



**QUARTERLY SECTOR STATISTICS REPORT
SECOND QUARTER FOR THE FINANCIAL YEAR 2015/2016
(OCTOBER-DECEMBER 2015)**

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Although every effort has been made to ensure 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 operators/service providers' compliance returns.

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LIST OF ABBREVIATIONS

ICTs	Information Communication Technologies
EASSy	Eastern Africa Submarine Cable Systems
LION2	Lower Indian Ocean Network
GSM	Global Systems for Mobile Communications
Mbps	Megabits per second
MMS	Multimedia Service
MoU	Minutes of Use
MVNO	Mobile Virtual Network Operator
SEACOM	Sea Sub-Marine Communications Limited
SIM	Subscriber Identification Module
SMS	Short Messaging Service
TEAMS	The East African Marine System
VSAT	Very Small Aperture Terminal
FY	Financial Year
OTT	Over-The-Top
TV	Television
BSD	Broadcast Signal Distributors
PANG	Pan Africa Network Group
DTT	Digital Terrestrial Television
FTA	Free to Air
STB	Set Top Boxes
FM	Frequency Modulation

I. PRELIMINARY NOTES

- *This report is based on data provided by service providers as per their license conditions.*
- *The information provided in this report is subject to alteration in case of any revisions or updates from the service providers.*

II. REPORT SUMMARY

The ICT Sector Quarterly Statistics Report for the Second Quarter of the Financial Year 2015/16 provides an overview of the ICT sector performance and development trends in the following service categories:

- *Mobile Telephony Service*
- *Fixed Telephony Service*
- *Internet/Data Service*
- *Registered Domains*
- *Broadcasting*
- *Postal and Courier Service and;*
- *Tariffs, Promotions and Special Offers*

The mobile telephony sub-sector experienced a marginal drop in the number of mobile subscriptions during the quarter under review to post 37.7 million subscriptions down from 37.8 million recorded last quarter. The decline could be attributed to SIMbox raids which were carried out by the Authority during the quarter under review. . Consequently, mobile penetration dropped by 0.4 percentage points to stand at 87.7 percent down from 88.1 percent recorded during the previous quarter.

Pre-paid mobile subscriptions were recorded at 36.7 million down from 36.8 million subscriptions recorded during the previous quarter whereas Post-paid subscriptions were recorded at 1.0 million up from 989,889 subscriptions registered last quarter.

The volume of local mobile traffic declined by 5.6 per cent to post 10.2 billion minutes down from 10.8 billion minutes posted during the previous quarter. This decrease in traffic is attributed to the reduction in mobile subscriptions recorded during the period under review. On net traffic recorded 8.9 million minutes during the quarter down from 9.6 million minutes recorded in the previous quarter, representing a decline of 6.9 per cent. Similarly, each subscriber talked for an average of 88.9 minutes per month during the quarter down from 95.8 minutes recorded during the previous quarter.

The volume of local SMS sent during the quarter stood at 8.1 billion up from 7.0 billion recorded during the previous quarter representing growth of 15.3 per cent during the quarter. Each subscriber sent an average of 71.8 messages per month up from 61 messages recorded in the last quarter. The increase is attributed to the festive season where friends, families and loved ones exchanged well wishes and seasonal greetings.

During the quarter under review, the number of mobile money transfer subscriptions dropped by 3.6 per cent to register 26.7 million subscriptions down from 27.7 million subscriptions registered during the previous period. On the other hand, the number of mobile money agents grew from 135,724 agents recorded last quarter to 141,542 agents during the quarter under review.

The uptake of mobile number portability service maintained a downward trend during the quarter under review to post 234 in-ports down from 461 in-ports posted during the foregoing quarter. This decline marked a significant drop of 49.2 per cent which is attributed to the increasing number of twin SIM mobile handsets that enable use of more than one SIM card on one handset. Users are able to enjoy special offers and promotions from different service providers with the twin SIM handsets.

The fixed network service in the country has continued to dwindle especially after the decommissioning of fixed wireless network by Telkom Kenya Limited last year. During the period under review, the number of fixed line subscriptions dropped by 2.6 per cent to stand at 85,496 lines down from 87,774 lines posted during the previous period.

The Internet/data market in the country has grown significantly over the years following the roll out of the National Optic Fibre Broadband Infrastructure (NOFBI) Phase 1, the ongoing roll out of Phase 2 and the increased last mile connection by private operators. The expansive roll out of Third Generation (3G) mobile communication network is also a major contributor to the increased accessibility, availability and use of internet/data services. During the period October to December 2015, the number of internet/data subscriptions grew by 10.6 per cent to register 23.9 million subscriptions up from 21.6 million subscriptions registered during the previous period. Subsequently, the number of estimated internet/data users stood at 35.5 million up from 31.9 million users recorded during the last quarter. This translated to an internet/data penetration level of 82.6 per cent up from 74.2 per cent recorded during the previous quarter.

Mobile data posted 23.7 million subscriptions representing an increase of 10.2 per cent from 21.5 million subscriptions recorded last quarter. The growth in mobile data/internet is attributed to the increased affordability of Internet bundles offered by the various internet/data providers as result of increased fair competition in the data/internet market. Growth of e-commerce services and social networking sites is also a factor leading to increased internet/data usage. The use of utility services such as online mobile banking, online research on mobile devices by most Kenyans has also fuelled the uptake of internet/data services.

During the period under review, the number of broadband subscriptions increased substantially by 13.9 per cent to reach 7.2 million subscriptions up from 6.3 million subscriptions registered in the previous quarter. Subsequently, the level of broadband penetration stood at 16.8 per cent during the quarter under review with mobile broadband contributing 87.6 per cent.

International bandwidth available in the country recorded a marginal growth of 0.1 per cent to stand at 1.55 million Mbps up from 1.54 million Mbps recorded during the last quarter.

Bandwidth utilisation represented 55.1 per cent of the total capacity up from 51.1 per cent recorded during the previous quarter.

The number of domain names as registered by KENIC grew significantly by 11.1 per cent by the end of the period under review to stand at 51,548 up from 46,411 recorded in the previous quarter.

The number of free to Air TV stations on digital terrestrial platform grew slightly from 55 to stand at 62 stations at the end of the quarter under review. On the other hand, the total number of Radio FM stations grew from 137 recorded in the last quarter to 139 during the quarter under review.

In the postal and courier sub-sector, the number of letters sent locally experienced a substantial growth of 35.6 per cent to reach 17.6 million during the quarter up from 12.9 million letters sent during the preceding quarter. Courier items sent too increased remarkably by 46.1 per cent to stand at 445,836 during the quarter up from 305,248 items sent during the previous quarter. The remarkable growth in traffic for local letters and courier items sent is attributed to the festive season which is usually marked by intense exchange of greeting cards and gifts between relatives and friends. K.C.P.E and K.C.S.E exams were also undertaken during the same period and therefore posting of success cards by relatives and friends contributed to the growth in traffic for letters and courier items sent locally.

Letters received from other countries were recorded at 2.2 million down from 2.4 million letters received during the last quarter, marking a drop of 6.5 per cent. On the contrary, letters sent to other countries increased tremendously by 93.5 per cent to stand at 2.66 million letters up from 1.37 million letters sent during the last quarter. This is attributed to the busy festive season during which relatives and friends from all over the world exchanged seasonal greetings cards.

The number of tariffs and promotions filed for data services remained highest as a result of continued roll-out of internet services by operators; increased uptake of data/internet services by consumers; proliferation of smart devices; and the availability of low-cost data/internet devices in the market.

