



UGANDA  
COMMUNICATIONS  
COMMISSION

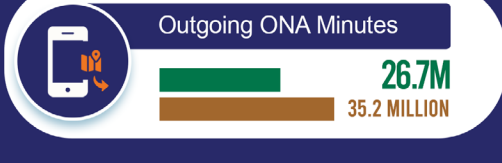
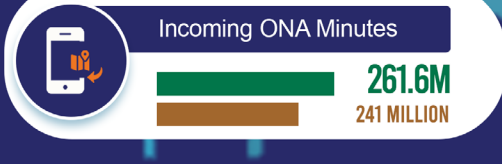
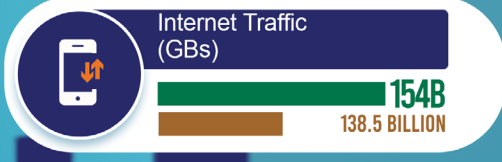
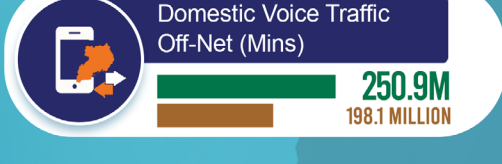
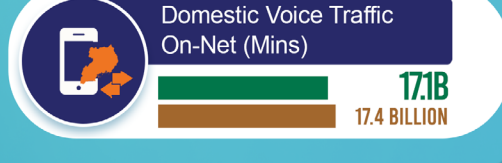
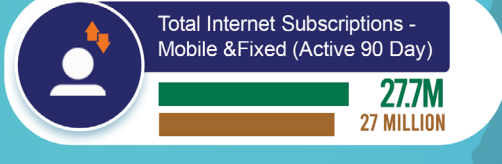
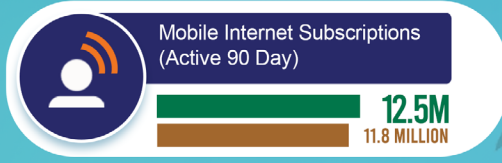
# Market Performance Report

4Q FY 2022/23  
(April - June 2023)

[www.eservices.ucc.co.ug](http://www.eservices.ucc.co.ug)



# Industry Snapshot June 2023



JUN 2023

MAR 2023



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Unique SIM Registrations

13.3 MILLION



Number of SIMs per Subscriber

3:1

98%

Radio Coverage



TV Broadcasters



FTA	PayTV	Hybrid	Online
35	7	34	2

1.6M

PayTV Subscriptions

46

Post and Courier Operators



4,963

Towers



30,795KM

Fiber Distance



Telecom Financial Performance (UGX)

Telecom Revenues

JUNE 2023:

1.36 TRILLION

MARCH 2023:

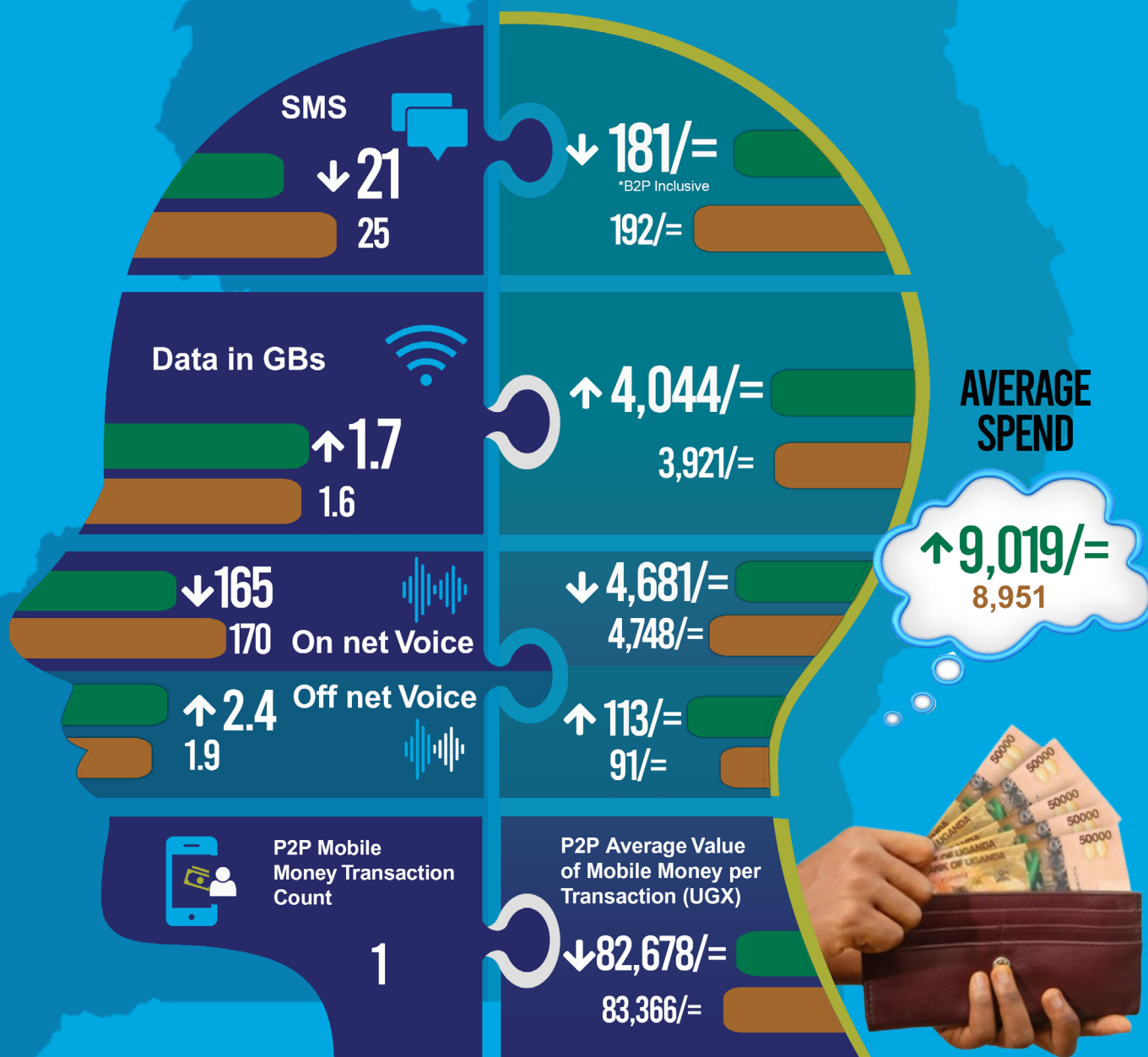
1.34 TRILLION



# June 2023 Average User Profile

## Average Monthly Service Usage (Volumes)

## Monthly Service Usage Spend (UGX)



● Jun 2023

● Mar 2023



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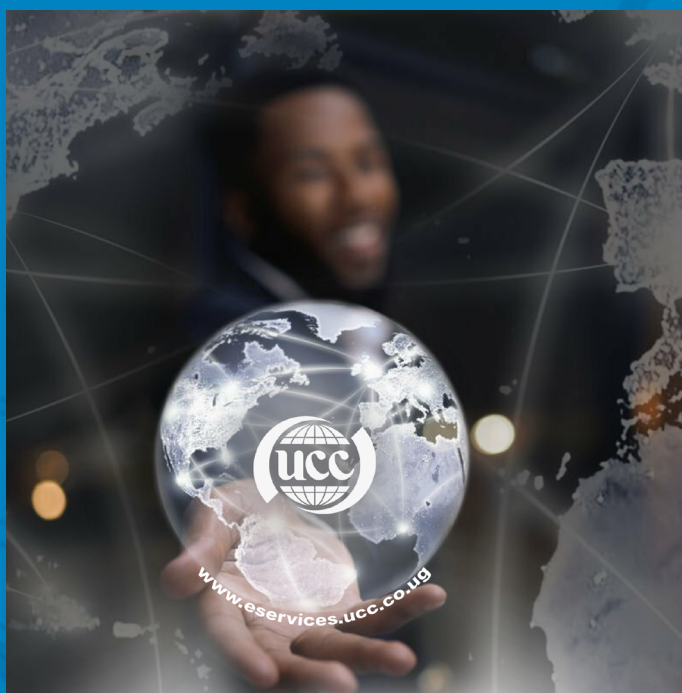
[www.ucc.co.ug](http://www.ucc.co.ug)

# Legal Disclaimer

*The information and figures contained herein were obtained from licensees' submissions to the Commission and other sources available to the Commission. It is intended to provide the communications market overview to:*

- 1. The industry,*
- 2. Prospective entrants,*
- 3. Government,*
- 4. Academia and other stakeholders.*

*UCC does not give any warranty and may not be liable for the interpretation arising from its use or misuse.*



## ***UCC Services go online:***

*Applications for Licenses, Authorisations, Type Approval, Short Codes, Logical Channel Numbers and UCC events are now online in accordance with the Digital Transformation Roadmap for Uganda set by The Ministry of ICT and National Guidance (MoICT&NG).*

