



THIRD QUARTER BROADCASTING SERVICES REPORT FINANCIAL YEAR 2023/24

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EXECUTIVE SUMMARY

During the period under review, a total of nine (9) licenses were issued to broadcasting service providers for radio and television broadcasting services, bringing the total number of licensed broadcasting service providers to 685 as of 31st March 2024. The total number of broadcasters who were operational are 219 TV and 246 FM radio stations as the end of the third quarter.

The total subscriptions to broadcasting services registered a marginal increase by 0.1 per cent to a total of 6,373,288 at the end of March 2024 from 6,367,038 reported in the previous quarter. The subscriptions to DTT grew by 0.8 per cent, DTH decreased by 1.6 per cent, while cable broadcasting services decreased by 0.4 per cent. The DTT population coverage remained at 92.13 per cent.

The broadcast content standards are set out in the Programming Code, and have been broadly characterized as watershed period, children protection, advertisements, local content, and accessibility for persons with disabilities. The compliance levels for TV broadcasting and radio broadcasting were 95.13 per cent and 92.8 per cent respectively.

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 third 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, is committed to ensuring compliance with regulatory requirements.

III. THE BROADCASTING MARKET

a) Licenses issued during the Quarter

The Authority issued nine (9) licenses compared to 21 licences that were issued in the last quarter. Figure 1 provides the trend in the number of licences issued in various categories.

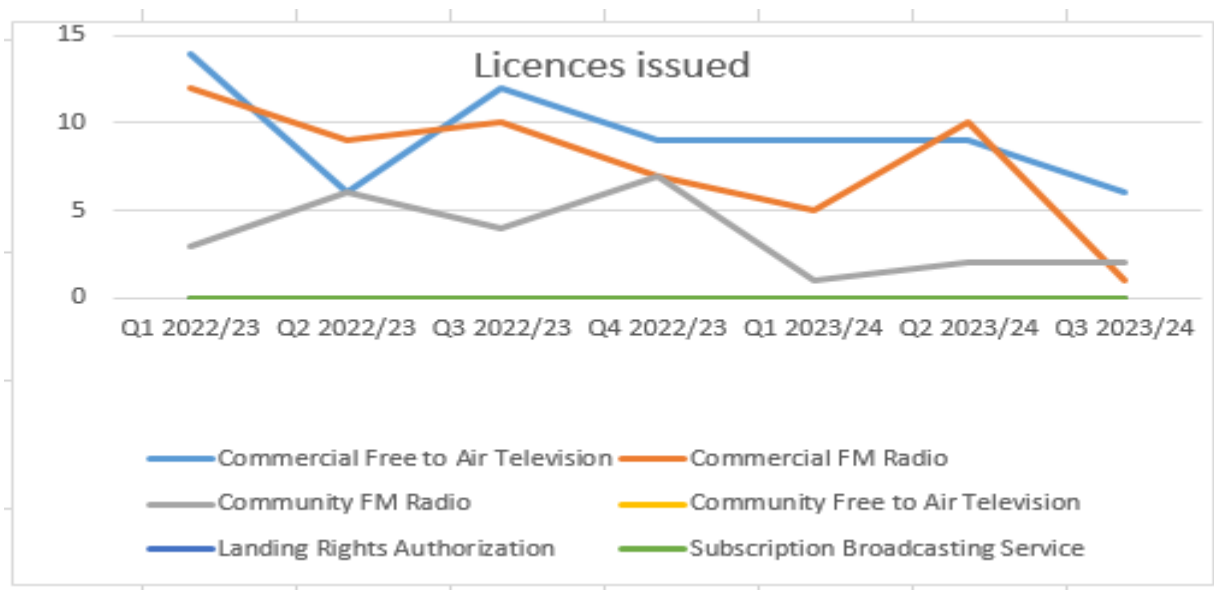


Figure 1: Trends on the number of licenses issued

The licenses issued were only for commercial FM radio (1), community FM radio (2) and commercial FTA TV broadcasting services (6). The cumulative number of licenses issued under the broadcasting sub-sector as at end of the third quarter of the financial year 2023/24 was 685.