1 CELLULAR MOBILE SERVICES

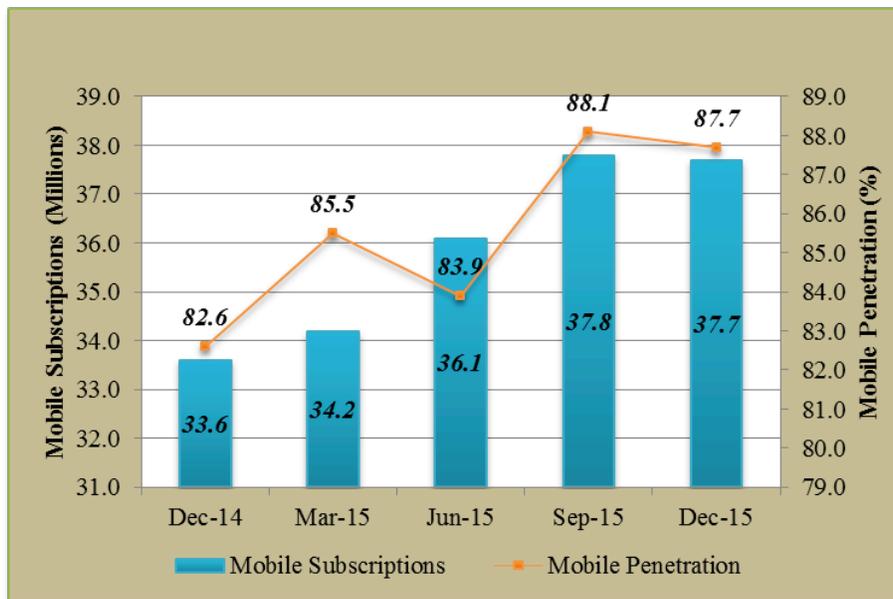
1.1 Mobile Subscriptions

During the quarter under review, the number of mobile subscriptions dropped from 37.8 million recorded last quarter to 37.7 million. The decline could be attributed to SIMbox¹ raids, which were carried out by the Authority during the period under review. Fraudsters were using SIMboxes to tap communication away from the official routing networks. However, there was a growth of 2.6 per cent when compared to the same period of the previous year.

Mobile penetration also declined by 0.1 percentage points to stand at 88 per cent during the quarter under review down from 88.1 per cent recorded during the previous quarter.

The trends in mobile subscriptions and mobile penetration levels are illustrated in Figure 1 below.

Figure 1: Mobile Subscriptions

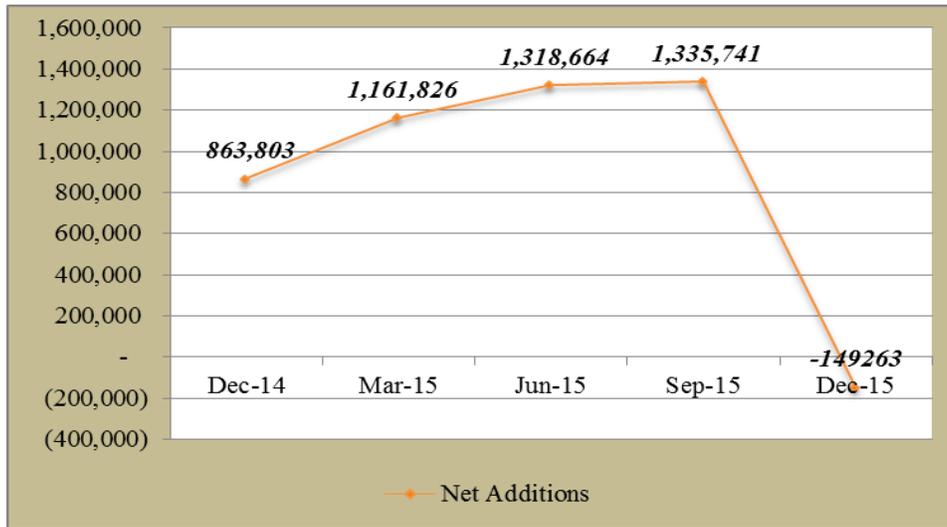


*Source: CA, Operators' Returns, *Population figure used to compute penetration is 43.0 million as per the Economic Survey of 2015.*

As demonstrated in Figure 2, the net additions in mobile subscriptions registered a decline of 149, 263 subscriptions during the quarter compared to an increase of 1.3 million net additions recorded during the previous quarter.

¹ A SIMbox is an equipment used by fraudsters to tap communication away from the official routing networks for financial gain. It normally uses Internet to convert telephony into VOIP to facilitate the financial transaction.

Figure 2 : Net additions in Mobile Subscriptions

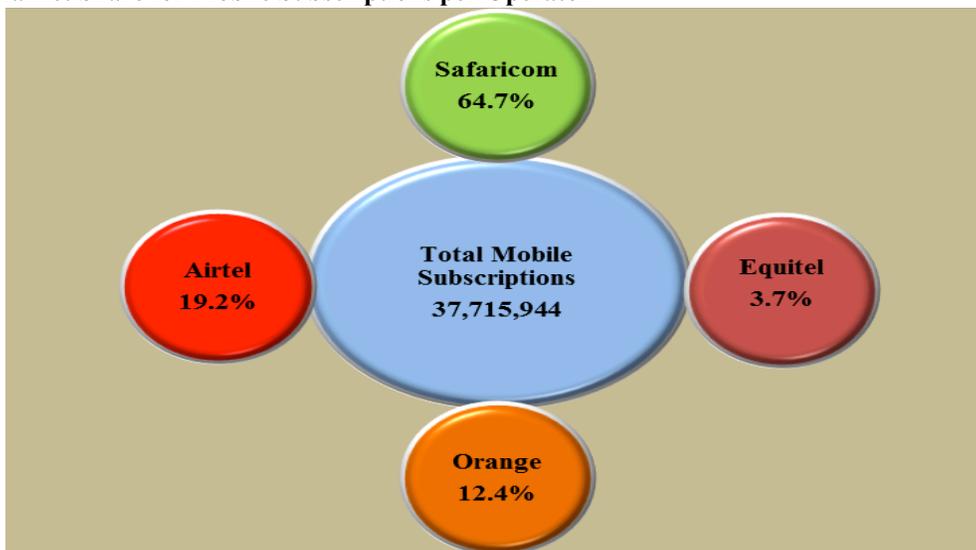


Source: CA, Operators' Returns

During the period under review, Safaricom Limited lost its mobile subscriptions market share by 1.6 percentage points to post a market share of 64.7 per cent down from 66.3 per cent market share posted last quarter. The market share for mobile subscriptions experienced a slight change during the quarter following reduction of Safaricom Limited Kenya subscription.

Airtel Networks Limited gained 0.1 percentage point market share to record 19.2 per cent up from 19.1 per cent market share reported in the previous quarter. Orange gained 0.8 per centage points to reach 12.4 per cent market share from last quarter's performance of 11.8 per cent. Likewise, Finserve Africa Limited (Equitel) acquired a market share of 0.8 per cent during the quarter to attain 3.7 per cent market share. Market share for mobile subscriptions per operator are as shown in Figure 3.

Figure 3: Market Share for Mobile Subscriptions per Operator



Source: CA, Operators' Returns.

The number of post-paid and pre-paid subscriptions for each of the four operators changed marginally during the quarter under review. Safaricom lost 3.8 per cent of its prepaid subscriptions but gained 2.2 per cent in post-paid subscriptions. Safaricom’s total number of mobile subscriptions declined by 2.7 per cent to stand at 24.4 million during the quarter under review down from 25.0 million posted last quarter. Airtel Network Limited gained in both pre-paid and post-paid subscriptions to post a total of 7.2 million subscriptions that marked an increase of 0.3 per cent when compared to the previous period.

The total number of mobile subscriptions for Orange Limited increased by 4.3 per cent when compared to subscriptions recorded during the previous quarter of 4.4 million to stand at 4.6 million subscriptions during the quarter under review. Equitel on the other hand experienced a significant increase of 29.6 per cent in mobile subscriptions to record 1.4 million subscriptions during the quarter.

The number of pre-paid and post-paid subscriptions by operator is as indicated in Table 1.

