.78	19	20.3	20.8
Religious	40.11	47	46	41.4
Talk shows	11.57	11.3	11.8	12
Children	0.75	1.3	1	1
Reality	7.66	4	3.6	2
Drama	6.37	2.7	3.8	4.4
Comedy	1.29	0.4	0.2	0.6
Docs/Features	11.27	12	10	12.4
Sports	0.51	0.6	0.5	0.9
Current affairs	0.38	0.9	1.9	2.8
Magazine	3.34	0.8	0.3	1.7



**Figure 7: Performance of the various genres of local content during prime time**

#### 4. Advertisement Requirements

During the quarter under review, no TV station contravened this requirement.

## 5. Accessibility to Broadcasting Services by Persons with Disabilities (PWDs)

On accessibility to broadcasting services by PWDs, of the 19 TV stations that air news and programs of national importance, one (1) station (Kyen TV) was found to be non-compliant with this requirement.

## 6. Religious Programming Guidelines

During the period under review, no station was found to be in contravention with this requirement.

## 7. Requirement for Appropriate Content During Watershed Period

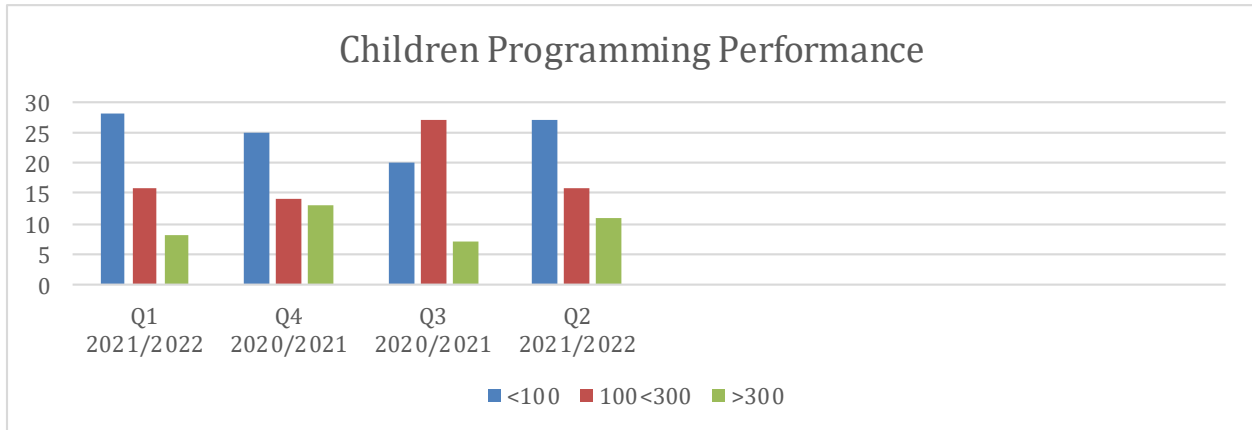
During the period under review, three of the TV stations, namely; Sasa TV, Citizen TV and Kameme TV monitored were found to be in contravention with this requirement.

## 8. Children Programming Performance

The TV stations that were compliant with the five (5) hours of children's programming this quarter were eleven (11) namely NTV, Ebru TV, Family TV, GBS TV, KUTV, K24, Deliverance TV, Edu TV, TV 47, Noor Al Huddah and. Akili TV. This is an increase from the previous quarter, which registered eight (8) stations that complied with the requirement.

**Table 10: Children's Programming Performance**

<b>Duration of Children Programming (Minutes)</b>	<b>Number of broadcaster (3<sup>rd</sup> Quarter 2020/2021)</b>	<b>Number of broadcasters (4<sup>th</sup> Quarter 2020/2021)</b>	<b>Number of broadcasters (1<sup>st</sup> Quarter 2021/2022)</b>	<b>Number of broadcaster (2<sup>nd</sup> Quarter 2021/2022)</b>
<100	20	25	28	27
≥100 and <300	27	14	16	16
≥300	7	13	8	11



**Figure 8: Children programming performance**

**b. Performance of FM Radio Stations**

During the period under review, 24 radio stations were monitored. Of the 24 stations, no station aired inappropriate content during the watershed period and appropriate regulatory actions were taken against them.

**IV.Regulatory Actions**

During the quarter, the Authority initiated the process of revoking assigned frequencies and cancellation of license offers to broadcasters who had either failed to apply for licences, failed to comply with licensing requirements or meet the licence offer requirements. It is expected that the Authority shall take the necessary regulatory actions against broadcasters who fail to take corrective measures within the 30-day window period which lapses in the early part of the next quarter. This measure is aimed at enhancing compliance by broadcasters.

The Authority continued implementing regulatory actions against broadcasters who were found to be in violation of various requirements.