



BROADCASTING SERVICES REPORT

THIRD QUARTER FINANCIAL YEAR 2022/2023

(1ST JANUARY – 31ST MARCH 2023)

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Disclaimer:

Although every effort has been made to ensure the accuracy of the data contained in this report, the Authority is not liable for inaccuracies in any of the information contained in this report, which is contingent upon the service providers' compliance returns

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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 616.

The total number of broadcasting stations that were operational increased from 89 Television (TV) and 186 FM radio in the year 2018/2019 to 195 TV and 228 FM radio as at 31st March 2023.

The subscriptions to broadcasting services grew by 0.05% (32,464) to a total of 6,223,574 subscriptions. The subscriptions on DTT, Direct to Home (DTH), and Cable grew by 0.27% (11,858), 0.84% (14,822), and 8.87% (5,784) to result in a total of 4,392,349, 1,761,001, and 65,224 respectively. There was no growth in DTT population coverage, and it remained at 92%.

The broadcast content standards which are set out in the Programming Code provide 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 decreased from 98.2% to 91.4% while compliance with programming guidelines for the watershed period, children protection decreased from 96.4% to 91.4%. The compliance with religious guidelines stood at 94.3%, while that of accessibility to broadcasting services by PwDs was 100%.

With respect to radio broadcasting, the monitored radio stations complied with programming guidelines for the watershed period and with the advertisement and broadcast competition standards

I. INTRODUCTION

As the ICT industry regulator, the Communications Authority of Kenya (CA) is mandated 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 third quarter of financial year 2022/23.

II. STRATEGIC IMPLICATIONS

The Authority in its Strategic Plan 2018-23, has 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.

III. THE BROADCASTING MARKET

a) Licences issued during the period under review

The Authority issued 26 licenses compared to 21 licences issued in the last quarter as shown in figure 1 below..

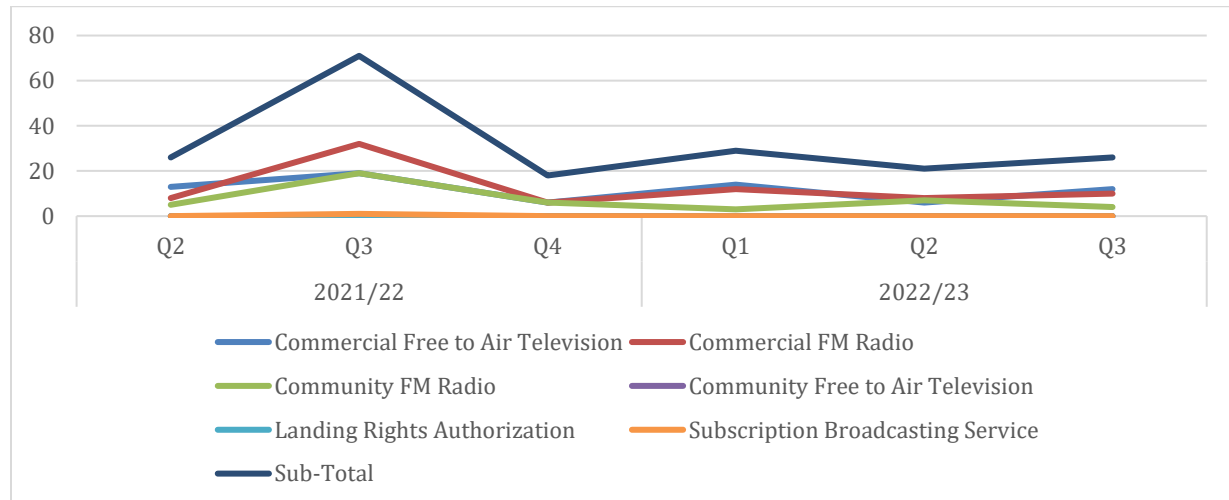


Figure 1: Trend on the number of licenses issued

From Figure 1, licences issued were only for commercial FM radio, community FM radio and commercial FTA TV broadcasting services. The cumulative number of licenses issued in the broadcasting sub-sector up as at the end of the third quarter of the financial year 2022/23 was 616.

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 195 TV and 228 FM radio during the period under review.