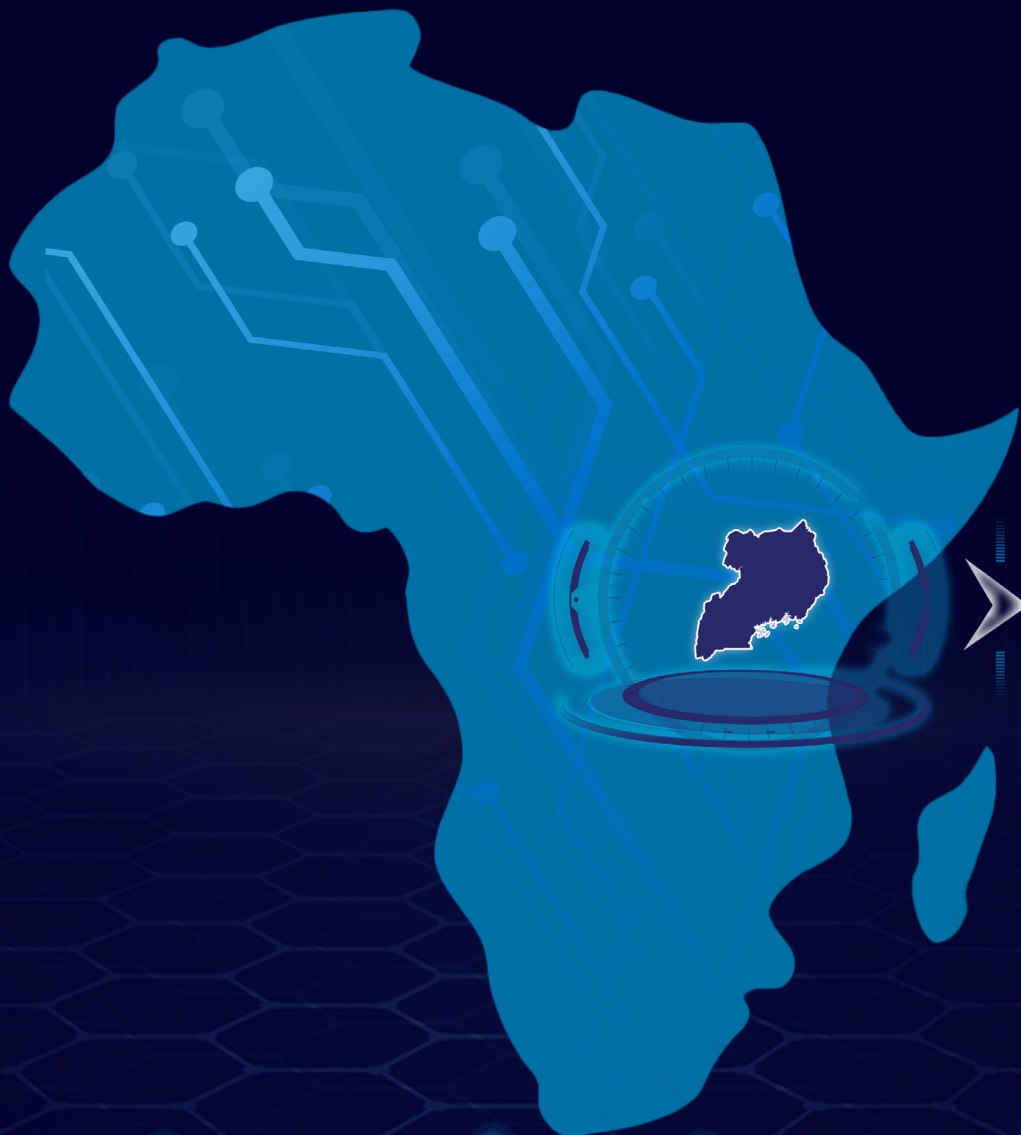


# Introduction

This is a review of the industry performance, trends and key developments for the fourth quarter of the 2022/23 Financial Year starting April to June 2023. The report covers:

1. Domestic Highlights
2. Service Access and Subscriptions
3. Traffic and Usage
4. Financial Performance
5. Post and Courier Sector Highlights
6. Broadcast and Multimedia

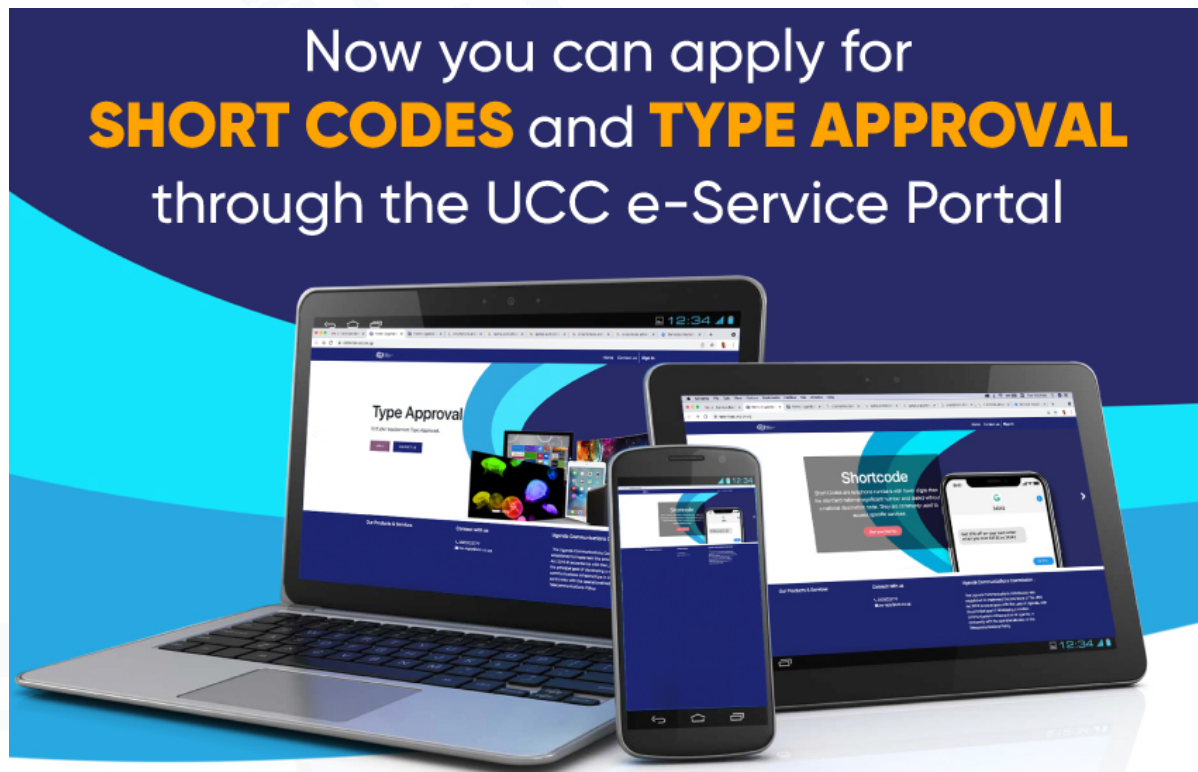
# Domestic Highlights





## 1.1. UCC Online Services go Live

In pursuit of advancing efficiency and enhancing the customer experience in the delivery of telecommunications services, the Uganda Communications Commission (UCC) extended its service offerings to an online e-Services portal, accessible at [www.eservices.ucc.co.ug](http://www.eservices.ucc.co.ug). The portal was created to provide a streamlined and user-friendly platform where clients can easily sign up, apply for, and closely monitor the progress of a variety of critical services.



Visit the link <https://eservices.ucc.co.ug/>  
to access the e-service portal

In case of any challenges, contact our Toll-free line **0800 222 777**



@UCC\_official  
Uganda Communications Commission  
[www.ucc.co.ug](http://www.ucc.co.ug)  
uccinfo.blog

Among the services now available for online access are:

- FM Radio Broadcasting License Application,
- Online Data Communications Authorisation
- Postal and Courier License Application
- Equipment Type Approval Application
- Short Code Application
- Logical Channel Number Application.

These services, governed by the Uganda Communications Act of 2013, encompass a wide spectrum of communication services that fall under the regulatory purview of the UCC.



## 1.2. Uganda Hosts the Sustainable Digital Transformation Week for Africa Region

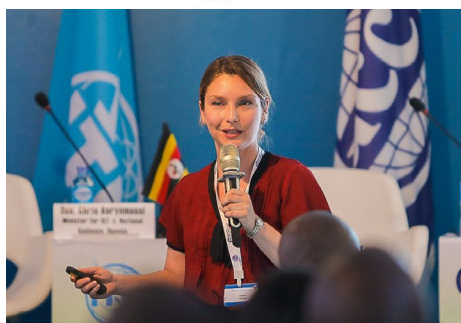
In a historic first, Uganda played host to the Sustainable Digital Transformation Week for the Africa Region in 2023, held from May 15th to May 19th. This event was jointly organized by the International Telecommunication Union (ITU), the African Telecommunication Union (ATU), and the East African Communications Organization (EACO), and it constituted a pivotal annual assembly of ITU's Study Group 5, an entity chaired by Uganda.

The five-day event, hosted at the premises of the Uganda Communications Commission, saw a turnout of over 200 attendees, including government officials, industry leaders, and experts from various corners of Africa. Central to the event's mission was the initiation of a global dialogue and the concerted pursuit of sustainable digital transformation, with a specific focus on the African context.

At the forefront of the forum's objectives was the establishment of an international platform where stakeholders from diverse backgrounds could convene to exchange experiences, identify shared solutions, and explore avenues for harnessing digital technologies. The overarching aim was to enhance efficiency, productivity, and innovation, all while promoting the Sustainable Development Goals and mitigating adverse environmental and societal impacts.



**Above (Sitted L-R):** Eng. Dr. Dorothy Okello - UCC Board Chair, Dr. Chris Baryomunsi - Minister for ICT and National Guidance, Dr. Ally Yahaya Simba - Executive Secretary - EACO and Eng. Irene Kaggwa - Ag. Executive Director UCC. **Bottom Right:** Sherlin from the ITU conducting BSG training.





### 1.3. Uganda Film Festival at 10 Years

The second quarter of 2023 marked the conclusion of the 10th edition of the Uganda Film Festival, an annual event dedicated to celebrating Ugandan cinema. This gathering attracted a diverse audience, comprising local and international film enthusiasts, with over **2,000** attendees, including filmmakers, actors, producers, and cinema aficionados. The festival recognized excellence in filmmaking, bestowing honors in 24 distinct movie categories to more than 120 participating filmmakers and 308 movie entries.



*Above: Eng. Irene Kaggwa - Ag ED UCC (right), receives the chief guest Rt. Hon Thomas Tayebwa - Deputy Speaker of the Parliament of Uganda (centre)*

*Courtesy: Min. of ICT&NG*



*Above (L-R): Mariam Ndagire receives her Lifetime Achievement Award handed over by Julianne R. Mweheire - Director Industry Affairs and Content Development UCC (right, back)*

*Courtesy: Twitter*



*Above: Rt. Hon Thomas Tayebwa gives his speech on the future of the creative industry*

*Courtesy: Twitter*



The festival, held in June 2023, was the culmination of a series of preparatory activities throughout May, including:



Regional short film competitions in Gulu, Mbale, Mbarara, and Masaka.



Capacity-building initiatives, knowledge-sharing sessions, and skills development at UICT Nakawa.



Film clinics on acting techniques and film marketing and distribution, a business of film masterclass, a director's techniques workshop, and a women in film forum enriched the program.

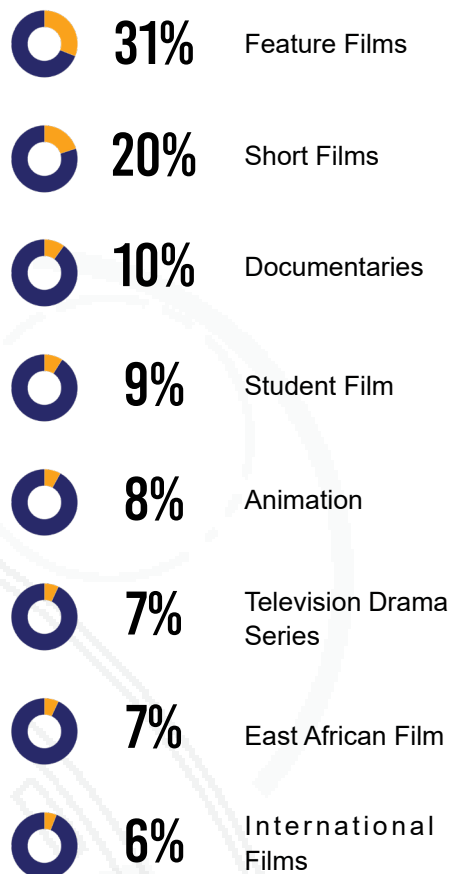


A series of movie screenings CineMax, Metroplex Mall, Arena Mall, and Acacia Mall from May 22 to June 1, 2023.





The 2023 edition of the festival attracted an impressive **308 movie entries**. These submissions spanned a variety of genres, with **24 category winners** receiving recognition. The breakdown of submissions by genre is as follows:



Above: Tracy Kababito wins an for Best Lead Actress in Feature Film (Mukisa).

Courtesy: ChimpReports



Above: Mulima Ashraf (Centre) - Director Ashman Films wins an award for the Best Animation (LOST).