Table 1 : Mobile Subscription per operator

Name of operator	Dec-15			Sep-15			Quarterly variation (%)
	Pre-paid	Post-paid	Total	Pre-paid	Post-paid	Total	
Safaricom Limited	23,556,656	852,278	24,408,934	24,261,908	833,818	25,095,726	-2.7
Airtel Networks Limited Subscriptions	7,088,360	148,164	7,236,524	7,067,283	146,873	7,214,156	0.3
Finserve Africa (Equitel)	1,407,172	-	1,407,172	1,085,869	-	1,085,869	29.6
Telkom Kenya(Orange)	4,654,190	9,124	4,663,314	4,460,258	9,198	4,469,456	4.3
Total	36,706,378	1,009,566	37,715,944	36,875,318	989,889	37,865,207	-0.4

Source: CA, Operators’ Returns.

1.2 Mobile Money Transfer

During the quarter under review, the number of mobile money transfer subscriptions was recorded at 26.7 million subscriptions whereas the number of active mobile money transfer agents stood at 141,542 at the end of the quarter. The volume of transactions (deposits and withdrawals) on this platform was registered at 333.2 million with 813.7 billion Kenya Shillings transferred among users during the period. Mobile commerce recorded a total of 138.6 million transactions with 275.8 billion Kenya Shillings was used to pay for goods and services. The person-to-person transfers stood at 393.3 billion Kenya Shillings as at the end of the quarter under review.

The trends in mobile money transfer services are as shown in Table 2.

Table 2 : Mobile Money Transfer Service

Service Provider	Dec-15						
	Agents	Subscriptions	Number of transactions	Value of transactions (Ksh)	Number of mobile commerce	Value of Number of mobile commerce (Ksh)	Person to Person(P2P) transfers (Ksh)
Safaricom (M-Pesa)	96,155	19,187,799	277,131,992	754,806,403,141	92,498,972	253,623,496,466	356,649,950,651
Airtel (Airtel Money)	10,534	3,694,360	7,069,749	12,153,294,869	6,956,362	12,014,605,942	0
Orange (Orange Money)	16,734	192,339	37,000	196,890,000	3,580	51,670,872	6,931,398
Finserve (Equitel Money)	-	1,407,172	42,726,977	45,397,543,505	39,117,947	10,082,515,849	35,315,027,656
Mobikash	16,523	1,767,905	6,317,860	1,183,343,054	26,910	47,868,046	1,372,282,418
Tangaza*	1,596	503,556	0	0	0	0	0
Total	141,542	26,753,131	333,283,578	813,737,474,569	138,603,771	275,820,157,175	393,344,192,123

Source: CA, Operators' Returns, *Provisional data.

1.3 Mobile Number Portability

As indicated in Table 3, the number of in-ports declined by 49.2 per cent during the quarter under review to stand at 234 down from 461 in-ports recorded during the last quarter.

Table 3 : Mobile Number Portability

Period	Oct-Dec 15	Jul-Sep 15	Quarterly Variation (%)	Oct-Dec 14	Jul-Sep 14	Quarterly Variation (%)
Number of in-ports	234	461	-49.2	781	943	-17.2

Source: CA, Operators' Returns.

1.4 Mobile Traffic and Usage Pattern

1.4.1 Voice Traffic

During the period under review, the volume in local mobile traffic dropped by 5.6 per cent to post 10.2 billion minutes down from 10.8 billion minutes posted in the previous quarter.

On-net traffic declined by 6.9 per cent during the quarter to reach 8.9 billion minutes down from 9.6 billion minutes posted during the previous quarter. On the other hand, Off-net traffic attained a growth of 4.9 per cent during the quarter under review to stand at 1.27 billion minutes up from 1.21 billion minutes recorded in the previous quarter.

Mobile to fixed network traffic experienced a 5.6 per cent decline to post 15.9 million minutes down from 19.8 million minutes recorded in the previous quarter. The decline of mobile to fixed traffic is as a result of the declining fixed network subscriptions.

The trend in local mobile voice traffic is summarized in Table 4.

Table 4: Local Mobile Voice Traffic in Minutes

Mobile Traffic	Oct-Dec 15	Jul-Sep 15	Quarterly Variation (%)	Oct-Dec 14	Jul-Sep 14	Quarterly Variation (%)
Own Network – Own Network	8,982,304,017	9,644,089,586	-6.9	6,449,281,515	6,982,752,707	-7.6
Own Network to Other Mobile Networks	1,272,404,250	1,212,873,879	4.9	936,937,933	1,040,994,283	-10.0
Mobile Network to Fixed Network	15,968,998	19,847,086	-19.5	16,160,611	25,186,545	-35.8
Total Traffic Origination (Outgoing)	10,270,677,265	10,876,810,551	-5.6	7,402,380,059	8,048,933,535	-8.0
By Traffic terminating (incoming traffic)						
Own Network – Own Network	8,982,304,017	9,644,089,586	-6.9	6,449,281,515	6,982,752,707	-7.6
Other Mobile Networks to Own Network	1,295,667,381	1,128,846,645	14.8	929,669,094	1,101,158,635	-15.6
Fixed Network to Mobile Network	9,141,859	22,677,742	-59.7	31,913,719	24,075,758	32.6
Total traffic termination (Incoming)	10,287,113,257	10,784,305,834	-4.6	7,418,610,171	8,107,987,100	-8.6

Source: CA, Operators' Returns.

Traffic received from one mobile network to another dropped by 4.6 per cent to register 10.2 billion minutes down from 10.7 billion minutes posted in the previous quarter. Fixed to mobile traffic experienced a decline of 59.7 per cent to record 9.1 million minutes during the quarter under review down from 22.6 million minutes recorded in the previous period.

On-net mobile voice traffic maintained a greater share of the total local mobile traffic to stand at 89.4 per cent up from 88.8 per cent recorded during the previous quarter. Off-net traffic on the other hand declined by 0.6 per centage points to attain a proportion of 10.6 per cent down from

11.2 per cent registered last quarter. The high on-net traffic is as a result of the low calling rates charged to all users calling within the same network by their service providers as compared to the off net charges that are higher in some cases. The proportion of on-net and off-net traffic to total mobile voice traffic is as shown in Figure 4.

Figure 4 : Proportion of On-net and Off-net Voice Traffic



Source: CA, Operators’ Returns.

1.4.2 Voice Traffic by Operator

The period under review experienced mixed trends in terms of local mobile voice traffic per operator. Safaricom Limited lost its market share by 3.8 per centage points to register 72.1 per cent market share down from 75.9 per cent market share recorded in the last quarter. Similarly, its total traffic volume declined to 7.3 billion down from 8.2 billion minutes registered during the previous quarter. On-net and off-net traffic volumes stood at 7.0 billion and 321 million minutes respectively during the period under review.

The local mobile voice traffic for Airtel Kenya Limited declined by a slight margin of 2.1 per cent during the quarter under review to post a total of 1.72 billion minutes down from 1.75 billion minutes posted during the last quarter. However, off-net traffic grew to 691 million minutes during the quarter up from 630 million minutes posted during the last quarter. As a

result, the operator's market share grew by 0.6 percentage points to stand at 16.8 per cent up from 16.2 per cent share reported during the previous quarter.

Orange gained in terms of total mobile voice traffic to register at 1.1 billion minutes during the period up from 824 million minutes during the previous period. On-net and off-net traffic stood at 874 million and 231 million minutes respectively. The market share grew from 7.6 per cent reported in the previous quarter to 10.8 per cent market shares during the period under review.

Equitel (Finserve Limited) recorded on-net traffic of 34.4 million minutes during the quarter up from 25.2 million minutes posted in the previous period. The traffic to other mobile networks stood at 30.5 million minutes whereas on-net traffic registered 3.9 million minutes. The market share grew by 0.1 percentage points to stand at 0.3 per cent during the period under review.

The traffic volumes for each of the mobile operators and the respective market shares are shown in Table 5.

