



MEDIA RESEARCH (8TH WAVE)



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ИССЛЕДОВАНИЯ И КОНСАЛТИНГ

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Acronyms and Definitions

ADR	average daily reach: average number of viewers/listeners viewing a TV channel / TV or listening to the radio station/radio every day
AWR	average weekly reach: average number of viewers viewing a TV channel/TV at least once a week
DTV	digital TV broadcasting
HH	household
KR	Kyrgyz Republic
N	number of people surveyed
Ratings	the share of viewers who watched a particular program / TV channel in a specific time interval or time of day as a percentage of the total population
Share	the share of viewing/listening for a specific TV channel/ radio station at a specific time of the day in the total time of a daily TV viewing / radio listening
TV	television

Introduction

The situation in the media market is constantly changing amid rapidly developing technologies, as well as the influence of a number of external factors that expand the opportunities for obtaining and accessing information. Modern devices become more and more accessible and widespread among the population and open up a wide range of media sources to the user.

Over the last decades, television has undergone significant changes, as well. Every year the number of TV channels increases, the TV audience is offered a variety of genres and a wide range of programs, the television coverage becomes wider, and the signal propagation technology is being improved. The image of television changes in line with the technical development.

However, changes are taking place not only on the television market, but also in other media areas. Every year, the Internet penetration rate in Kyrgyzstan is rising. The world wide web and the new opportunities it offers are becoming more accessible and diverse. Almost everywhere the Internet, along with other media sources, is used for effective business operations and promotion, not only in the private sector, but also in governmental institutions, as well as among various media outlets.

All the changes and improvements in the media market influence the development of existing media trends, which leads to a change in behavior and the media audience itself. The values of the audience, preferences and attitudes to various media directions and media sources change.

In these conditions, media research is important to understand the constantly changing situation in the media market, which is necessary not only for further effective development of its players, but also for more effective management and pricing in the area of advertising.

Understanding the necessity and significance of media research in Kyrgyzstan, especially the need to understand the situation on the television market after the transition of Kyrgyzstan to the DTV, M-Vector Company, the Representative Office of Internews Network in the Kyrgyz Republic, and Soros Foundation Kyrgyzstan initiated the eighth wave of media research at the end of 2017 by the f-t-f public survey method.

Research Objective:

Study of the media market of the Kyrgyz Republic.

Research Tasks:

1. Provide the socio-demographic information about the surveyed population
2. Study the purposes and practice of use of various media (TV, radio, Internet, newspapers)
3. Determine the level of various media penetration/use in Kyrgyzstan and in the regions (TV, radio, Internet, newspapers).
4. Identify the main source of information and preferences of population towards various media, genres on TV
5. Determine the average daily coverage of audience by TV channels and radio stations available in Kyrgyzstan
6. Determine the proportion of viewing/listening to TV channels/radio stations available in the Kyrgyz Republic
7. Analyze changes in prime times of TV channels and radio stations
8. Determine the level of Internet and print media penetration
9. Determine the practice and preferences of population towards Internet and print media

Brief Summary of Research

Socio-demographic profile of respondents

- 2,167 representatives of households with the average number of family members in one household equaling 4 were surveyed.
- The research covered all socio-demographic groups and strata (gender, age, region of residence and type of settlement (city/town/village), occupation, level of education, ethnic background, income, etc.). 50.3% of households had minors who were own children of respondents.
- In the majority of cases, the main language of interaction in a household among the population surveyed was the Kyrgyz (67.6%), whereas the Uzbek (13%) yielded second place to the Russian (16%).
- Among the population surveyed, 34% sought banking services.
- 55% of households have cars; out of them 30% are right hand drive vehicles.
- 15% of population had and used tablet PCs, about 20% used their laptops and PCs, and 38% possessed CD/DVD players.
- Amid rapidly developing communication technologies, despite the fact that television is used by 2/3 of the population of Kyrgyzstan as a main source of information, Internet becomes a more popular source of information and is used by 41% of nationals of the country for this purpose.
- The average level of public trust to the information seen/heard from various media resources is around 6 on a 10-point scale, where 1 point means "do not trust at all", and 10 points mean "fully trust".