Courtesy: Twitter



Left (L-R): First Daughters: Natasha M. Karugire and Diana M. Kamuntu were in attendance



Below (L-R): Dr. Aminah Zawedde - P.S Ministry of ICT&NG shares a candid moment with Dr. Ruhakana Rugunda - former Prime Minister; current Special Envoy for Special Duties, Office of the President





Above: Nana Kagga receives her award for The Best Production Design of "MUKISA".

Courtesy: Twitter



Above: Amon Nuwamanya receives his award for The Best Actor in a TV Drama

Courtesy: Twitter

#### 1.4. The 13th Edition Of The Consumer Parliament Concludes

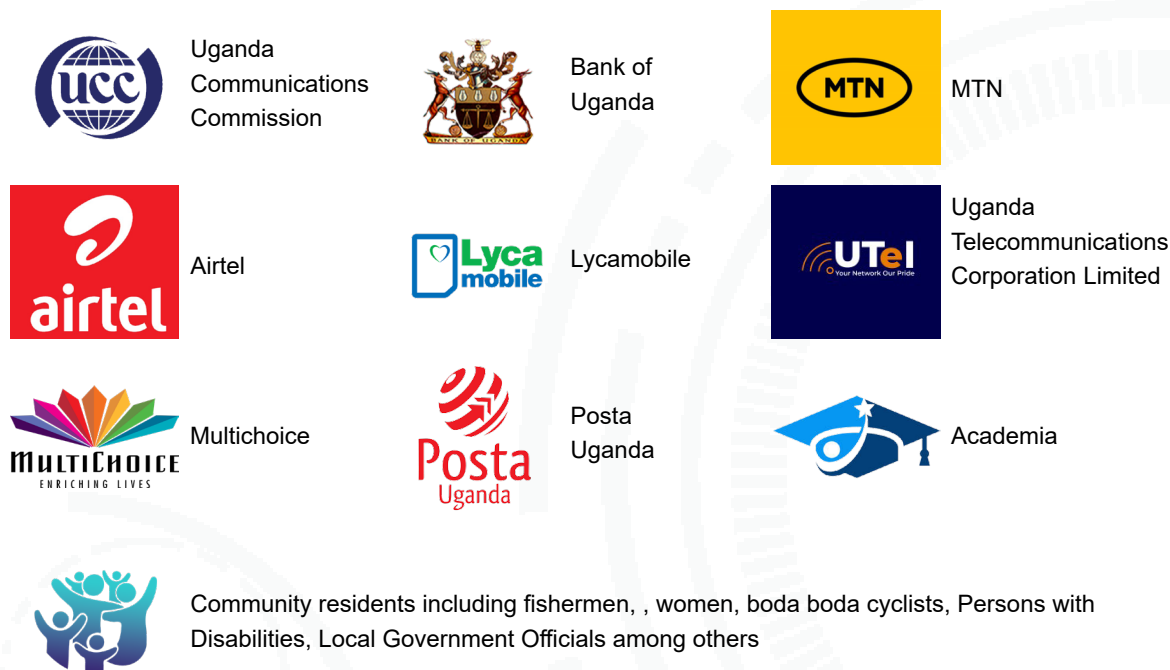
The quarter ending June 2023 saw the conclusion of the 13th Communications Consumer Parliament (CCP-13) that was held in Kamuli. The event that was preceded by week-long consumer empowerment activities in the Busoga sub-region conducted in the districts of Kamuli, Iganga, Luuka and Jinja included consumer health camps, a youth in ICT seminar, a cybersecurity challenge, and radio talk-shows, with an audience of **200 people** and a total reach of **10,000 people** across the 9 days.

The CCP and associated consumer empowerment activities are geared towards the delivery of consumer education on fraud, device verification, and consumer self-help tips; strengthening dialogue between consumers, service providers and regulators; and addressing consumer issues arising from UCC's feedback channels (surveys, outreach activity reports, call centre). This initiative seeks to facilitate multi-stakeholder engagement by bringing together regulators, service providers and consumers to discuss pressing communication issues.



The event was presided over by Rt. Hon. First Deputy Prime Minister, Rebecca Kadaga (Sitted, Centre) with Eng. Irene Kaggwa - Ag ED UCC (on her right) and Eng. Dr. Dorothy Okello - Board Chair UCC (on her left) with an audience of 200 people and a total reach of **10,000 people**.

CCP-13 was a multi sectoral engagement including:



### 1.5. UCUSAF Extend UCC's Digital Skilling Initiative

In the quarter ending June 2023, UCUSAF undertook digital literacy skilling for women in underserved communities. This was done in partnership with Women in Technology Uganda (WITU). The goal of this ongoing project is to close the gender gap in ICT and contribute to the attainment of the UN Sustainable Development Goals 2030.

The project aims to impart basic digital skills on 3,000 women in the informal sector across the 20 priority districts, with **at least 150 women trained in each district**. As of June 2023, digital skills enhancements have been conducted in all the 20 districts with a total of **3,271** women beneficiaries.

In addition, UCUSAF in conjunction with the Federation of Small and Medium-sized Enterprises Uganda undertook a series of week-long trainings targeting micro, small and medium-sized enterprises in Kanungu and Moroto districts. The training targeted informal small business owners in specific sectors (tailoring, welding, motor vehicle mechanics, hairdressing etc). The training exercise equipped **1,130 people** with ICT skills in Moroto, Iganga, Tororo and Kanungu.



Above: Digital literacy training for women and girls in Iganga.



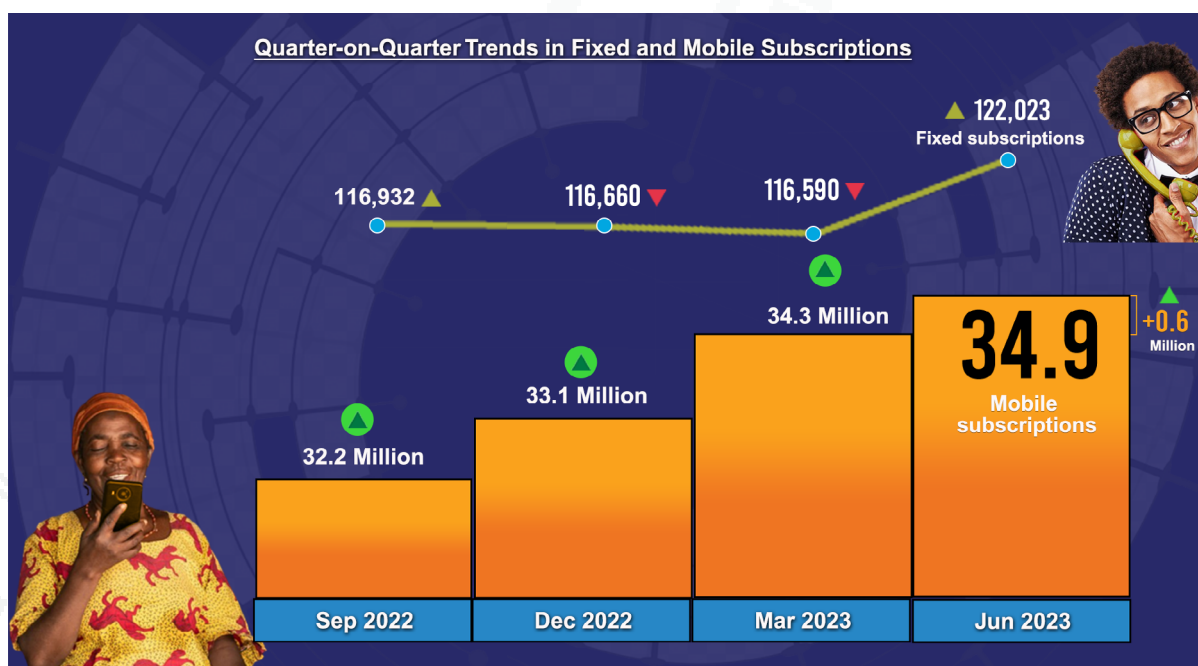
# Service Access and Subscriptions



## 2.1. Telephone Subscriptions

In the months April to June 2023, fixed and mobile subscriptions grew by **600,000 new subscriptions**. This brings the total number of telephone subscriptions to **34.9 million** at the end of June 2023, from 34.3 million in March 2023.

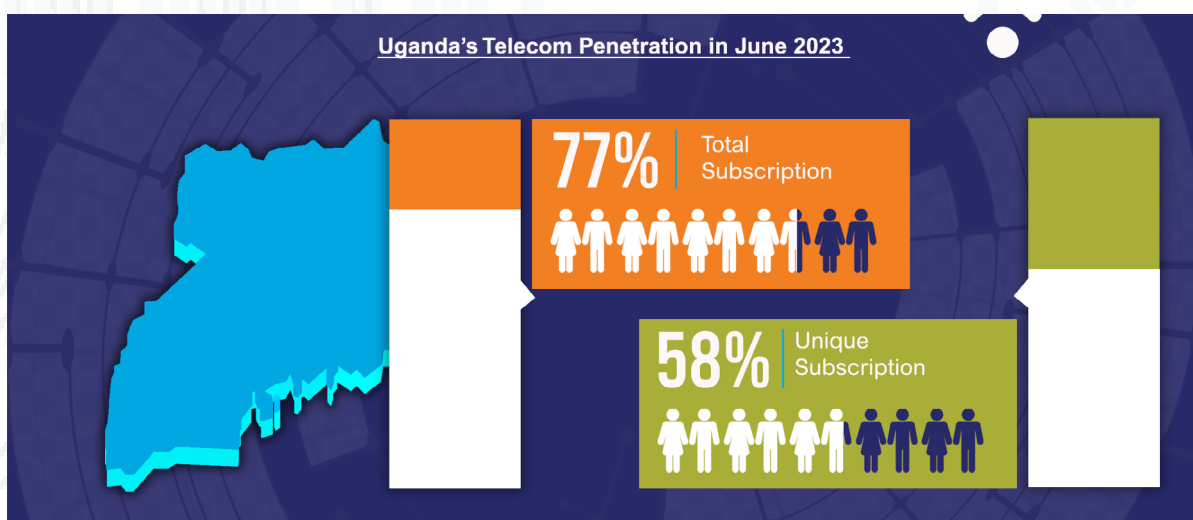
This growth is predominantly mobile telephone subscriptions that accounted for 595,000 new subscriptions.



### Unique Mobile Subscriptions

In terms of unique service access, the count of unique SIM subscriptions stands at **13.3 million**. This leads to a national ratio of National Identity Number (NIN) Card per subscription to 1:3, this means that each national ID is attached to 3 SIM cards.

The growth in subscriptions translates into a national telephone penetration of **77 lines for every 100 Ugandans**. In unique SIM count terms, the penetration comes down to 58 lines for every 100 Ugandans for the ages above 15 years of age from the latest population estimate from the Uganda Bureau of Statistics (UBOS).



*NB: This is based on the number of GSM subscriptions/total population.*



Consistent with the performance of the last 3 years, 2Q22 saw the biggest jump in year-on-year additions in fixed and mobile telephony. The telephone subscriptions count has grown by 3.5 million new connections since June 2022.

