



**FIRST QUARTER BROADCASTING SERVICES
REPORT
FINANCIAL YEAR 2023/24**

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EXECUTIVE SUMMARY

During the period under review, a total of 15 licenses were issued to broadcasting service providers for radio and television broadcasting services, bringing the total number of licensed broadcasting service providers to 655 as of 30th September 2023. The total number of broadcasters who were operational increased from 100 TV and 186 FM in the year 2019/2010 to 214 TV and 291 FM, respectively, at the end of the first quarter,

The subscriptions to broadcasting services grew by 125,895 (2.02%) to a total of 6,343,127 subscriptions. The subscriptions to DTT and DTH grew by 26,138 and 92,275, respectively, and for cable broadcasting services, 7,482. There was no growth in DTT population coverage, which remained at 92.13%.

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 decreased marginally from 91.95 to 91.67%, while for radio broadcasting, the compliance level registered an improvement from 97.1% to 98.3%

I. INTRODUCTION

The ICT sector law mandates the Communications Authority of Kenya (CA) to promote and facilitate 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 first quarter of FY 2023/24.

II. STRATEGIC IMPLICATIONS

In its Strategic Plan 2023-27, the Authority, under Strategic Goal on Empowerment and Protection of Consumers of ICT Services and Key Result Area on Consumer Protection, committed to ensuring compliance with regulatory requirements.

III. THE BROADCASTING MARKET

a) Licences issued during the period under review

The Authority issued 15 licenses compared to 23 licences that were issued in the last quarter. Figure 1 provides the trend in the number of licences issued in various categories.

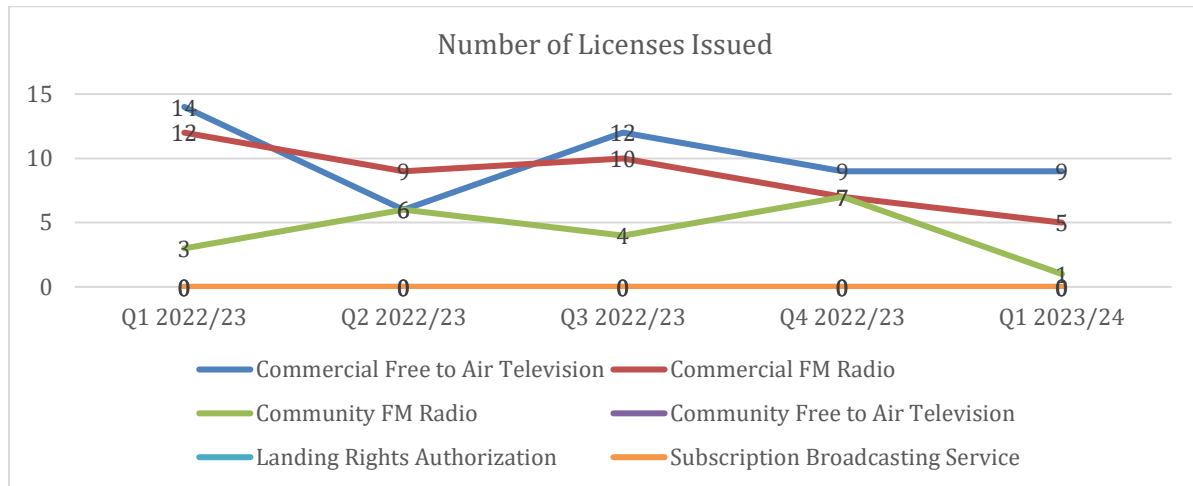


Figure 1: Trend on the number of licenses issued

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 under the broadcasting sub-sector up as of the end of the first quarter of the financial year 2023/24 was 655.

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Figure 2 shows the growth in the number of broadcasting stations that were operational from 100 TV and 186 FM radio in the year 2019/2020 to 214 TV and 291 FM radio during the period under review.