Overview of the situation on the television market after the transition of Kyrgyzstan to the digital television

- 97% of the population of the Kyrgyz Republic have a TV at home.
- About 40% of the population of the country have access to 11-30 TV channels. About 50% of the population have access to 31-100 TV channels, and they live mainly in the northern regions of the country.
- The most widespread type of television among the population is the digital terrestrial television (87.5%), which is received via an integrated tuner in 26%, and via a receiver in 74% of cases. In the cities of Bishkek and Osh, the level of access to DTV is lower than the average level in the country, in other regions this level is higher than 87.5%. 79% of urban population and 93% of rural population have access to digital TV. The lower the income of households, the higher is the probability of access to DTV.
- About 59% of those having access to DTV evaluated its quality as high or very high, and 66% of DTV users said that TV channels in the social package met their preferences.
- 4.5% of the population planned to connect to the digital terrestrial television in the next six months, and 8% of the population didn't plan to do it because they used the provider's services of pay TV.
- 9% of the population have alternative types of TV, namely Internet and satellite TV. The people use mainly provider-free satellite dishes, or Internet TV via Aknet Provider to get access to satellite television.
- 65.2% of the population are aware that they can watch TV via a phone/tablet/PC; however, only about 20% of the population of Kyrgyzstan do it. This way of TV viewing is mainly common among the younger generation and among people with higher incomes.
- The most preferable languages of TV viewing are Russian (38%) and Kyrgyz (54%).

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- The most preferable types of TV programs are the news, feature films, and music videos.
- The average daily TV audience, compared to 2016, decreased by 6% and amounts to 69.1% of the whole population of the country. Depending on the region and age structure, this indicator varies from 63% to 80%. OTRK (KTRK) has the biggest average daily audience among TV channels (15%), then goes KTRK Music (11%), and Channel 1 (ORT) (10%).
- The average weekly TV audience is 92.6% of the Kyrgyzstani. The average weekly audience of every TV channel in Kyrgyzstan exceeds the average daily audience more than twofold.
- There was a reduction in the daily television viewing of TV channels that had existed before the transition of the KR to DTV, due to the emergence of new TV channels that already managed to gain significant shares in the overall structure of television viewing. Thus, the share of television viewing of the top 10 channels varies from 3% to 9% in Kyrgyzstan.
- Compared to 2016, the share of people viewing TV in the evening prime time decreased approximately by 8-10%.

Review of the radio market and radio preferences of the population

- In the last 6 months, 76.1% of the population of the republic listened to radio compared to last year's 92.2%. This reduction was most likely due to the growing popularity of TV channels that contain much music, and to the fact that the audience was increasingly shifting to the Internet, forming and listening to their own playlists through various devices.
- Men listen to radio more – 60%, compared to 55% of women. Older people (35-44 year olds) prefer radio, although radio listening decreases almost by one third by the time people reach the retirement age (from 63% to 37%). The main preferable languages of radio listening are Kyrgyz and Russian.
- Respondents often listened to radio via a radio set (82%), and about 17% listened to radio via a mobile phone.
- About 18% of the population listen to online radio. Thus, younger population tends to listen to online radio, and the majority of online radio listeners were Russian speaking people.
- Radio is mainly used to listen to music. The majority of respondents called local performers, pop and retro as their favorite musical directions. The second significant criterion for radio selection by the type of programs is the availability and content of news blocks of radio stations.
- The top three radio stations by the average weekly audience in Kyrgyzstan were: Kyrgyzstan Obondoru, Min Kyial and Europa Plus.
- The top three radio stations by the radio listening share are the same as in AWR – Kyrgyzstan Obondoru, Europa Plus and Min Kyial. However, the subsequent places in the radio listening share differ when compared to the weekly audience size.
- In general, the market can be divided into 4 main peaks (prime time) of radio listening: the first one – the morning prime time: in 2015 it was 11 am, in 2017 it was 12 pm, the

second one – the lunch prime time: from 12 pm in 2015 and from 1 pm to 2 pm in 2017, the third peak in both years – the midday: from 4 pm, and the fourth peak - evening: from 7 pm.