Table 5 : Local Mobile Voice Traffic by Operator

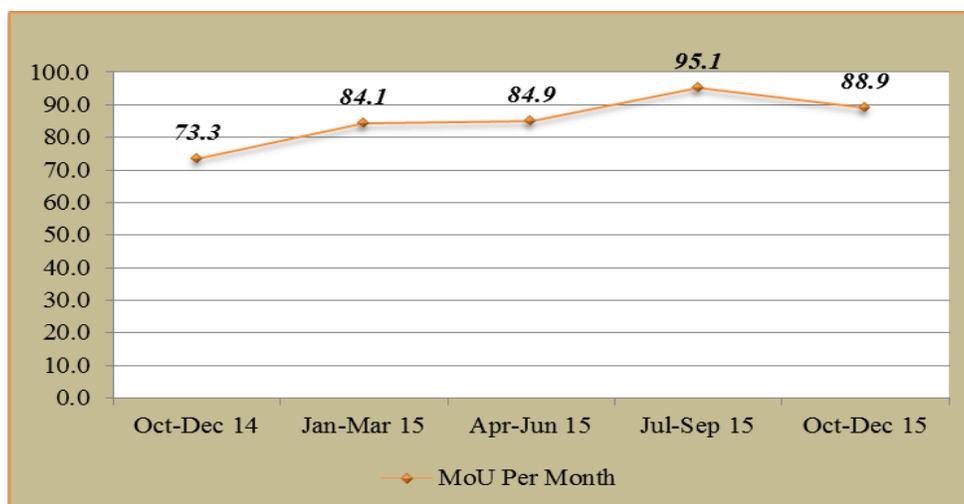
Period	Name of Operator/Indicator	Safaricom Limited	Airtel Networks Kenya Limited	Telkom Kenya Limited (Orange)	Equitel (Finserve)
Oct-Dec 15	On-net	7,072,014,744	1,032,108,000	874,207,880	3,973,393
	Off-net	321,673,815	691,188,232	231,221,695	30,508,294
	Total	7,393,688,559	1,723,296,232	1,105,429,575	34,481,687
	Market share (%)	72.1	16.8	10.8	0.3
Jul-Sep 15	On-net	7,924,904,054	1,129,950,000	586,007,664	3,227,868
	Off-net	322,808,398	630,047,600	238,001,612	22,016,269
	Total	8,247,712,452	1,759,997,600	824,009,276	25,244,137
	Market share (%)	75.9	16.2	7.6	0.2
Oct-Dec 14	On-net	5,888,419,067	247,984,220	311,251,028	1,627,200
	Off-net	331,650,754	474,096,290	147,351,500	-
	Total	6,220,069,821	722,080,510	458,602,52	1,627,200
	Market share (%)	84.0	9.8	6.2	0.0

Source: CA, Operators' Returns.

1.4.3 Minutes of Use

Figure 5 illustrates the Minutes of Use (MoU) per month for each subscriber which declined to 88.9 minutes during the quarter down from 95.8 minutes recorded in the previous quarter, marking a drop of 7.2 per cent.

Figure 5: Minutes of Use



Source: CA, Operators' Returns.

1.4.4 Short Messaging Service

SMS volume increased by 15.3 per cent during the period under review to record 8.1 billion messages up from 7.0 billion messages sent during the last quarter. Similar to the trends exhibited by on-net and off-net local mobile voice traffic, on-net SMS recorded the highest volume as compared to off net SMS. Each subscriber sent an average of 71.8 messages per month up from 61 messages recorded in the last quarter. The increase is attributed to the festive season where friends, families and loved ones exchanged well wishes and seasonal greetings. The number of SMS sent from Safaricom network increased to 7.3 billion during the quarter up from 6.3 billion messages sent during the previous quarter. Safaricom maintained the highest market share for SMS which stood at 90.7 per cent during the quarter up from 89.7 per cent reported last quarter.

The number of SMS sent from Airtel network increased to 669.4 million messages during the period under review up from 612.0 million messages sent during the last quarter. However, the market share for SMS dropped by 0.5 per cent to stand at 8.2 per cent during the period under review.

The SMS traffic for Orange Kenya on the other hand declined by 27.7 per cent during the quarter to register 81 million messages down from 112 million messages posted during the last quarter.

Finserve Limited recorded 7.9 million SMS during the quarter up from 4.6 million SMS sent during the previous quarter. Its market share for SMS remained at 0.1 per cent.

SMS traffic and the corresponding market share per operator is as shown in Table 6.

Table 6 : Short Messaging Service per Operator

Period	Name of Operator/Indicator	Safaricom Limited	Airtel Networks Kenya Limited	Telkom Kenya Limited (Orange)	Equitel (Finserve Limited)	Total SMS
Oct-Dec 15	On-net	7,213,664,959	388,183,540	32,496,877	960,153	7,635,305,529
	Off-net	146,222,663	281,255,546	49,124,085	6,996,477	483,598,771
	Total	7,359,887,622	669,439,086	81,620,962	7,956,630	8,118,904,300
	Market Share (%)	90.7	8.2	1.0	0.1	
Jul-Sep 15	On-net	6,189,714,008	375,059,234	29,043,390	379,390	6,594,196,022
	Off-net	119,432,729	236,967,500	83,708,096	4,245,852	444,354,177
	Total	6,309,146,737	612,026,734	112,751,486	4,625,242	7,038,550,199
	Market Share (%)	89.6	8.7	1.6	0.1	
Oct-Dec 14	On-net	6,893,573,832	111,087,663	17,478,150	-	7,022,139,645
	Off-net	140,089,889	77,525,260	72,243,168	-	272,380,167
	Total	7,033,663,721	188,612,923	72,243,168		7,294,519,812
	Market Share (%)	96.4	2.6	0.9	0.0	

Source: CA, Operators' Returns.

1.4.5 Roaming Traffic

During the period under review, Roaming-out (Own Subscribers) voice traffic stood at 23.7 million minutes with roaming within the East African Community (EAC) countries posting 19.6 million minutes while roaming to other countries posted 4.1 million minutes. The total number of roaming out messages stood at 8.4 million with those sent within the EAC countries registered at 2.2 million messages. Total roaming out data stood at 4.2 million MB during the quarter under review with countries other than those in the EAC having a majority of 3.5 million MB.

Roaming-in (Foreign Subscribers) voice traffic registered a total of 29.7 million minutes during the period under review with EAC countries posting at 26.2 million minutes and other countries recording at 3.5 million minutes. Similarly, the total number of roaming out messages was registered at 8.3 million and the EAC countries contributed 4.9 million messages. Roaming in data traffic stood at 2.5 million MB. The increased mobile voice and SMS traffic within the EAC region is mainly as a result of the One Network Area (ONA), which resulted to the capping of the regional retail tariff to USD 0.10 per minute. Moreover, both out-roamers and in-roamers are not charged for receiving calls while roaming across the four member countries.

Roaming out and Roaming in traffic for the quarter is as indicated in Table 7.

Table 7 : Roaming Traffic

Name of Country	Oct-Dec 15					
	Roaming Out (Own Subscribers)			Roaming In (Foreign Subscribers)		
	Voice	SMS	Data (MB)	Voice	SMS	Data (MB)
Uganda	10,169,503	1,026,110	268,909	18,962,090	2,913,344	624,514
Tanzania	3,330,019	962,977	354,606	5,620,658	1,153,600	739,996

Rwanda	4,752,118	223,435	121,055	1,380,387	308,448	139,724
Burundi	33,498	7,045	1,684	33,954	50,164	405
S. Sudan	1,349,382	73,449	503	265,131	485,483	2,568
Sub-Totals	19,634,520	2,293,016	746,757	26,262,220	4,911,039	1,507,207
Others	4,116,537	6,201,596	3,528,463	3,508,803	3,443,508	1,059,657
Totals	23,751,057	8,494,612	4,275,220	29,771,023	8,354,547	2,566,864

Source: CA, Operators' Returns.