## 2.2. Devices and Terminals

In the 3 months ending June 2023, the market posted a total of **40 million gadgets** on the network. This is a 3% in comparison to the 39 million that were posted in 1Q23. Of the **1 million new device additions**, 634,000 were smart, 58,000 were basic gadgets whereas 383,000 were feature phones.

The growth in smart phones could be attributed to the affordability and accessibility of smartphones compared to other internet-enabled devices. Furthermore, active 90-day mobile internet subscriptions account for 94% of the 13.3million smart phones on the network at the end of June 2023.

The market reflects a growing mobile internet dependency as well as an environment conducive to the delivery and adoption of various digital services, such as mobile apps, online transactions, and content consumption.



**Basic Mobile Phone**  
Can make calls and send text messages

### Monthly Users

June 2023	1.9M
Mar 2023	1.9M
Dec 2022	2M
Sep 2022	2M



### Feature Phones

Can make and receive calls, send text messages and provide some of the advanced features found on a smartphone such as social media access and browsing.

### Monthly Users

June 2023	25M
Mar 2023	24.6M
Dec 2022	23.8M
Sep 2022	23.7M



### Smartphones

A class of mobile phones and of multi-purpose mobile computing devices. They are distinguished from feature phones by their stronger hardware capabilities and extensive mobile operating systems, which facilitate wider software, internet (including web browsing over mobile broadband), and multimedia functionality (including music, video, cameras, and gaming), alongside core phone functions such as voice calls and text messaging.

### Monthly Users

June 2023	13.3M
Mar 2023	12.7M
Dec 2022	12.2M
Sep 2022	11.4M

The prevailing smartphone adoption trends underscore the popularity of these devices, even in the face of a substantial 49% tax burden. Engaging in discussions aimed at revising downward the existing tax policies on these devices becomes imperative. The revisions hold the potential to narrow ICT access disparities, fostering increased adoption and utilization of ICT services.

By doing so, not only can this contribute to elevated government revenue through enhanced ICT usage, but it may also mitigate the current revenue losses attributed to the high tax imposed on handsets. This strategic approach aligns with the dual objectives of enhancing digital inclusion and optimizing fiscal considerations in the telecommunications sector.

## 2.3. Internet Subscriptions

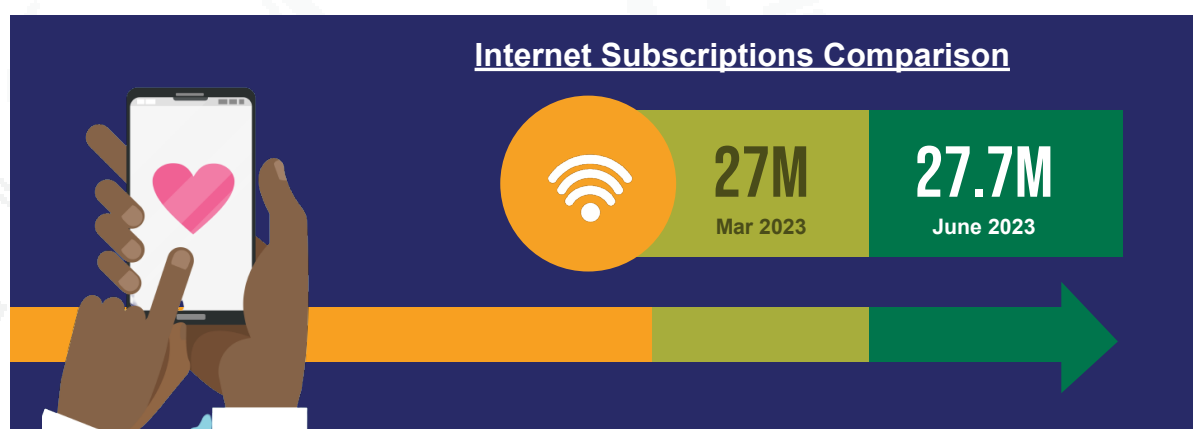
### Active 90 Day Mobile Internet Subscriptions

In the three months ending June 2023, the market witnessed a 6% surge in active 90-day mobile internet subscriptions, reaching **12.5 million** from 11.8 million at the end of March 2023. This indicates that mobile internet is the primary driver, constituting 45 out of every 100 internet connections with a minimum of 90 days of activity.

In aggregate terms, this elevates the total internet connections to **27.7 million** subscriptions, up from 27 million in March 2023. In terms of penetration, the 27.7 million internet subscriptions result in an internet national penetration rate of 61 connections for every 100 Ugandans.

The predominant force fuelling internet adoption in the country remains the proliferation of smartphones, accounting for 99% of the total new connections across both mobile phones and other mobile internet devices.

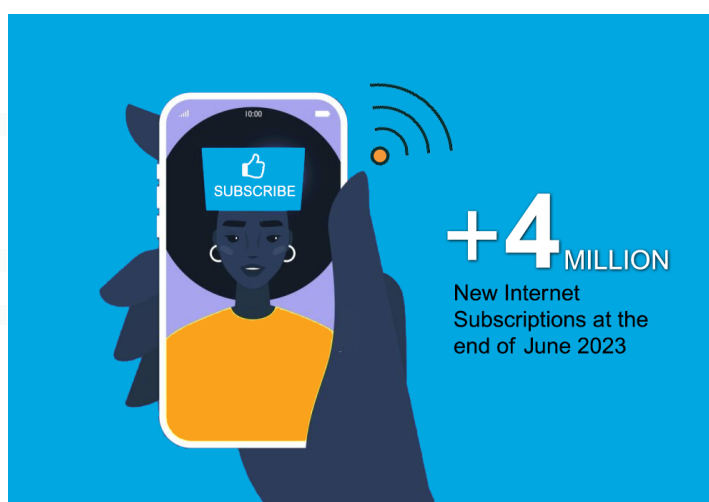
On a year-on-year comparison, the twelve months ending June 2023 saw an increase of 4 million new internet subscriptions from 23.7 million in 1Q22, marking the highest year-on-year growth at 17% in internet subscriptions..



*NB: These numbers are based on the total number of subscriptions that use above 5MBs of data a month.*

Smartphone proliferation continues to be the main driver of internet adoption in the country with 99% of the total new connections attached to both mobile phones as well as other mobile internet devices.

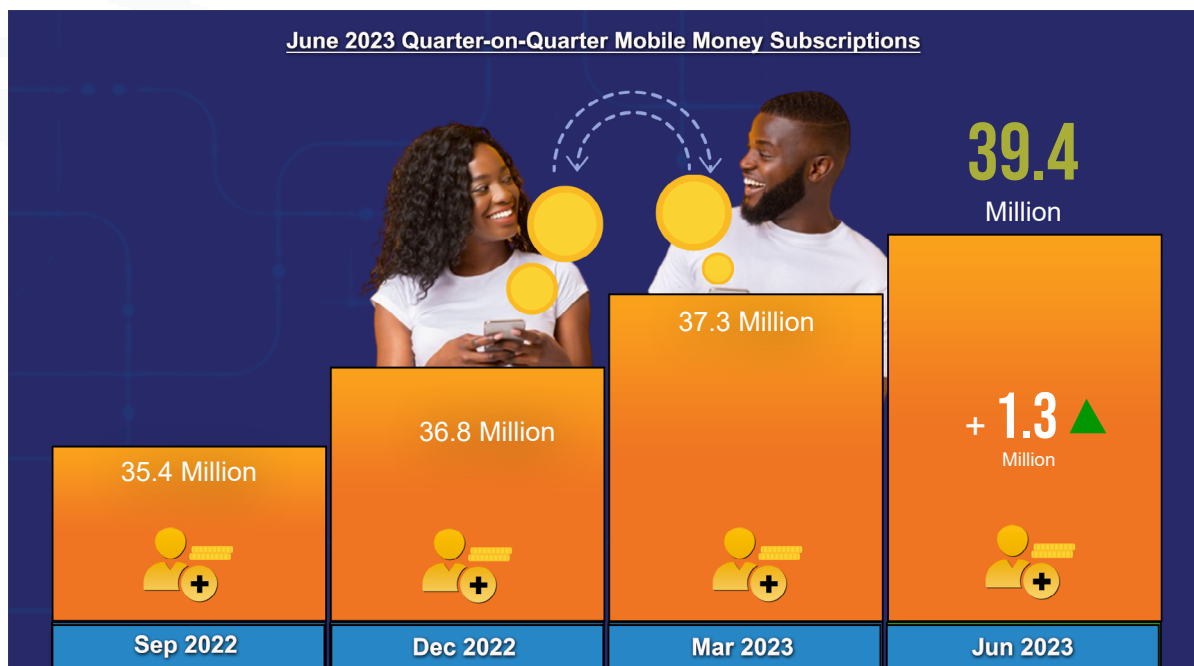
On a year-on-year comparison, the twelve months that ended June 2023 recorded **4 million new internet subscriptions** from 23.7 million in 1Q22. This presents the highest yet year-on year growth of 17% in internet subscriptions.



## 2.4. Mobile and Electronic Money Subscriptions

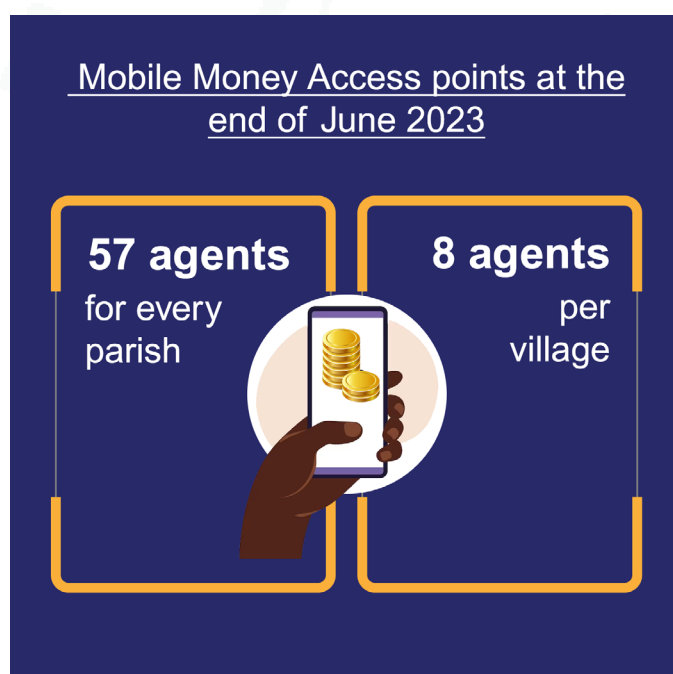
At the end of June 2023, the number of registered mobile money accounts had risen to **39.4 million** from 38.1 million at the end of March 2023. This is a net addition of 1.3 million new registered mobile money accounts in the 3 months April to June 2023.





In mobile money activity terms, the 90-day active accounts have grown by **265,000** accounts. The active 90-day accounts stand at 26.5 million accounts as of June 2023. Relatedly, the number of mobile money access points has grown by 132,000 new points in the months April to June 2023. This translates into an agent activity ratio of **57 agents for every parish**, and **8 agents per village**.

