



COMMUNICATIONS  
AUTHORITY OF KENYA

# BROADCASTING SERVICES REPORT

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**Q2 2022/2023**

[www.ca.go.ke](http://www.ca.go.ke)



[info@ca.go.ke](mailto:info@ca.go.ke)



## Executive Summary

During the period under review, a total of 21 licenses were issued to broadcasting service providers for radio and television broadcasting services, bringing the total number of licensed broadcasting service providers to 590. The total number of broadcasting stations that were operational increased from 89 Television (TV) and 186 FM radio in the year 2018/2019 to 199 TV and 228 FM radio as at 31st December 2022.

The subscriptions to broadcasting services grew by 110,640 (1.8%) to a total of 6,191,110 subscriptions. Despite the overall growth, subscriptions to cable broadcasting service continued to decline apparently due to competitive pressure from other platforms. The subscriptions to Digital Terrestrial Television (DTT) and Direct To Home (DTH) grew by 47,788 (1.1%) and 65,798 (3.9%) respectively, and declined by 2,946 (4.9%) for cable broadcasting services. There was no growth in DTT population coverage during the quarter, and it remained at 92%.

The broadcast content standards are set out in the programming code, and have been broadly characterized as programming guidelines for watershed period, children protection, advertisements, local content, and accessibility for persons with disabilities.

The compliance levels for TV broadcasting on local content quota requirement increased from 94.6% to 98.2%. Compliance with programming guidelines for the watershed period, children protection, and religious guidelines stood at 96.4%, while that of accessibility to broadcasting services by persons with disabilities (PWDs) was at 83.3%.

With respect to radio broadcasting, 95% of monitored stations complied with programming guidelines for the watershed period. All the monitored stations were compliant with the advertisement and broadcast competition standards.

## 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, 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 2022/23.

## Strategic Implications

In its Strategic Plan 2018-23, the Authority, under Key Result Area (KRA) I 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. The Strategic Plan also includes the objective of ensuring compliance with regulatory requirements.



# Broadcasting Market

The Authority issued 21 licences compared to 29 licences that were issued in the last quarter. Figure 1 provides the trend in the number of licences issued in various categories.

From Figure 1, licences issued were only for commercial FM radio, community FM radio and commercial FTA TV broadcasting services. The cumulative number of licences issued under the broadcasting sub-sector up to the end of the second quarter of the financial year 2022/23 was 590.

Figure 2 shows the growth on the number of broadcasting stations that were operational from 89 TV and 186 FM radio in the year 2018/2019, to 199 TV and 228 FM radio during the period under review.

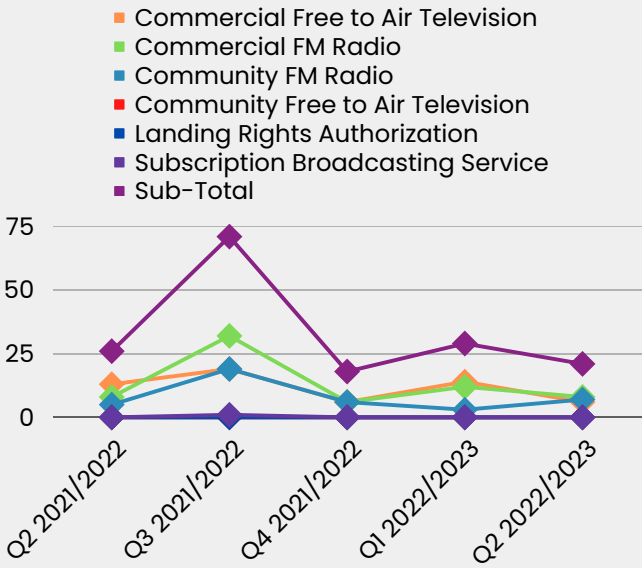
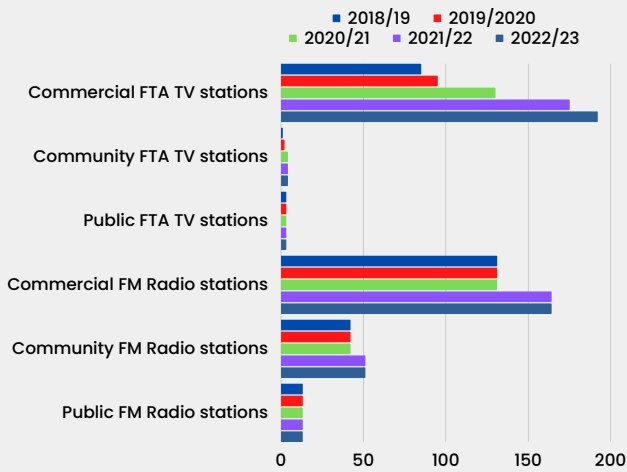