1.4.6 International Mobile Traffic

The total international mobile voice traffic received in the country during the period under review decreased by 0.8 per cent to stand at 157.5 million minutes down from 158 million minutes reported in the previous quarter. The incoming traffic from the East African region grew by 3.6 per cent to stand at 56.1 million minutes whereas traffic from other countries decreased by 3.0 per cent to stand at 101 million minutes during the period under review.

The total international outgoing traffic declined by 5.0 per cent in the quarter to register 120.0 million minutes down from 126.3 million minutes posted during the previous quarter. Traffic leaving the country to East African countries also decreased by 11.9 per cent to stand at 36.9 million minutes. Similarly, traffic to other countries declined by 1.6 per cent to register 83.0 million minutes during the quarter under review down from 84.4 million minutes registered during the previous quarter.

During the period under review, SMS volume received from all over the world experienced a decline of 2.8 per cent to stand at 10.9 million messages down from 11.3 million messages reported during the previous quarter. International outgoing SMS also declined by 6.7 per cent to stand at 9.1 million messages during the period under review. International Voice and SMS traffic is as indicated in Table 8.

Table 8: International mobile traffic

Traffic	Region	Oct-Dec 15	Jul-Sep 15	Quarterly Variation (%)
International Incoming Mobile Voice Minutes	<i>EAC</i>	56,157,419	54,225,909	3.6
	<i>Others</i>	101,419,942	104,550,002	-3.0
	Total	157,577,361	158,775,911	-0.8
International Outgoing Mobile Minutes	<i>EAC</i>	36,957,264	41,927,278	-11.9
	<i>Others</i>	83,046,354	84,425,407	-1.6
	Total	120,003,618	126,352,685	-5.0
International Incoming Mobile SMS		10,997,314	11,318,097*	-2.8
International Outgoing			9,772,273	-6.7

Mobile SMS		9,120,631		
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Source: CA, Operators' Returns. * Revised data from Orange Kenya

1.5 Mobile Revenue and Investments

Data on mobile revenue and investments will be updated at the end of the 2015/16 financial year.

Table 9: Mobile Revenue and Investment

Mobile Revenues and Investments*	2014**	2013**	2012**	2011	2010	Variation (%) Over 2013	Variation (%) Over 2012	Variation (%) Over 2011	Variation (%) Over 2010
Mobile Revenue (KES Millions)	172,501	140,233	133,508	116,640	104,552	23.0	5.0	14.5	11.6
Mobile Investments (KES Millions)	32,133	30,387	33,827	34,590	27,126	5.7	-10.2	-2.2	27.5

Source: CA, Operators Returns, (*) includes Telkom Fixed Network Revenue and Investment.

1.6 Employment in the Mobile Service Industry

Data on the number of staff will be updated at the end of the 2015/16 Financial Year.

Table 10 : Staff in Mobile Sector

Staff	Jun - 15	Jun - 14	Jun - 13	Jun - 12	Jun - 11	Jun - 10	Variation (%) Over 2014	Variation (%) Over 2013	Variation (%) Over 2012	Variation (%) Over 2011	Variation (%) Over 2010
Male Staff	3,549	3,795	3,535	3,489	3,769	3,817	-6.5	7.4	1.3	-7.4	-8.6
Female Staff	2,598	2,644	2,082	2,053	2,058	2,052	-1.7	27.0	1.4	-0.2	-0.05
Total Staff	6,147	6,439	5,617	5,542	5,827	5,869	-4.5	14.6	1.4	-4.9	-5.6

Source: CA, Operators Returns, (*) includes Telkom Fixed Network.



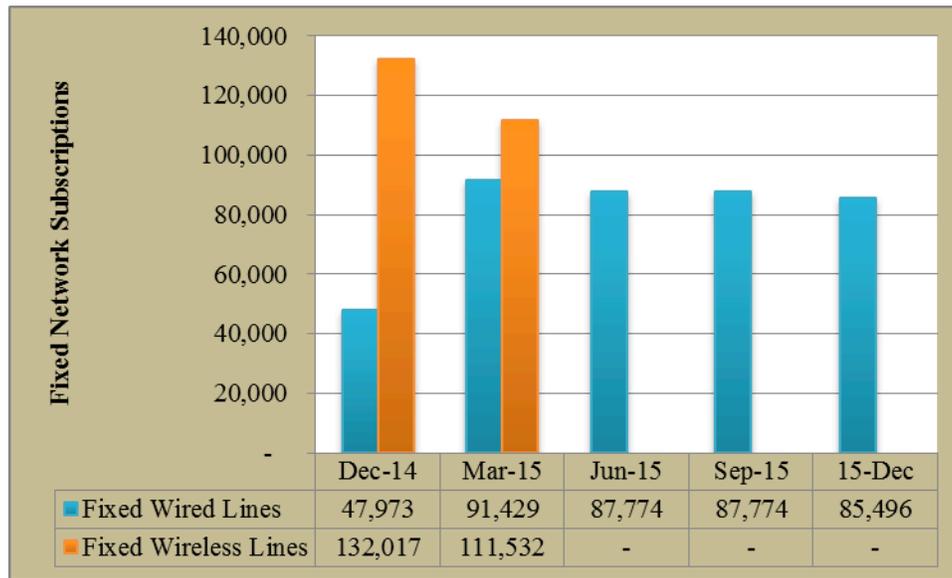
2 FIXED TELEPHONE SERVICE

2.1 Fixed Network Subscriptions

During the second quarter of the FY 2014/2015, fixed telephone service maintained a downward trend as it has been the case for the previous quarters. The number of subscriptions decreased by 2.6 per cent to reach 85,496 down from 87,774 subscriptions posted at the end of last quarter.

The trend in fixed network subscriptions is illustrated in Figure 6.

Figure 6 : Fixed Network Subscriptions



Source: CA, Operators Returns.

2.2 Fixed Network Traffic

The volume of fixed network traffic declined during the quarter under review, a trend that has been observed for some time now. The total local fixed network traffic stood at 541,262 minutes recording a decrease of 0.3 per cent when compared to the 542,722 minutes posted last quarter.

Table 11 illustrates the trend in fixed network traffic.

Table 11: Local Fixed Network Traffic in Minutes

Local Fixed Network traffic	Oct-Dec 15	Jul-Sep 15	Quarterly Variation (%)	Oct-Dec 14	Jul-Sep 14	Quarterly Variation (%)
<i>Intra-network traffic</i>						
Fixed-fixed	541,262	542,722	-0.3	351,838	404,726	-13.1
Fixed Wireless-fixed wireless	0	0	0	4,460,479	5,501,122	-18.9
<i>Inter-network traffic</i>						
Inter-Fixed Networks	0	0	0	20,299,589	26,483,787	-23.4
Total Local Fixed network traffic	541,262	542,722	-0.3	25,111,906	32,389,635	-22.5

Source: CA, Operators' Returns.

Fixed network traffic received from all over the world recorded a slight increase of 3.2 per cent to stand at 2.39 million minutes up from 2.32 million minutes.

International outgoing fixed traffic dropped by 0.5 per cent to post 2.25 million minutes down from 2.26 million minutes posted last quarter.

The trend in international fixed network traffic is illustrated in Table 12.

Table 12 : International Fixed Voice Traffic

International Fixed Network traffic	<i>Oct-Dec 15</i>	<i>Jul-Sep 15</i>	<i>Quarterly Variation (%)</i>	<i>Oct-Dec 14</i>	<i>Jul-Sep 14</i>	<i>Quarterly Variation (%)</i>
International Incoming Fixed Network Voice traffic	2,395,499	2,321,498	3.2	2,516,815	3,148,409	-20.1
International Outgoing Fixed Network Voice traffic	2,251,603	2,263,843	-0.5	3,653,701	3,888,936	-6.1

Source: CA, Operators Returns.