The expansion of mobile money agents can be attributed, in part, to the rising trend of incorporating mobile money services into the operations of bank agents who were previously operating independently. These agents now serve dual roles, acting as both traditional bank representatives and mobile money service providers.



On a year-on-year comparison, a total of **4.7 million** new mobile money accounts were registered in the 12 months ended June 2023. The number of mobile money accounts translates into a national penetration of 8 mobile money accounts for every 10 Ugandans.

# Traffic and Usage





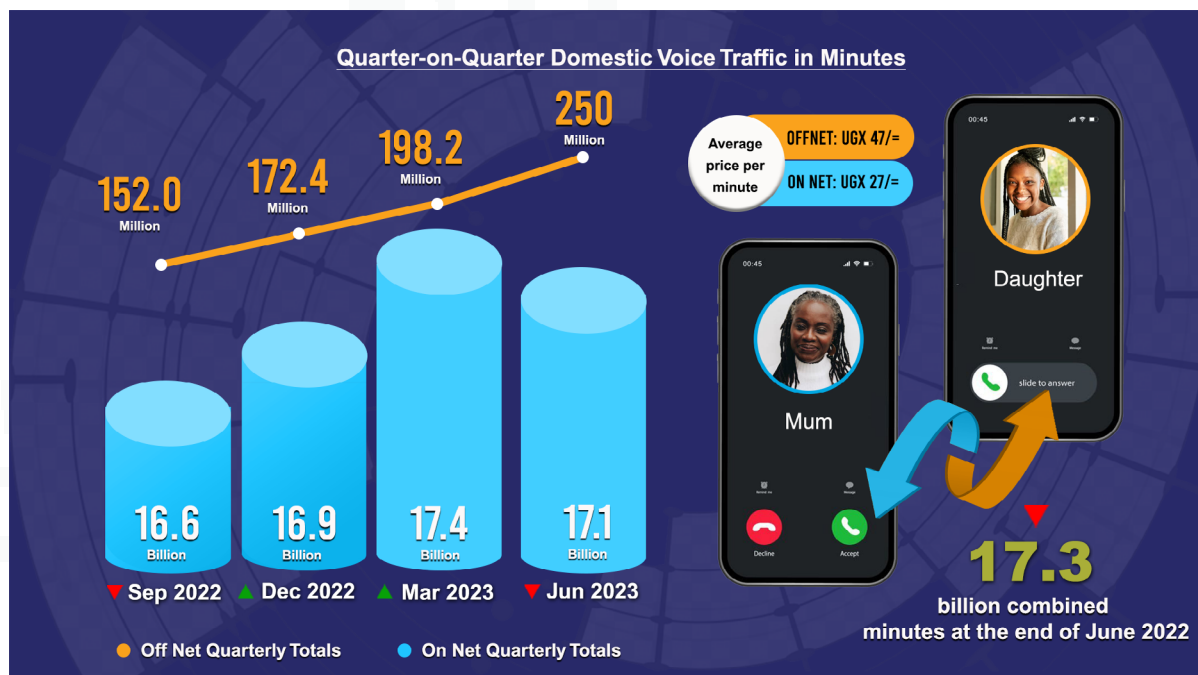
### 3.1. Domestic Voice Traffic

17.3 billion minutes of domestic traffic were posted in the three months April to June 2023. This is a combination of both on-net and off-net domestic traffic in the country.

In the offnet minute segment, the industry posted a record 251 million minutes of talk time which is a 27% spike in voice traffic exchanges between different operators. This is against the backdrop of the 198 million minutes that was recorded at the end of March 2023.

The surge in offnet traffic emerges from the disincentive to switch to other network SIM cards due to the existence of all net bundles.

In network-to-network voice traffic terms, the industry maintained a total of 17 billion minutes of domestic talk time in comparison to March 2023.



On a year-on-year comparison, the offnet domestic traffic has grown 1.7 times with a jump of 107 million minutes in traffic growth between June 2022 and June 2023. In percentage terms, this represents a 75% growth in domestic traffic between the two quarters.

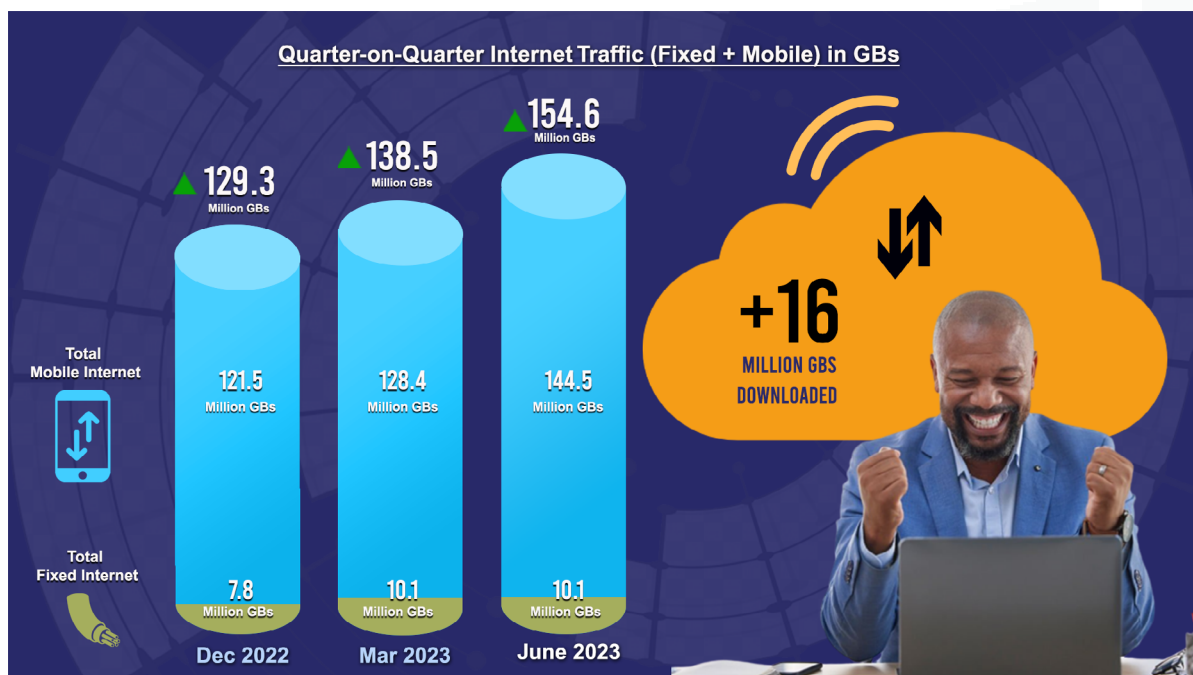
This is 3 times more than the growth observed in the on-net domestic talk time of only 6% observed between June 2022 and June 2023.

### 3.2. Internet Traffic

In the period April to June 2023, the sector recorded total internet traffic of **154.6 billion GBs** (downloaded or uploaded) from the internet. This is a 16 billion GBs growth from the 138.5 billion GBs posted in 1Q23. This is 12% quarter on quarter traffic growth from the 7% growth as compared to the previous period.

Mobile internet traffic posted a 13% growth with a quarter end count of **144.5 billion GBs** in comparison to the 128.4 billion GBs that was posted in the previous quarter. The continued adoption of affordable and non-expiry data bundles in the industry contribute to this growth. In the fixed internet traffic segment, the market maintained a quarterly growth of 10 billion GBs.

In year-on-year comparisons, mobile internet constitutes a substantial 95% of the observed growth in internet traffic. During the three months ending June 2023, mobile internet traffic surged by 47 million GBs, significantly outpacing the 2.5 million GBs growth observed in fixed internet traffic compared to the same quarter in June 2022.



### 3.2. One Network Area Voice Traffic

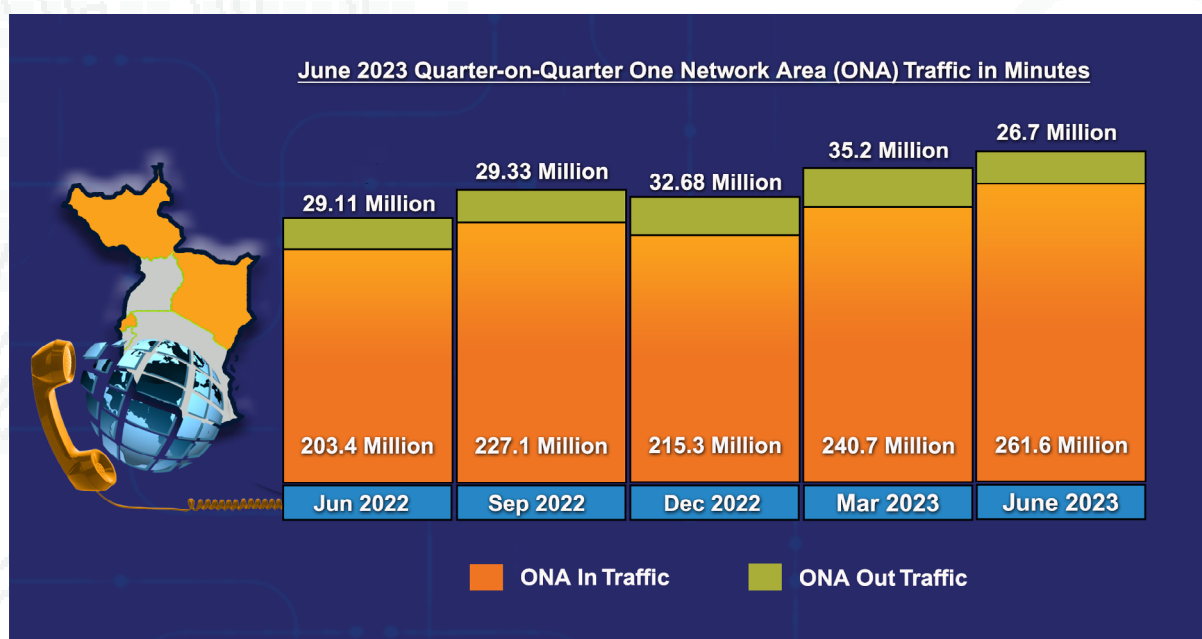
The period 2Q23 posted 288 million minutes of total One Network Area (ONA) voice traffic.

In ONA incoming voice traffic terms, the sector posted a count of **261.6 million minutes**, with a net positive increase of 9% in comparison to the 240.7 million minutes at the end of the quarter ending March 2023. The increase in traffic is attributed to organic growth associated with business movements specifically in the ONA partnership states of Kenya, Rwanda and South Sudan.

Worth noting is the fact that while ONA incoming traffic rose by 20.9 million minutes in the quarter, total international incoming traffic dipped by 8.5 million minutes during the same period. Uganda remains an ONA net traffic receiver as incoming ONA traffic is now 10 times more than outgoing ONA traffic.

ONA outgoing traffic shrunk from 35.2 million minutes in March 2023 to 26.7 million minutes in June 2023. This represents a 24% drop.

In comparison to the quarter ending June 2022, total ONA traffic has grown from 232.5 million minutes to a tune of 288 million at the end of June 2023. This is a 24% increase in ONA voice traffic.