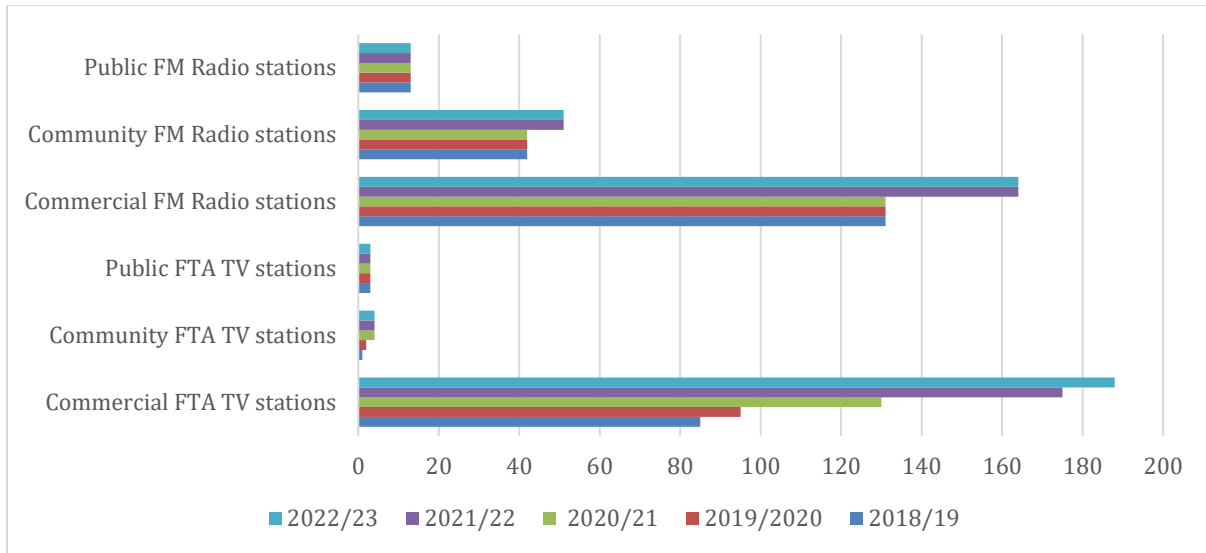


Figure 2: Growth on the number of FM and TV broadcasting stations

b) Subscription to the Broadcasting Services

During the quarter, subscriptions to broadcasting services grew by 0.05% (32,464) to a total of 6,223,574 subscriptions. The subscriptions on DTT, Direct to Home (DTH), and Cable grew by 0.27% (11,858), 0.84% (14,822), and 8.87% (5,784) to result in a total of 4,392,349, 1,761,001, and 65,224 respectively.

Figure 3 illustrates the trend in subscriptions for broadcasting services for the five quarters to the end of Q3 of FY 2022/23.