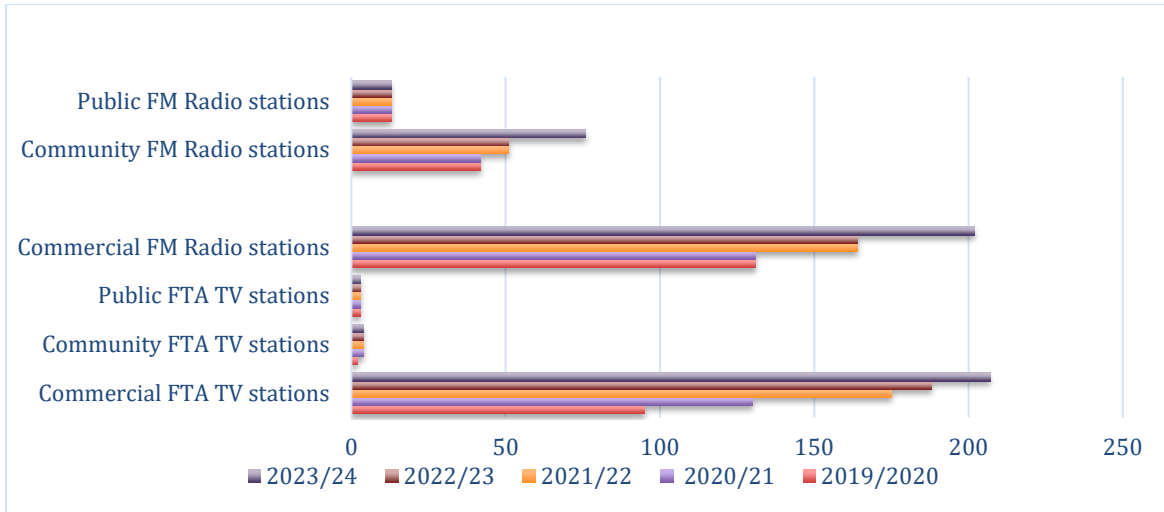


Figure 2: Growth in the number of FM and TV broadcasting stations

b) Subscription to the Broadcasting Services

During the third quarter, subscriptions to broadcasting services grew by 125,895 (2.02%) to a total of 6,343,127 at the end of September 2023 from 6,217,232 reported during the preceding quarter. Figure 3 illustrates the trend in subscriptions for broadcasting services for the past five quarters to the end of Q1 of FY 2023/24

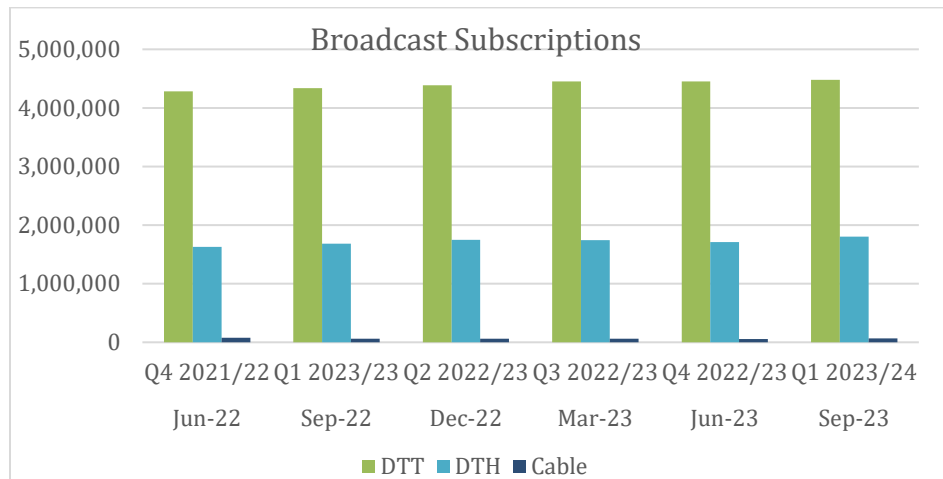


Figure 3: Trend in subscriptions for broadcasting services

The DTT remained the most popular platform to access subscription broadcasting services, accounting for 70.58 %, while DTH accounted for 28.40% of the total number of subscriptions to broadcasting services as of 30th September 2023. This could be due to the relative affordability of monthly subscription fees compared to cable and 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 being for cable television services, which could be attributed to the low cable footprint due to the high cost of setting up the infrastructure compared to other forms of media.

During the quarter, subscriptions to DTT grew by 26,138 (0.59%) compared to the growth of 43,043 in the last quarter, resulting in a total of 4,476,826 while the subscriptions to DTH services also grew by 92,275 (5.4%), resulting in a total of 1,801,670 subscriptions. The subscription to cable broadcasting services grew by 7,482 (13.1%), resulting in a total of 64,631.

c) Digital Terrestrial TV (DTT) Population coverage

During the quarter, there was no change in DTT population coverage, and it remained at 92.13%.

IV. BROADCAST CONTENT STANDARDS PERFORMANCE

During the period July to September 2023, the Authority monitored a total of thirty-six (36) TV broadcasting stations and twenty-four (24) 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 compliance levels with minimum local content quota increased from 89.4% to 91.7 %, while compliance with the programming guidelines for the watershed period and children protection decreased from 98.1 to 97.2%, compared with Quarter 4 of FY 2022/23. The compliance with religious programming guidelines stood at 88.9%, while that of accessibility to broadcasting services by PWDs was at 100%. The overall compliance level with the TV broadcasting code stood at 92.6%

With respect to the radio stations, The compliance levels with programming guidelines for the watershed period increased from 90.5% to 95.8%, while Children’s programming and Good taste and decency stood at 95.5%. The overall compliance level with the TV broadcasting code stood at 98.3%