The practice of Internet experience and public preferences

- 59% of the population of Kyrgyzstan use Internet. In northern regions, the share of Internet users is higher than in southern regions (64% and 55%, respectively). In the city of Bishkek, over 80% of residents use Internet.
- 73% of residents use Internet in cities/towns, whereas only 52% use Internet in villages.
- Older people use Internet less frequently than the younger generation.
- Mobile phone is the main device used by people to get access to the Internet. In the cities/towns, about 20% of Internet users use home PCs (cable, phone line), apart from mobile phones, to get access to the Internet. In the villages, 94% of users use mobile phones for this purpose.
- Internet access from home PCs via cable and phone line is very low among Internet users of southern regions. In Batken and Jalal-Abad oblasts, their share is as low as 1%, while 25% of Internet users in the city of Bishkek and 17% in Chui oblast use such type of connection.
- There is a proportional relation between the choice of the device for Internet access and the age of respondents. The older the population, the more often it chooses home PCs (cable, phone line) for Internet access. There's an opposite picture with the younger generation that prefers mobile phones/smartphones for Internet access.
- Internet users that have cable or phone line Internet prefer AkNet Internet Provider (37%), KyrgyzTelecom (20%), and Jet (15%). About 40% of respondents explained their choice for a certain provider by the most affordable cost of service, 25% - by high speed of Internet, and 23% did not have another option.
- Users of USB modems for Internet access prefer O! Internet provider used by 23% of Internet users. 22% of users use AkNet modems.
- The population that gets access to the Internet via laptops and tablet PCs also choose AkNet (26%) and O! (22%) Internet providers.
- The users of mobile Internet services have the following preferences: 1st place O! (47%), 2nd place Beeline (39%), and 3rd place MegaCom (22%).
- In addition to the key reasons of choosing a specified mobile Internet provider, i.e. affordable price and high speed, 20% of mobile Internet users prefer quality connection without failures.
- The main browser used for Internet access is Google Chrome used by 81.5% of all Internet users. The second frequently used browser is Opera used by 15.5% of Internet users.
- More than 81% of Internet users use the Internet every day, 14% use it 2-3 times a week, and the rest use it on rare occasions.
- Internet users use messenger apps frequently (59%), and news websites rarely (29%).
- Among the users of messenger apps, the leader is WhatsApp (96%).
- Users of email websites use Mail.ru in 70%, and Gmail in 22%.
- Among news websites, 19% of their users visit Super.kg most often.
- 22% of respondents that use Internet to search for scientific and educational information use Google Chrome. 38% of users who purchase/sell on the Internet use Lalafo. The

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majority of respondents using Internet for entertainment visit YouTube (58%), and gamers use Playmarket (39%).

- 46% of the population use social media. However, the share of users in the cities/towns is 58%, and only 39% in the villages. In northern regions of the country, the share of social media users varies from 45% to 80%, whereas in southern regions it doesn't exceed 48%.
- The prevailing audience of social media is younger generation. Thus, over 60% of respondents aged 14-35 visit social media. Only 5% of respondents aged 65+ use social media.
- The main reason for using social media is interaction (70%), just over 40% of users read news feeds, and 25% search for the necessary information, including for the purpose of raising the level of their education.
- In general, the total time of one visit of social media is less than 2 hours, 28% of users stay online for less than 30 minutes, 27% - from thirty minutes to one hour, and 29% of users - for 1-2 hours.
- The most visited social media among users of this category of websites are Odnoklassniki (35%), Instagram (23%) and Facebook (13%).