Figure 1: Trend on the number of licenses issued

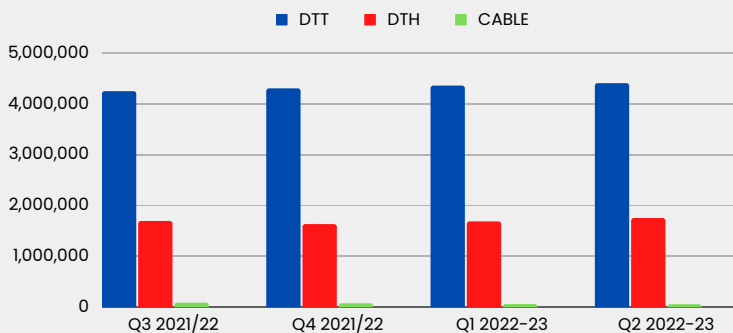




**Figure 2: Growth on the number of FM and TV broadcasting stations**

### Subscription Broadcasting Services

During the period under review, subscriptions to broadcasting services grew by 110,640 (about 1.8% over the quarter) from 6,080,470 to 6,191,110 as of 31st December 2022. Figure 3 illustrates the trend in subscriptions for broadcasting services.



**Figure 3: Trend in subscription broadcasting services**

During the quarter, there was no change in DTT population coverage, and it remained at 92%.

DTT remained the most popular platform to access subscription broadcasting services accounting for 71.52 % of the total number of subscriptions to broadcasting services as of 31st December 2022. This could be due to the relative affordability of monthly subscription fees compared to cable and DTH. Access through cable medium accounted for 1.3% of subscriptions, which could be due to the lower footprint compared to competing media.

During the quarter, subscriptions to DTT grew by 47,788 (or about 1.1% growth over the period) compared to the growth of 54,633 growth reported during the previous quarter. Subscriptions to DTH services also grew by 65,798 (3.9%) surpassing the growth of 52,883 in the last quarter. This growth is attributed to the FIFA World Cup 2022 which took place in Qatar during the quarter.

The subscription to cable broadcasting services however declined by 2,946 (4.9%). The decline in subscriptions to cable services could be attributed to a three-pronged competition pressure from DTT which offers lower prices, DTH whose services host compelling sports content, as well as the shift to online services.

# Broadcast Content Performance

During the period under review, the Authority monitored fifty-six (56) TV and twenty (20) radio broadcasting stations for compliance with the set programming standards. The TV broadcasters' compliance with the set broadcasting standards is summarized in Figure 4.

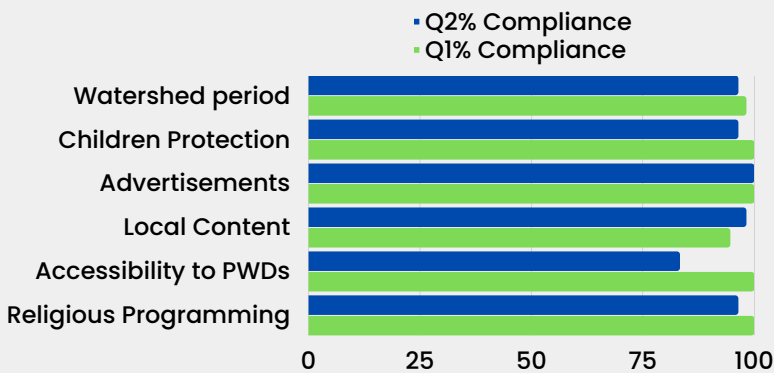


Figure 4: Overview of TV Broadcast content performance

The compliance levels with minimum local content quota requirement increased from 94.6% to 98.2 %. Compliance with the programming guidelines for the watershed period, children protection, and religious programming stood at 96.4%. On accessibility for persons with disabilities, it reduced from 100% to 83.3%. The reduction in performance is attributed to new broadcasters that are still in the process of setting up mechanisms to ensure compliance.

With respect to the radio stations, 95% of the radio stations that were monitored complied with programming guidelines for the watershed period. All the monitored stations were compliant with the advertisement and broadcast competition standards.





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## Contact Us

+254-020-4242000

[www.ca.go.ke](http://www.ca.go.ke)

[info@ca.go.ke](mailto:info@ca.go.ke)

CA Centre Waiyaki Way

P.O. Box 1444-0800