3 DATA/INTERNET SERVICES

3.1 Data/Internet Service

The data market in the country has grown significantly over time with increased growth in subscriptions as witnessed during the quarter under review. The number of subscriptions recorded an increase of 10.6 per cent to stand at 23.9 million subscriptions up from 21.6 million posted during the last quarter. Subsequently, the number of data/internet users grew by 11.1 per cent to stand at 35.5 million during the period under review up from 31.9 million subscriptions reported as at the end of the previous period. This translated to an internet/data penetration level of 82.6 per cent up from 74.2 per cent recorded during the previous quarter.

Mobile data held pole position with 23.7 million subscriptions representing an increase of 10.2 per cent from 21.5 million subscriptions recorded last quarter. The growth in mobile data/internet is attributed to the increased affordability of Internet bundles offered by the various internet/data providers as result of increased fair competition in the data/internet market. Growth of e-commerce services and social networking sites is also a factor leading to increased internet/data usage. The use of utility services such as online mobile banking, online research on mobile devices by most Kenyans has also fuelled the uptake of internet/data services.

Terrestrial wireless data subscriptions increased remarkably during the quarter under review to register 19,507 subscriptions up from 13,221 recorded during the last quarter marking a growth of 47.5 per cent.

Satellite subscriptions on the other hand registered a notable decline of 32.1 per cent to stand at 489 down from 720 subscriptions registered in the last quarter. The growth in fibre optic subscriptions has remained steady over the period with the quarter under review registering 111,354 subscriptions up from 100,192 subscriptions recorded in the last quarter representing an

increase of 11.1 per cent during the period. The number of data/internet subscriptions and users is as indicated in Table 13.

Table 13 : Internet Subscriptions and Internet Users

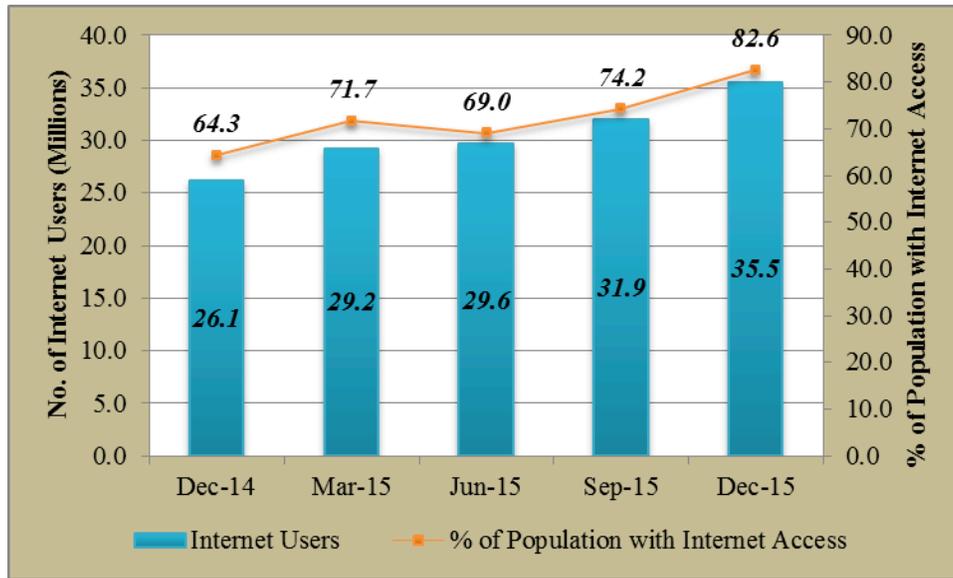
Internet/Data Subscriptions	<i>Dec-15</i>	<i>Sep-15</i>	<i>Quarterly Variation (%)</i>	<i>Dec-14</i>	<i>Sep-14</i>	<i>Quarterly Variation (%)</i>
Total Internet Subscriptions	23,929,657	21,628,271	10.6	16,453,019	14,845,967	10.8
Mobile Data Subscriptions	23,794,550	21,511,638	10.6	16,338,990	14,745,836	10.8
Fixed Wireless Data Subscriptions	19,507	13,221	47.5	17,537	16,999	3.2
Satellite Data Subscriptions	489	720	-32.1	712	598	19.1
Fixed DSL Data Subscriptions	3,732	2,500	49.3	14,512	12,394	17.1
Fixed Fibre Optic Data Subscriptions	111,354	100,192	11.1	81,243	70,115	15.9
Fixed Cable Modem Subscriptions	25	25	0.0	25	25	0.0
Estimated Internet Users²	35,549,620	31,985,048	11.1	26,163,560	23,229,026	12.6

Source: CA, Operators' Returns.

The trends on internet/data usage and penetration are as demonstrated in Figure 7.

Figure 7: The trend in estimated Number of Internet Users and Internet Penetration

²Total no. of Internet users = (1MD+10TW+100FFOS) where MD is the number of mobile data/internet subscriptions; TW is the terrestrial wireless subscriptions; and FFOS by 100 is fixed DSL, Fibre optic and satellite subscriptions. There is no scientific method of estimating internet users; for the purpose of this report the methodology is adopted from the recommendation from ITU

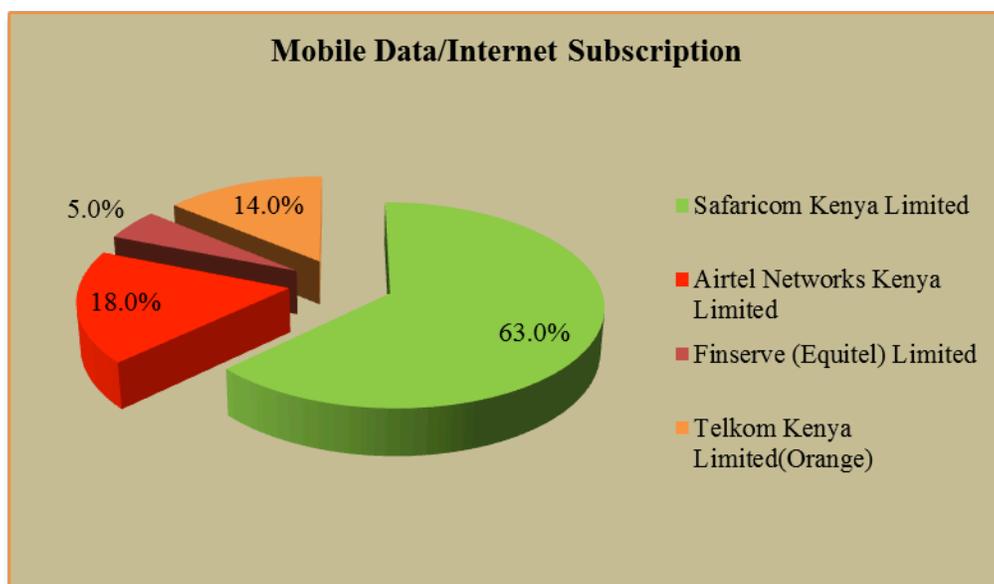


Source: CA, Operators' Returns.

As indicated in Figure 8, Safaricom Kenya Limited maintained the highest market share in terms of mobile data/internet. During the quarter under review, its market share remained unchanged at 63.0 per cent recorded as at the end of the previous quarter. Airtel Networks Limited and Orange Kenya posted market shares of 18.0 per cent and 14.0 per cent, respectively. Finserve Africa Limited on the other hand attained a market share of 5.0 per cent.

The market shares for mobile data/Internet market by operator are as shown in Figure 8.