### 3.3. International Voice Traffic

In the quarter under review, the international incoming voice traffic segment dipped with a total quarterly count of **18.5 million minutes**. A net drop of 944,000 minutes was recorded in the three months ending June 2023, from the 19.4 million minutes of incoming international talk time recorded at the end of the three months ending March 2023.

In International outgoing voice traffic terms, the sector posted a 1.7 million voice traffic dip from the 10.3 million minutes observed in international outgoing voice traffic in 1Q23 to the **8.6 million** recorded at the quarter ending June 2023.

The decline in international voice traffic during the June quarter might be influenced by seasonal factors, with individuals tending to travel more internationally in the summer, potentially resulting in fewer international calls. The decrease in international voice calls could be linked to the price elasticity related to the expenses of international roaming charges, encouraging individuals to opt for VoIP (Voice-over-Internet-Protocol) calls through platforms like WhatsApp.



### 3.4. Mobile Money Transactions

By the end of June 2023, the industry recorded 1.62 billion mobile money transactions, up from 1.44 billion transactions at the end of March 2023. This represents a 13% quarter on quarter growth, the first double digit growth in the industry since October 2021.

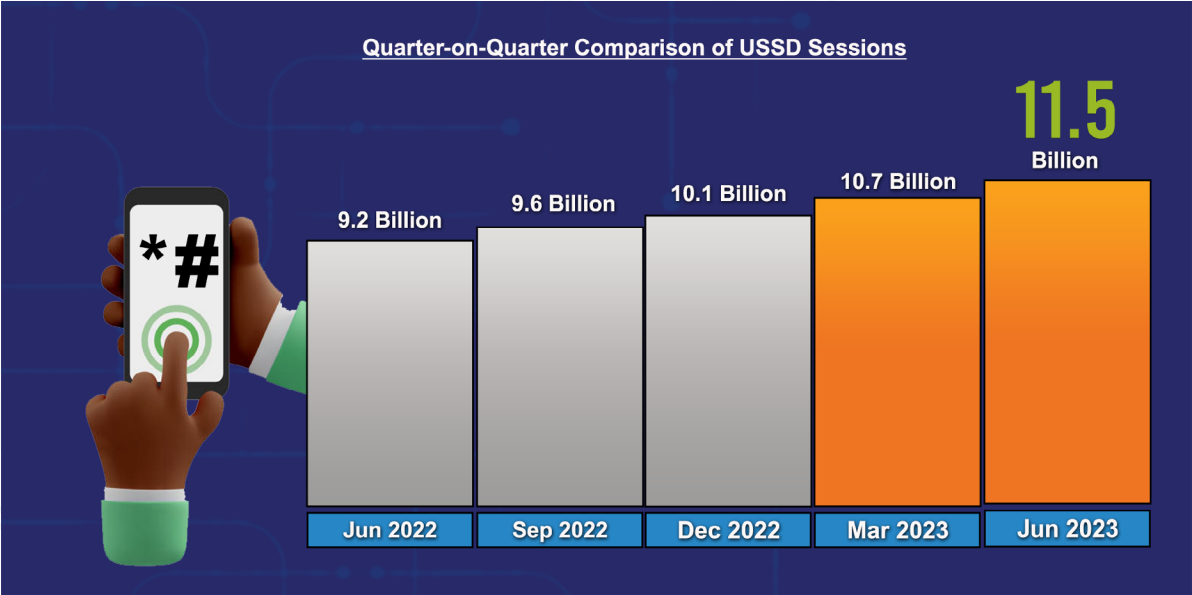
The growth in mobile money transactions could be attributed to the spike in service payments such as school fees associated with the resumption of the schooling term particularly in the months of May - June 2023 as well as Person to Person transactions like Person (P2P) transfers, utility and merchant payments.



### 3.5. USSD Traffic

On the back of strong performance of the mobile financial service business, the sector posted **11.5 billion sessions** by the end of June 2023, from 10.7 billion sessions by the end of the three months ending March 2023. This is growth by a factor of 15%.

The total number of sessions averaged 3.8 billion per month during the quarter. The quarterly peak was realised in May 2023 with a total of 4.1 billion USSD sessions. In year-on-year terms, the industry recorded a 24% growth in sessions from the 9.3 billion sessions in the quarter ending 2022.





# Financial Performance

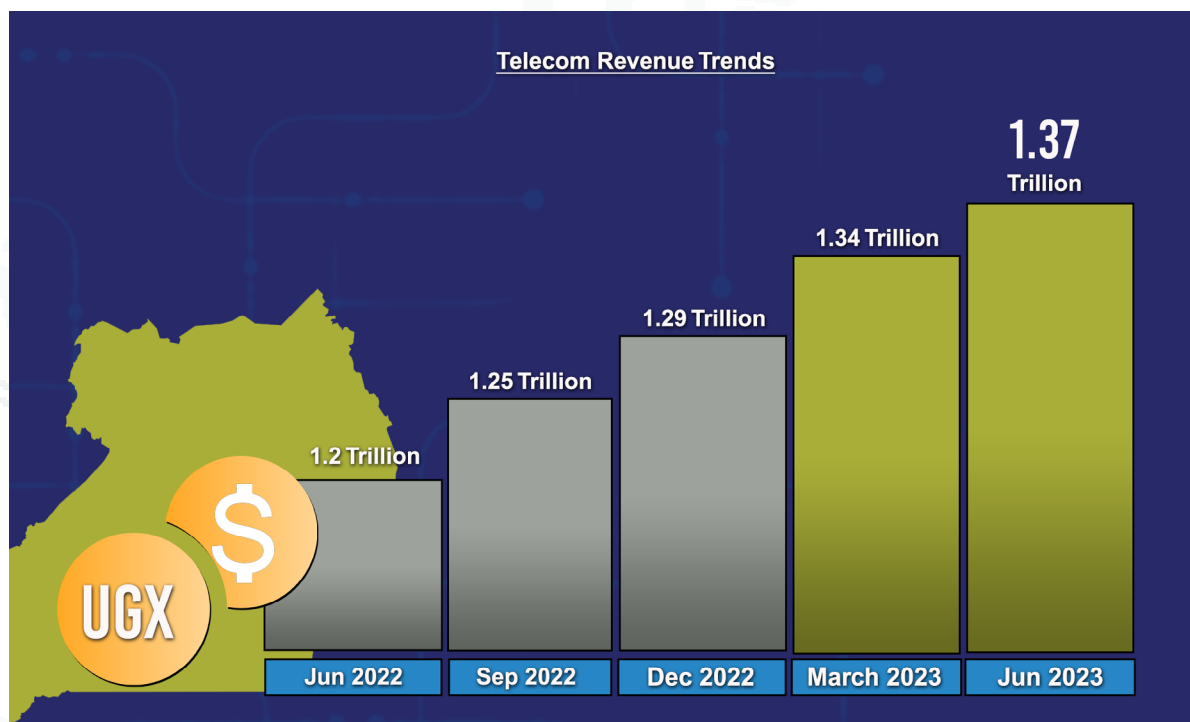


## 4.1 Telecom Sector Revenue

In the 3 months ending June 2023, the industry posted **UGX 1.37 trillion** in comparison to the UGX 1.34 trillion that was posted at the end of March 2023.

In service segment terms, the growth is largely driven by mobile voice services which account for 35% of the growth followed by data services at 24% and tower lease at 17%. Other services such as retail and input/wholesale revenues like International Bandwidth, Value Added Services account for 24% of the growth. It is worth noting that this growth does not include Mobile Money Services.

Since the start of the year, the industry has grossed UGX 1 trillion revenues. In year-on-year quarterly performance terms, the industry has grown by 15% from UGX 1.2 trillion in 2Q22 to UGX 1.37 trillion in the three months ending June 2023.



*Data from licensee unaudited management accounts,  
USD - UGX Rate Conversion from Bank of Uganda*



# Post and Courier Sector Highlights



## 5.1 Uganda Post Ltd (UPL) unveils affordable stamps

During the last quarter, UPL introduced a new initiative aimed at assisting Ugandans living abroad in sending remittances to their families in Uganda. This program involves the introduction of cost-effective stamps, with prices ranging from UGX 2,000 to UGX 10,000.

This innovative approach benefits Ugandans residing in rural areas by providing them with quick and affordable access to their remittances, costing only 3% of the total remittance amount. This move serves to promote financial inclusion, particularly among rural and marginalized communities.



**Left:** Julianne R. Mweheire (centre) - Director Industry Affairs and Content Development UCC was welcomed by James Arrinaitwe - Managing Director UPL (second from left) at the launch on June 29th 2023. **Right:** Some of the stamps launched..

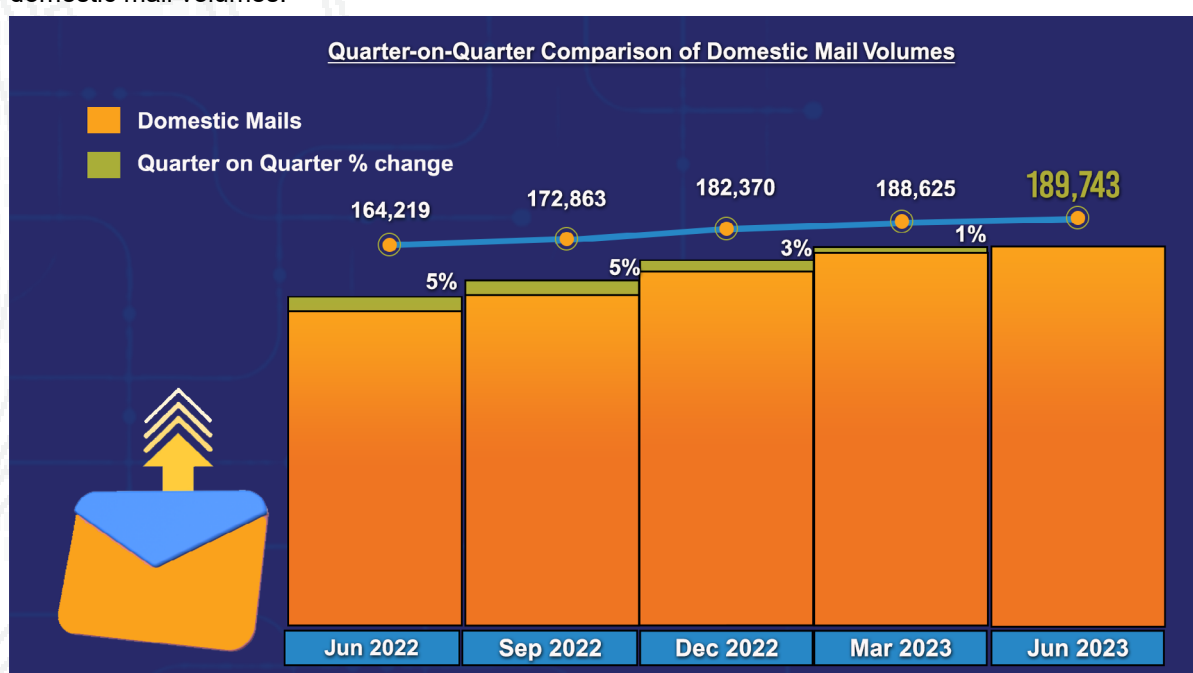
Courtesy: [tndnewsuganda](https://www.tndnewsuganda.com)

## 5.2 Post and Courier Traffic

### 5.2.1. Domestic mail volumes

In the quarter ending June 2023, the domestic mail volumes experienced a 1% increase, rising to **189,743 mails** compared to the previous quarter's 188,625 mails ending in March 2023. This growth was primarily driven by enhanced licensing and reporting compliance.