b) Subscription to the Broadcasting Services

During the third quarter, subscriptions to broadcasting services registered a marginal increase of 9,250 (0.1%) to push the total subscriptions to **6,373,288** at the end of March 2024 from **6,367,038** reported in the previous quarter. Figure 2 illustrates the trend in subscriptions for broadcasting services from Q4 of FY 2021/22 to the end of Q3 of FY 2023/24

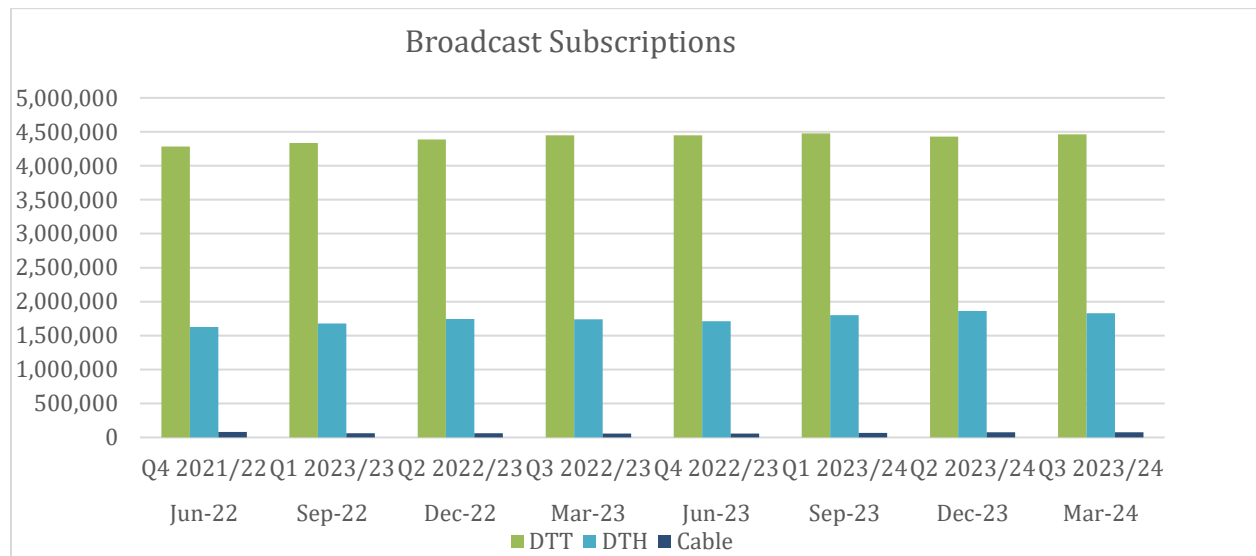


Figure 2: Trend in subscriptions for broadcasting services

Digital Terrestrial Television (DTT) remained the most popular platform to access subscription broadcasting services with 4,465,254 subscriptions followed by DTH with 1,830,251 subscriptions accounting for 70.06 per cent and 28.71 per cent of the total number of subscriptions to broadcasting services respectively as of 31st March 2024. 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 1.2 per cent 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 36,142 (0.8%) resulting in a total of 4,465,254 while the subscriptions to direct to home (DTH) services declined by 29,561 (1.59%), resulting in a total of 1,830,251 subscriptions. The subscription to cable broadcasting services dropped by 331 (0.4%) resulting in a total of 77,783. Overall, the total subscriptions to broadcasting services increased by 9,250 (0.1%) subscriptions in the third quarter to a total of 6,373,288 subscriptions.

c) Digital Terrestrial TV (DTT) Population coverage

During the quarter, there was no change in DTT population coverage as no new DTT transmitters came online and hence it remained at 92.13 per cent.

IV. BROADCAST CONTENT STANDARDS PERFORMANCE

During the period of January to March 2024, the Authority monitored a total of 22 TV broadcasting stations and 12 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 decreased from 90.9 percent to 87.5 per cent percent while compliance with the programming guidelines for the watershed period, children protection religious programming guidelines stood at 100 per cent, while that of accessibility to broadcasting services by persons living with disabilities was at 87.5 per cent The overall compliance level with TV broadcasting code decreased from 96.4 to 95.13 per cent.

With respect to radio broadcast stations, the compliance levels with programming guidelines for the watershed period increased from 81.8 to 83.3 per cent, while children's programming and good taste and decency stood at 95.2 per cent. The overall compliance level with the radio broadcasting code increased from 90.03 to 92.8 per cent.