Figure 8 : Mobile data/Internet Subscriptions



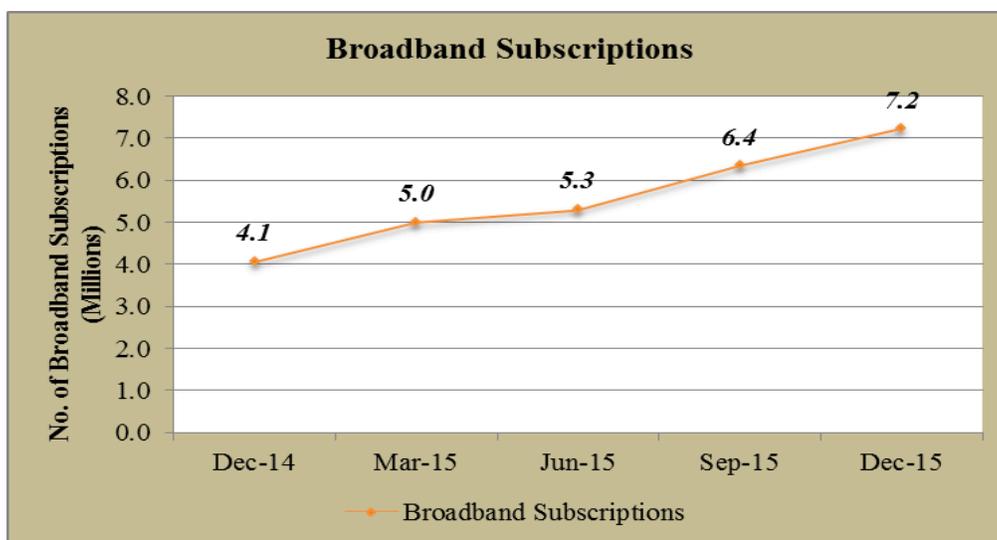
Source: CA, Operators' Returns.

3.2 Broadband Services

3.2.1 Data / internet broadband subscriptions

As illustrated in Figure 9, during the quarter under review broadband subscriptions recorded a significant growth of 13.9 per cent to stand at 7.2 million up from 6.3 million subscriptions reported in the last quarter. This translated to a broadband penetration level of 16.8 per cent during the period under review.

Figure 9 : Broadband Subscriptions

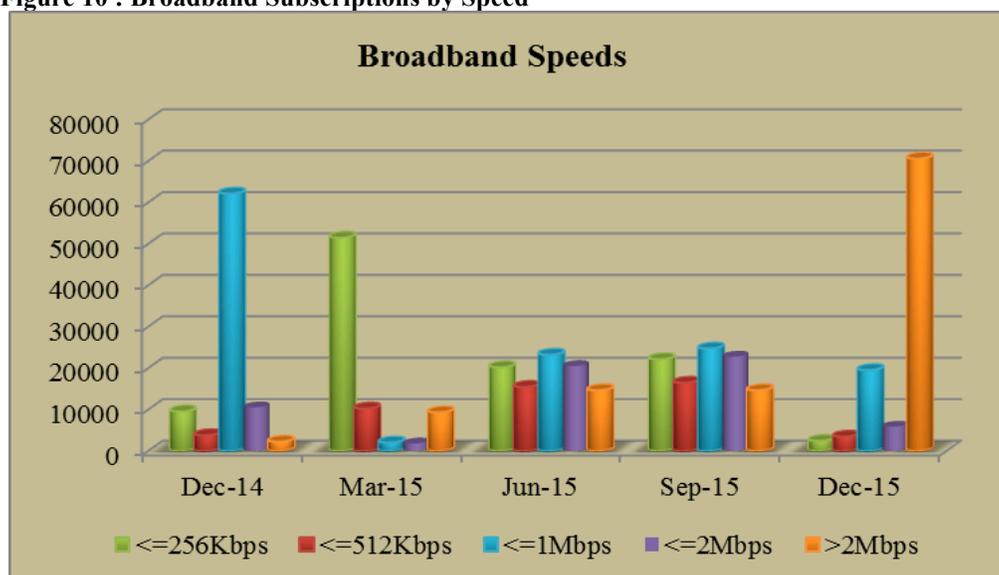


Source: CA, Operators' Returns.

3.2.2 Broadband subscriptions by Speed

Broadband speeds of more than 2Mbps recorded the highest numbers of subscriptions while those less than or equal to 256Kbps recorded the least number of subscriptions during the quarter under review.

Figure 10 : Broadband Subscriptions by Speed



Source: CA, Operators' Returns.

3.3 International Bandwidth

During the period under review, the amount of international internet bandwidth available in the country (Lit/equipped capacity) grew slightly to reach 1.55 Million Mbps up from 1.54 Million Mbps recorded during the last quarter representing an increase of 0.1 per cent during the quarter.

Satellite capacity increased by 43.1 per cent to reach 498.2Mbps up from 348.2Mbps recorded during the last quarter. The trend on international available bandwidth is as shown in Table 14.

Table 14 : International Internet Available Bandwidth (Mbps)

International Connectivity Bandwidth	Dec-15	Sep-15	Quarterly Variation (%)	Dec-14
SEACOM	770,000	770,000	0.0	565,440
TEAMS	702,000	700,000	0.3	119,970
Telkom Kenya Limited (EASSY)	39,060	39,063	0.0	120,880
Lion 2	39,210	39,210	0.0	40,960
Satellite Internet Bandwidth	498.20	348.2	43.1	273.0
Total International Internet Bandwidth (Mbps)	1,550,771	1,548,621	0.1	847,523

Source: CA, Operators' Returns.

The total international Internet bandwidth used during the period under review increased by 7.8 per cent to stand at 854,300 Mbps up from 792,300 Mbps reported during the previous quarter.

The undersea cable used bandwidth increased by 7.8 per cent to register 854,550.90 Mbps during the quarter up from 792,610.90 Mbps recorded in the last quarter. However the international satellite Internet bandwidth used declined by 19.6 per cent to stand at 250.90 Mbps down from last quarter's 310.90 Mbps. The trend in international used bandwidth is shown in Table 15.

Table 15 : International Internet Used Bandwidth (Mbps)

International Leased (Used) Bandwidth	Dec-15	Sep-15	Quarterly Variation (%)	Dec-14	Sep-14	Quarterly Variation (%)
International Undersea Internet Connectivity Bandwidth (Mbps)	854,300	792,300.00	7.8	498,015	477,854	4.2
International Satellite Internet Connectivity Bandwidth	250.90	310.90	-19.6	106.1	220	-51.8
Total International Internet Connectivity Bandwidth (Mbps)	854,550.90	792,610.90	7.8	498,121	478,074	4.2

Source: CA, Operators' Returns.

3.4 Registered Domain Names

The number of domain names.KE as at 31st December 2015 was recorded at 51,548 as shown in Table 16. “.co.ke” (companies) held the highest share of 92.5 per cent.

Table 16 : Number of Domain names

Sub-Domain	Use	Dec-15		Sep-15	
		No. of Domains	Per centage (%)	No. of Domains	Per centage (%)
CO.KE	Companies	47,803	92.73	42,927	92.49
GO.KE	Government Entities	350	0.68	329	0.71
OR.KE	Non Profit Making Organizations	1,579	3.06	1,462	3.15
AC.KE	Institutions of Higher Education	849	1.65	843	1.82
SC.KE	Lower and Middle Level Institutions	334	0.65	281	0.61
NE.KE	Personal Websites and E-mail	138	0.27	112	0.24
ME.KE	Personal Websites and E-mail	327	0.63	299	0.64
MOBI.KE	Mobile Content	50	0.09	49	0.11
INFO.KE	Information	118	0.23	109	0.23
Total		51,548	100	46,411	100

3.5 Revenue and Investment in the Data/Internet Market

The revenues and investments for the data/internet sector will be updated at the end of 2015/2016 financial year.

Table 17 : Data/Internet Revenue and Investment

Data/Internet Revenue and Investments	2014*	2013	2012	2011	2010	Variation (%) Over 2013	Variation (%) Over 2012	Variation (%) Over 2011	Variation (%) Over 2010
Data/Internet Revenue (KES Millions)	10,158	21,941	25,627	13,710	8,659	-53.7	-14.4	86.9	58.3
Data/Internet Investments (KES Millions)	3,440	3,537	6,115	5,079	3,520	-2.7	-42.2	20.4	44.3

Source: CA, Operators' Returns. * Note that revenue and investments in data market excludes data revenues from the mobile sector

4 BROADCASTING

4.1 Digital Television

As at 31st December 2015, the cumulative number of free to air TV channels that were on air on the digital terrestrial platform grew from 55 the previous quarter to 62 while the number of pay TV service providers on the DTT remained 2 (GoTV and Startimes).