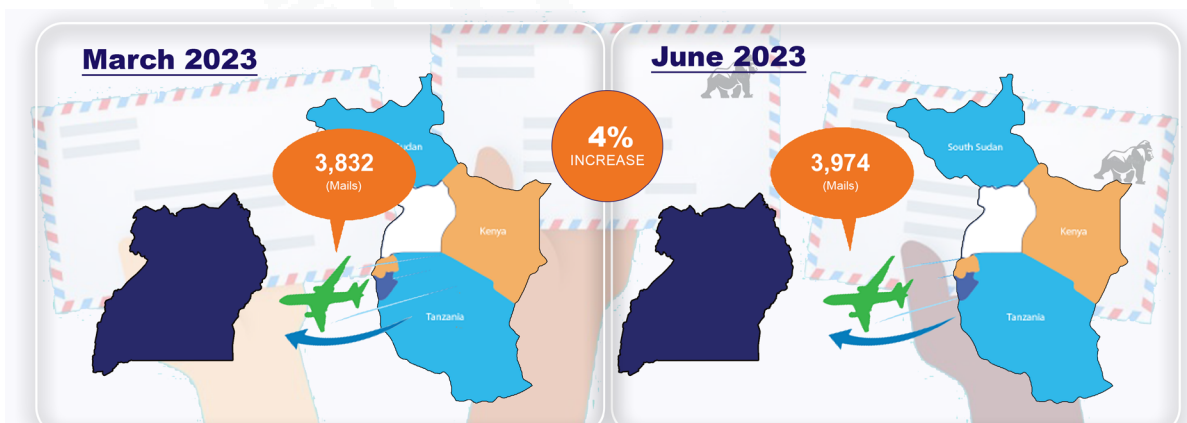
Further, the entrance of new licensees into the courier market, responding to the heightened demand for door-to-door delivery services by domestic e-commerce businesses, played a pivotal role in boosting domestic mail volumes.



### 5.2.2. East Africa In-bound mail volumes

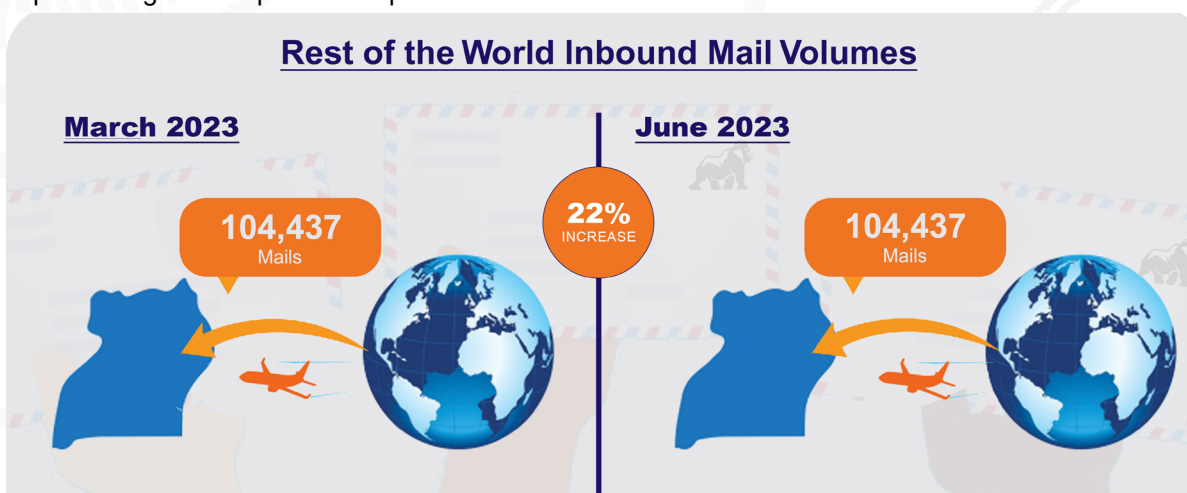
During the three months spanning April to June 2023, the post and courier market witnessed an upsurge in mail volumes received from East African countries such as Kenya, Rwanda, Tanzania, Burundi, and South Sudan.

In particular, inbound mail volumes from East Africa surged by 4% quarter-on-quarter, reaching 3,974 mails by the close of June 2023, compared to the 3,832 mails in the preceding quarter ending March 2023.



### 5.2.3. Rest of the world inbound Mail volumes

Similar to the E.A mail traffic, the volume of incoming mails to Uganda from other parts of the world showed substantial growth, rising to **127,532 mails** in June 2023 from 104,437 mails in March 2023, representing a 22% quarter-on-quarter increase.



### 5.2.3. Rest of the world Outbound Mail volumes

In the quarter ending June 2023, mails sent from Uganda to other parts of the world also saw a marginal growth, reaching **88,215** in June 2023 mails from 87,104 mails in March 2023, translating into a 1% quarter-on-quarter growth.





## 5.4 Expedited Mail Service (EMS) In- bound mail volumes

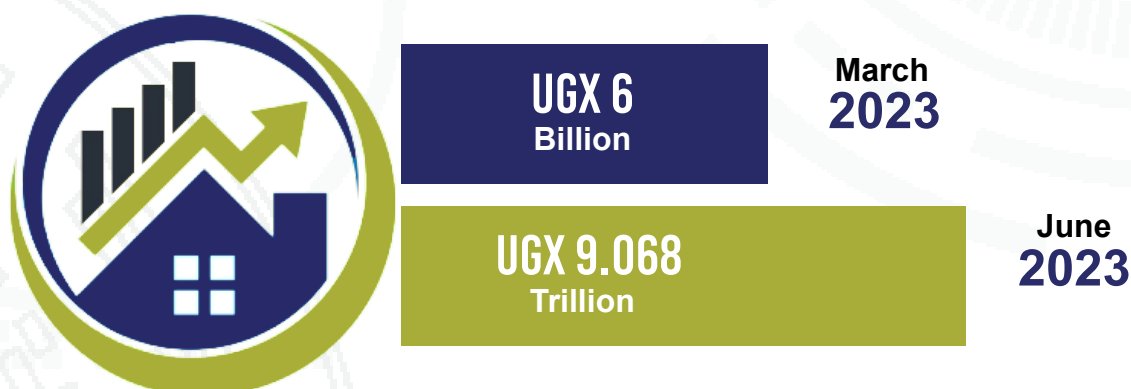
In the three months from April to June 2023, EMS Inbound International Mail Volumes increased to **1,741 mails**, up from 1,546 mails dispatched from Uganda, marking a 13% quarter-on-quarter growth.



## 5.5 Post & Courier Financial Performance

In reference to Post & Courier Revenues, as of the conclusion of the three-month period ending in June 2023, the Post & Courier market recorded a total revenue of UGX 9.068 billion.

This notable growth can be primarily attributed to the introduction of new courier operations in the market, in addition to enhanced regulatory reporting for established businesses within the sector.

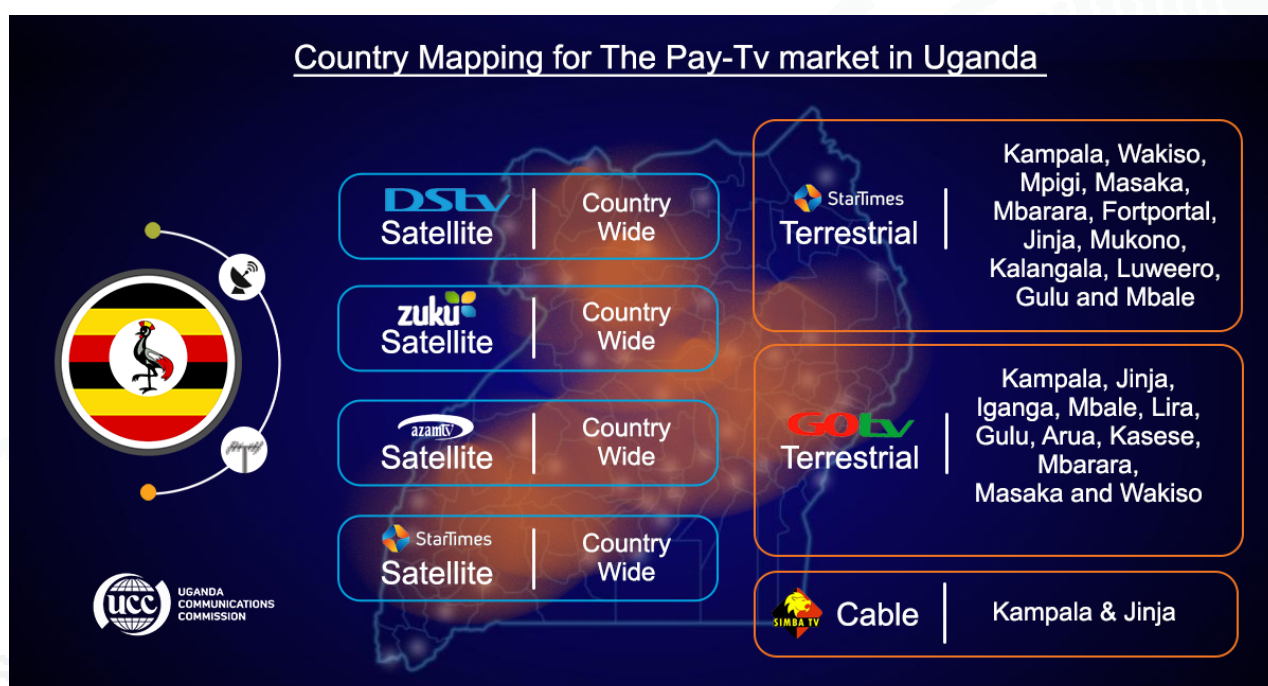


# Broadcast and Multimedia



## 6.1. Pay TV Coverage

The Pay-TV market in Uganda is served by a combination of Satellite, Cable and Digital Terrestrial networks, with 7 licensed content aggregators.



*NB: At least 39% of Ugandans have access to a Television according to Ipsos' National Measurement Research Report*

### 6.1.2 Active Pay TV Subscriptions

Between March 2023 and June 2023, the total count of active pay TV subscribers decreased from 2.4 million to **1.6 million**. This retention in subscription numbers underscores the crucial role of international sports content among Ugandan subscribers such as the English Football premier league.

It's noteworthy that the observed decline in subscriptions prompted content broadcasters to introduce new product offerings and discounted packages in response to evolving subscriber preferences.

**1.6 Million**  
pay TV  
subscribers  
as of June  
2023

## 6.2. Bouquets and Pricing

### 6.2.1 Value Bouquet Prices as of June 2023

In June 2023, the Pay TV market realized a 10% average price increase of their most affordable packages. Multichoice Uganda attributed the 7% increment in their "DSTV Lumba" and "GOTV Lite" packages to the economic outlook. Zuku TV and Azam TV recorded a 30% increase in their "Zuku Smart" and "Azam Pure" lowest priced bundles.