Preferences of the population in print media

- The audience of print media is 49.1% of the whole population of Kyrgyzstan. The share of readers is higher in villages than in cities/towns (49.4% and 43%, respectively).
- The share of people reading print media is higher in northern regions of Kyrgyzstan than in southern ones. The most active audience of print media is the population of Talas oblast, where 69% of people read print media.
- Despite the growing share of Internet users in Kyrgyzstan, the share of readers of online versions of print media is still low - 7%.
- The share of women reading print media, both online and paper versions, is higher than that of men.
- There is a relation between the newspaper reading and the age of respondents, the older the person, the more likely they read print media. The overwhelming majority of the population aged 35+ read newspapers (over 50%). On the contrary, the population aged 35 and below read online versions.
- The leading print media in Kyrgyzstan is Super Info newspaper read by 29% of the population of the country. The next popular media is Vecherniy Bishkek read by 5% of respondents. However, there is a significant audience of local print media in every settlement.
- The most preferable media outlets for city/town residents are Super Info and Vecherniy Bishkek, whereas for rural residents these are Super Info and Daryger.
- Comparing the audiences of the 2 leading newspapers, we can say that the older the reader, the more likely they choose Vecherniy Bishkek. There is an opposite situation with Super Info.
- In general, the paper versions of print media are read by 42% of respondents, out of which 54.5% share them with other persons. The average number of people with whom the respondents share their newspapers is 3.
- The main language of newspapers read by the population is Kyrgyz, 73.8%. Russian publications are read by 23.9% of readers of print media.

Research Methodology

Target audience:

Population of Kyrgyzstan aged 14 and older.

Research geography: Kyrgyzstan
(all oblasts, cities/towns and villages)



Survey time: 30.10-05.11.2017

Research methodology:

The research methodology used to study the situation in the media market, including the collection of necessary information and the calculation of key media indicators (Daily Reach, Weekly Reach, Share, Ratings), was developed together with international experts with vast experience in organizing and conducting social media measurements, as well as in cooperation with leading international companies working in this area, and was audited by them.

This methodology involves the quantitative study with the use of face-to-face survey. This method also involves the one-week-long survey involving equal number of interviews per every day of survey in every region.

The survey was conducted via **tablet PCs**. All interviews were audio recorded, and anyone can listen to audio records of interviews at the office of M-Vector.

To raise the level of accessibility of respondents of different demographic profiles, the survey was conducted in the evening (from 4 pm to 8 pm), when the majority of respondents were at home. The survey of the population took place both on weekdays and on weekends.

The survey was held by experienced interviewers (interviewer profile: women and men over 30, with a degree in sociology, education, psychology) in a language preferred by a respondent: Kyrgyz, Uzbek or Russian.

Each interview lasted for 20-30 minutes.

Survey sample

In order to extrapolate the findings to the sampled population and to obtain statistically reliable data for each region included in the sample of the study, **2,167 respondents** across Kyrgyzstan were interviewed. This sample size allows to obtain statistically reliable data, with the sampling error range at the country level **±2%**, at the regional level - **±6-8%**).

These figures were calculated based on the tolerable sampling error and a confidence interval. The sample size calculating formula by cities/towns is given below:

$$n = \frac{NZ^2P(1-P)}{(N-1)\epsilon^2 + Z^2P(1-P)}$$

where,

N- Population of the oblast

Z- Value of the normal coordinate for the desired level of the confidence factor.

e – Sampling error

P – Probability of getting any proportion when answering the question, $P=0.5$

To determine the sample size in each region, an equal sampling approach was used that implies an approximately equal sample distribution for each cluster and allows to get results with an approximately equal sampling error for all clusters/regions of the research.

For this purpose we used an approach of division of regions into large, medium and small ones, depending on the number of people living therein. For regions within each such group, the sample was determined using the equal sampling method. This method is used in cases where data are important at the level of each region and, accordingly, it is necessary to interview the sufficient number of respondents in every region to obtain statistically significant results. A proportional approach to the sampling in this case will not allow to accomplish this task.

The sampling point size¹ was 10 interviews. The survey sample covered 141 settlements.

Selection of settlements

The selection of settlements was based on the equal three-stage random cluster sampling with the use of **PPS (Proportional Probability Sample)**, which implies the random selection of sampling units with a probability proportional to the size of units in the sampled population. All units may be selected with replacement; clusters may be selected without replacement.

A step-by-step approach to the three-stage random cluster sampling with the use of PPS:

1. Determination of the cluster size (sampling size in every region of Kyrgyzstan), the approximately equal number of interviews in every cluster (equal sampling);
2. Areas are randomly selected in every cluster according to the PPS method;
3. Aiyl aimaks are randomly selected in every selected area (according to the PPS method)
4. Settlements are randomly selected in every selected aiyl aimak (according to the PPS method).