4.2 Digital Terrestrial Television sites rollout

By 31st Dec 2015, the digital signal was on air in Nairobi, Nakuru, Nyeri, Mombasa, Kisumu, Webuye, Eldoret, Malindi, Meru (Nyambene), Kisii, Kericho, Narok, Nyahururu, Embu, Kisii, Machakos, Murang'a, Naivasha, Nyeri, Webuye, Narok, Mbuinzau, Kapenguria, Wajir, Kitui, Lamu and Namanga. This coverage translates to 60 per cent population coverage.

4.3 Set top Boxes

The cumulative number of digital Set Top Boxes purchased by consumers stood at 416,984 FTA STBs and 2,677,909 PAY TV STBs bringing the total to 3,094,893 on DTT platform.

4.4 FM Radio Broadcast

The total number of FM stations stood at 139 up from 137 in the previous quarter.

5 POSTAL AND COURIER SERVICES

5.1 Postal and Courier Traffic

During the period under review, the volume of letters posted locally increased remarkably by 35.6 per cent to stand at 17.6 million letters up from 12.9 million letters posted last quarter. Similarly, the number of courier items sent during the quarter was registered at 445, 836 items marking a significant growth of 46.1 per cent.

On the other hand, the volume of letters received from other countries dropped by 6.5 per cent during the quarter to stand at 2.2 million down from 2.4 million letters received during the previous quarter. International outgoing letters doubled during the period under review when compared to the previous quarter to post 2.6 million letters. The remarkable growth in postal and courier traffic is attributed to the festive season, which is usually marked by intense exchange of greeting cards and gifts between relatives and friends. K.C.P.E and K.C.S.E exams were also undertaken during the same period and therefore posting of success cards by relatives and friends contributed to the growth in traffic for letters and courier items sent locally.

Table 18 : Postal and Courier Traffic

Post and Courier Traffic	<i>Oct-Dec 15</i>	<i>Jul-Sep 15</i>	<i>Quarterly Variation (%)</i>	<i>Oct-Dec 14</i>
Number of Letters (Up to 350 gms) Posted Locally	17,613,809	12,988,125	35.6	13,118,616
Total Courier Items Sent Locally	445,836	305,248	46.1	964,258
International Incoming Letters (Up to 350 gms)	2,285,817	2,444,108	-6.5	2,461,845
International Outgoing Letters (Up to 350 gms)	2,665,410	1,377,627	93.5	812,923

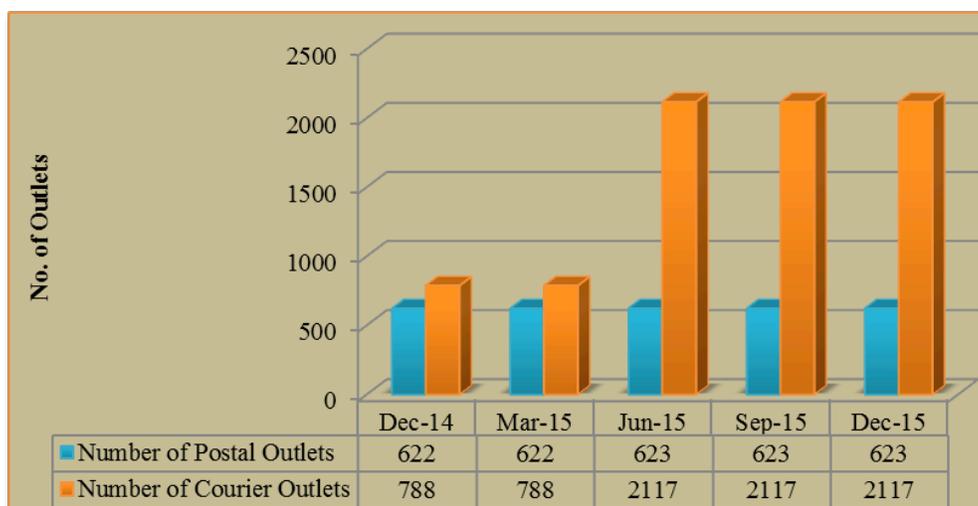
Source: CA, Operators' Returns,

5.2 Number of Postal and Courier Outlets

During the period under review, the number of postal and private courier outlets remained at 623 and 2,117 outlets respectively.

The number of postal and private courier outlets is as illustrated in figure 11.

Figure 11: Number of Postal Outlets



Source: CA, Operators' Returns,

5.3 Postal and Courier Revenue and Investments

Table 19 below on revenues and investments in the postal and courier sub-sector will be updated at the end of the financial year 30th June 2016.

Table 19 : Postal and Courier Revenue and Investments

Post/Courier Revenue and Investment	2014	2013	2012	2011	2010	Variation (%) Over 2013	Variation (%) Over 2012	Variation (%) Over 2011	Variation (%) Over 2010
Revenue (KES Millions)	8,530	7,086	7,467	11,793	10,694	20.4	-5.1	-36.7	11.0
Investments (KES Millions)	397	519	390	504	672	-23.5	33.1	-22.6	-25.0

Source: CA, Operators' Returns,

6 TARIFFS, PROMOTIONS & SPECIAL OFFERS

During the quarter under review, the Authority received a total of 8 applications for both promotions and special offers, and tariffs. All applications were reviewed and approved. The tables 20 and 21 below give a breakdown of tariffs and promotions per operator in the various categories:

Table 20: Tariffs filled by the respective service providers

Service Provider	Oct 2015 –Dec 2015					
	Voice	SMS	Data	Bundles	Other	Total
Safaricom	1	-	3	-	1	5
Airtel	-	-	-	-	-	-
Orange	2	-	-	1	-	3
Total	3	-	3	1	1	8

Source: CA, Operator filings.

Table 20 demonstrates that majority of the services introduced in the market during the period under review targeted voice and data services consumers. The number of tariffs filed for data services remained highest as a result of continued rollout of Internet services by operators; increased uptake of data/internet services by consumers; proliferation of smart devices; and the availability of low-cost data/internet devices in the market.

Table 21 : Promotion filled by the respective service providers

Service Provider	Oct 2015 –Dec 2015					
	Voice	SMS	Data	Bundles	Other	Total
Safaricom	1	-	2	1	4	8
Airtel	-	-	-	-	-	-
Orange	-	-	-	-	-	-
Total	1	-	2	1	4	8

Source: CA, Operator filings.

In the case of promotions and special offers, majority of the promotions focussed on the non-traditional services. These included mobile-money and loyalty reward schemes as shown in Table 21 above.

7 CONCLUSION

The quarter under review was marked by significant growth and increased uptake for ICT services in the country. This growth is evidence that the current government policies on ICT have been effective. Local and international mobile SMS increased significantly during the quarter as a result of the high festive season during which friends and relatives exchanged greetings and well wish messages. However, the local mobile traffic declined slightly. During the quarter under review, mobile money services remained key in providing safe, secure and cheap financial services in areas where with no access to formal banking systems. Kenyans were able to pay for utilities, online government services and buy goods and services using their mobile phones.

The data/internet segment maintained an upward trend as e-commerce and e-government services continued to thrive. The increased uptake of social media platforms, OTTs and other mobile applications resulted to increased demand for and use of bandwidth in the country during the period under review. The same trend is expected in the coming quarters as service providers promise to launch new and better data/internet services.

The postal and courier market segment, which exhibited downward trends in the previous quarters, reported an increase in the number of letters and courier items sent during the period under review. This growth was as a result of the national examinations which are conducted around the same period as well as the Christmas and New Year festive season during which families, relatives and friends highly exchanged success cards and greetings cards,.

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