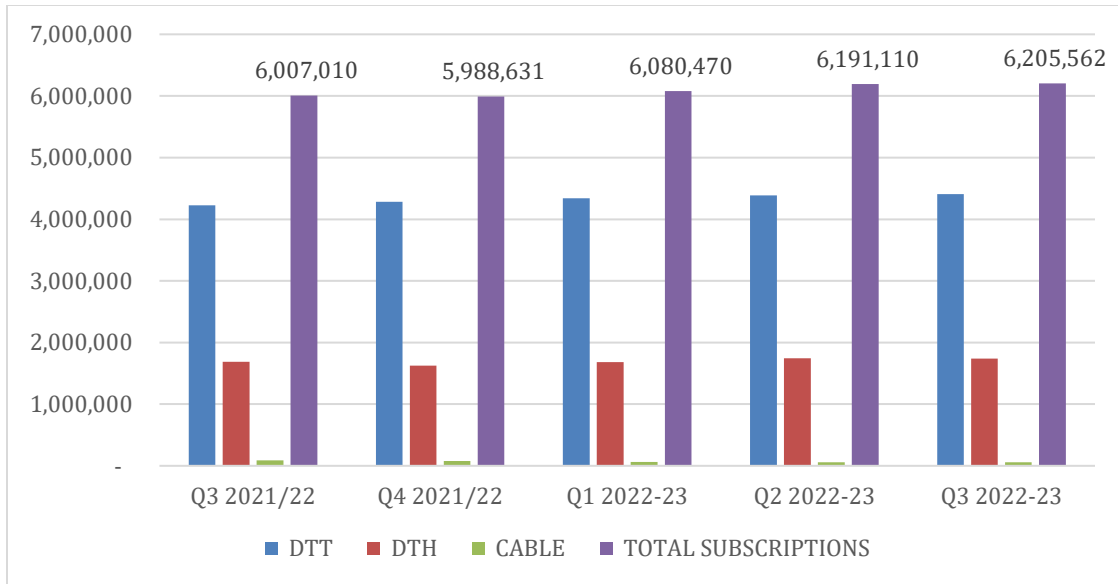


Figure 3: Trend in subscriptions for broadcasting services

Digital Terrestrial Television (DTT) remained the most popular platform for accessing subscription broadcasting services accounting for 70.6 % of the total number of subscriptions as of 31st March 2023. This could be due to the relative affordability of monthly subscription fees compared to cable and Direct to Home (DTH) thus resulting in mass access at the lower market segments.

Access to television through cable medium remained the least popular with only 1% of subscriptions, largely attributed to the low cable footprint due to the high cost of setting up the infrastructure compared to other forms of media.

c) Digital Terrestrial TV (DTT) Population coverage

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

IV. BROADCAST CONTENT STANDARDS PERFORMANCE

During the period under review, the Authority monitored 35 TV and 15 FM radio broadcasting 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, local content, children protection, advertisements, religious guidelines, and accessibility for persons with disabilities. The TV broadcasters' compliance with the set broadcasting standards is summarized in Figure 4 below.

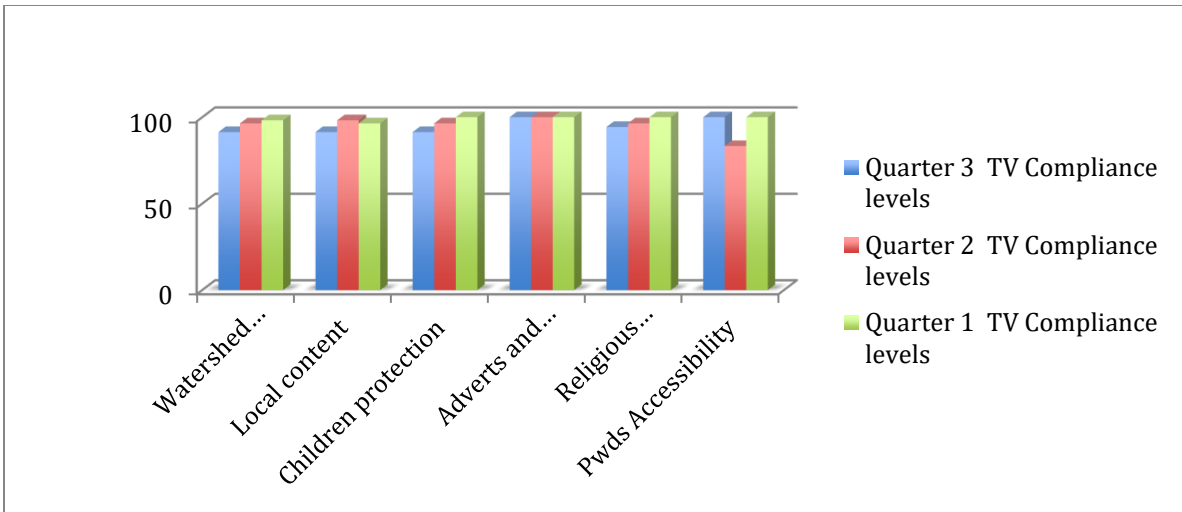


Figure 4: Overview of TV Broadcast content performance

The compliance levels with minimum local content quota decreased from 98.2% to 91.4 % while compliance with the programming guidelines for the watershed period, children protection decreased from 96.4 to 91.4%.

At the same time, compliance with religious programming guidelines stood at 94.3%, while that of accessibility to broadcasting services by PWDs was at 100%.

With respect to the radio stations, all the monitored radio stations complied with programming guidelines for the watershed period and the advertisement and broadcast competition standards.