Value Bouquet Prices				
Station	Bouquet	Mar Price (UGX)	Jun Price (UGX)	Channels
<b>DSTV</b>	Lumba	15,000	16,000	Over 50
<b>SitiCable</b>	Ugandan	15,000	15,000	80
<b>Go TV</b>	GoTV Lite	14,000	15,000	Over 10
<b>StarTimes (Satellite)</b>	NOVA	13,500	13,500	31



Value Bouquet Prices				
Station	Bouquet	Mar Price (UGX)	Jun Price (UGX)	Channels
<b>StarTimes (Terrestrial)</b>	NOVA	12,000	12,000	54
<b>Zuku TV</b>	Smart	12,000	16,000	62
<b>Azam TV</b>	Azam Pure	10,000	13,000	68

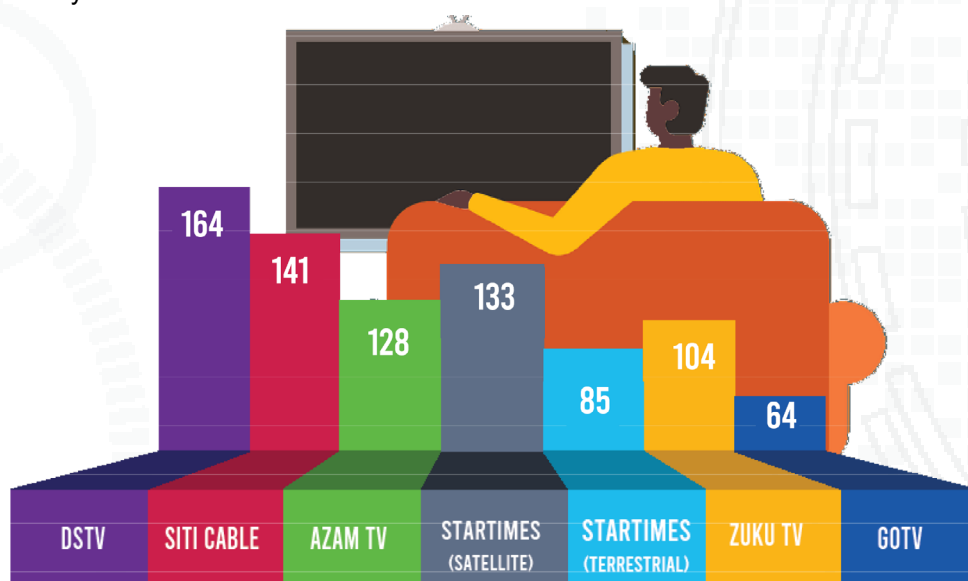
### 6.2.2 Premium Bouquet Prices as of June 2023

The prices of premium bundles averaged a 5% increase; the highest being Startimes Satellite and DSTV that increased by 12% and 8% respectively.

Premium Bouquet Prices				
Station	Bouquet	Mar Price (UGX)	Jun Price (UGX)	Channels
DSTV	Premium	255,000	275,000	140
SitiCable	Asian	85,000	85,000	142
StarTimes (Satellite)	Chinese	54,000	54,000	21
Go TV	GoTv Supa	58,000	65,000	Over 50
Zuku TV	Asian (buy through)	42,700	42,700	57
Azam TV	Azam Play	37,000	37,000	128
StarTimes (Terrestrial)	Classic	28,000	30,000	14

## 6.3. Content

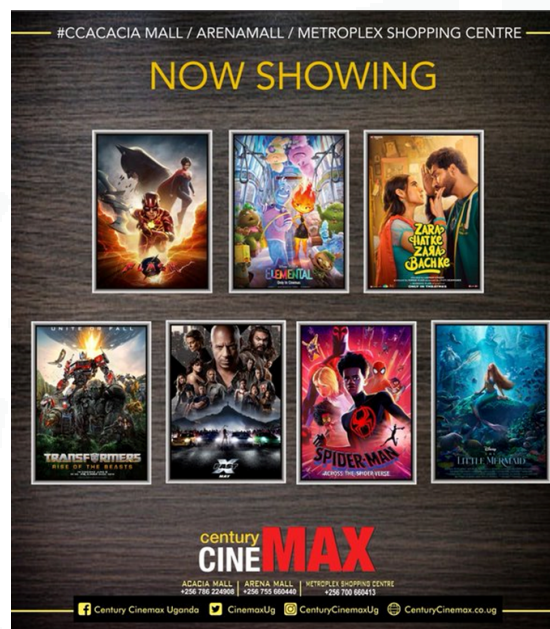
In terms of content, the quarter ending in June 2023 witnessed a wide array of channels being offered by all 7 content aggregators. Among them, DStv posted the highest number of channels at 164, with Kampala Siti Cable and StarTimes following closely behind with a total of 141 and 133 channels respectively.



#### 6.4. Cinema Halls register 7,000 monthly attendees

The film industry experienced a notable resurgence in cinema attendance, reaching a total of **7,395 viewers** by the end of June 2023. Data from the six major cinema halls across the country indicates a strategic response to the competition from digital streaming platforms. This includes the incorporation of advanced technologies such as an all-3D Cinema with multiple screens, an HD Surround Sound System, Dolby Atmos, and 3D triple-beam technology.

The top three films that contributed to this resurgence were “Spiderman Across the Spider-verse” with 1,210 attendees, followed by “Transformers Rise of The Beast” with 1,176, and “The Flash” securing the third spot with 340 attendees.



Ugandan films were not exempt from this positive trend. Over **40 indigenous films** were showcased across three major cinemas for 11 consecutive days, including a special screening of Ntale Mwine’s “Biro” at the National Theatre. In the quarter ending June 2023, a total of 1,692 viewers attended these screenings, demonstrating strong support for the local creatives industry, a collaboration between The Commission and its partners.

Some of the locally screened films at Century Cinema Acacia, Arena Cinemax Nsambya, and Metroplex Cinema Nalya included “Kafacoh,” “Nkwanzzi’s Slip,” “The Kitara Chronicles,” “The Matron,” “Mukisa,” “Enkuba,” and “Sipi.”



#### 6.5. Ugandan Films win big on the international Stage

**Loukman Ali wins Best Director and Best Cinematography at Nigeria’s Africa Magic Viewer’s Choice Awards (AMVCA) 2023**

The AVCMAs are renowned as the most prestigious awards in African film and television, recognizing the continent’s exceptional talent. These awards, involving over 49 countries, have stood as one of Africa’s biggest and oldest film awards. Loukman Ali achieved notable success, clinching the coveted Best Director award for his outstanding work on the 2022 film “Brotherhood” and also securing the Best Cinematography award for the same film.





**Left:** Mathew Nabwiso (first from left) - Actor, Film Producer and Film Director received the award on behalf of Loukman Ali. **Right:** The visuals for “Brotherhood”.

*Courtesy: Africa Magic*

### **Ziwa wins Best Short Film at the Zanzibar International Film Festival (ZIFF) 2023**

“Ziwa,” directed by Samuel Tebandeke, triumphed in the Best Short Film category at the Zanzibar International Film Festival 2023. This year, the festival attracted over 2,700 submissions from across the globe, and Uganda made a notable impact with 51 submissions. Among these, two short films stood out: “A Void Life” by Ian Nyanzi and the eventual winner of the category, “Ziwa.” This success follows Uganda’s previous win in 2021 when Samuel Savior Kizito’s “Catch Out” secured Best Actress for Doreen Mirembe’s outstanding performance in the film.



**Left:** The visuals for “Ziwa”. **Right:** Shamim Mugisha (first from left) received the award on behalf of Samuel Tebandeke.

*Courtesy: Zanzibar International Film Festival*

### **Karamoja, a film funded by UCC wins Best Cinematography in Dallas, USA**

Across the continent, Uganda clinched two prestigious awards at the Pan African Film Festival in Texas, Dallas (USA). “Karamoja” by Eleanor Nabwiso, a film supported by the Uganda Communications Commission through the Content Development Support Program (CDSP 2021/2022), secured the accolade for Best Cinematography. The film’s visuals portrayed the semi-arid plains of Uganda’s Karamoja region. Furthermore, “Crystal-Countless Misfortune,” was honored with the Best Narrative Feature award, further highlighting Uganda’s cinematic excellence on the global stage.



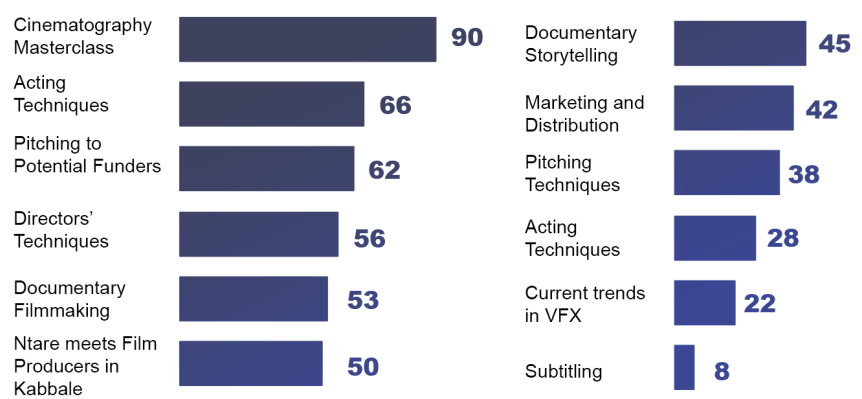
Right: Visuals for “Karamoja” and “Crystal-Countless Misfortune”



### UCC Film and Stakeholder workshops

As part of its commitment to capacity building, the Commission conducted workshops and training sessions in the months of May and June 2023. Over the course of three weeks, a total of **12 workshops** were successfully conducted, attracting **560 applications** for training in Cinematography, Production, Acting, Post-editing, Pitching, and Marketing.





Notably, the Cinematography masterclass garnered the highest number of applicants at 90, followed by Acting Techniques with 66 applicants and Pitching to Potential Funders with 62. This strong response reflects the keen interest and demand for skill development in these specific areas within the creative industry..



### Local Content Production rises

To meet the evolving demands of the dynamic market, broadcasters have exhibited innovation by establishing numerous digital channels, accessible through cable or satellite streaming. Leveraging their strengths, such as extensive reach, trusted brands, and robust industry relationships, broadcasters strategically employ these assets to maximize the utilization of the newly introduced channels.

Since 2020, a noteworthy development has been the creation of **15 distinct TV channels**. These channels serve as a platform for the promotion of local content in Uganda, contributing to the diversification and enrichment of the media landscape.

S/N	Licensed Streaming Broadcasters	Tv Channels	Year of Creation
1.		1. Pearl Magic Prime 2. Pearl Magic 3. TV West 4. Bukedde TV 2	2020
		5. Pearl Magic Loco	2023
2.		1. TV West 2. Bukedde TV 2 3. Face TV 4. StarTimes Go 5. Wan Luo TV 6. Be TV	2020
		7. Sanyuka Prime 8. Makula TV 9. Makula Kika	2023
3.		1. TV East	2020
4.		1. Chamuka TV (formerly Channel U) 2. Bukedde TV 2 3. TV West	2020







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