A widely recognized approach was used to select households with the use of routing, with a standard increment $n+3$ for the private sector and $n+5$ for apartment blocks. Respondents in households were selected according to the simplified Kish grid.

The detailed survey sample depending on settlements see in the table below.

¹ A minimum sampling unit. In majority of cases, only one sampling point will be determined in every village, i.e. 10 interviews, in larger villages and towns/cities there will be more sampling points.

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Region	Village/City/Town	Total interviews
City of Bishkek	City of Bishkek	352
City of Osh	City of Osh	257
Batken oblast	City of Batken (including urban settlements)	20
	Town of Kyzyl-Kiya (including villages)	20
	Town of Kadamjai (including villages)	10
	Village of Ak-Tatyr	10
	Village of Min-Chynar	10
	Village of Kara-Bak	10
	Village of Kyzyl-Bel	10
	Village of Chet-Kyzyl	10
	Village of Samarkandyk	10
	Village of Jany-Bak	10
	Village of Pasky-Aryk	10
	Village of Orukzar	10
	Village of Chon-Kara	10
	Village of Kon	10
	Village of Langar	10
	Village of Uch-Korgon	10
	Village of Valakish	10
Village of Tash-Korgon	10	
Jalal-Abad oblast	City of Jalal-Abad (including villages, urban settlements)	20
	Town of Kara-Kul (including villages, urban settlements)	20
	Town of Tash-Kumyr (including villages, urban settlements)	20
	Village of Jon	10
	Village of Karacha	10
	Village of Ala-Buka	10
	Village of Oktyabrskoye	10
	Village of Debey	10
	Village of Jany-Dyikan	10
	Village of Dostuk	10
	Village of Arslanbob	10
	Village of Kara-Suu	10
	Village of Komintern	10
	Village of Kurulush	10
	Village of Kyzyl-Tokoy	10
	Village of Massy	10
	Village of Naryn	10
	Village of Raykomol	10
	Village of Sovetskoye	10
	Village of Tabylgty	10
Village of Top-Jangak	10	
Village of Charbak	10	

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Issyk-Kul oblast	Town of Balykchy (including villages, urban settlements)	30
	City of Karakol (including villages, urban settlements)	35
	Village of Saruu	10
	Village of Ak-Kochkor	10
	Village of Kabak	10
	Village of Kyzyl-Tuu	10
	Village of Konur-Olen	10
	Village of Tert-Kul	10
	Village of Ananyevo	10
	Village of Bokonbayevo	10
	Village of Jeti-Oguz	10
	Village of Karat-Talaa	10
	Village of Oruktu-Khutor	10
	Village of Tamchy	10
	Village of Ton	10
	Village of Chyrpykty	10
	Naryn oblast	City of Naryn
Village of Bash-Kuugandy		10
Village of Kuiruchuk		10
Village of Chayek		10
Village of Bayetovo		12
Village of Kara-Moynok		10
Village of Ortok		10
Village of Kochkorka		10
Village of Tendik		10
Village of Telek		10
Village of Jany-Jol		10
Village of Jan Bulak		10
Village of At-Bashy		10
Village of Debelyu		10
Village of Terek-Suu		10
Village of Kuibyshev		10
Village of Bolshevik		10
Village of Emgekchil	10	
Osh oblast	Town of Kara-Suu	20
	Village of Aravan	10
	Village of Kara-Kulja	10
	Village of Kashgar-Kyshtak	10
	Village of Ken-Say	10
	Village of Jany-Aryk	10
	Village of Kurshab	10
	Village of Kyzyl-Kyshtak	10
	Village of Kyrgyz-Ata	10
	Village of Miyazdy	10
	Village of Nariman	10
	Village of Jany-Nookat	10
Village of Savay	10	

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	Village of Staraya Pokrovka	10
	Village of Tepe-Korgon	10
	Village of Fedorovo	10
	Village of Chogom	10
	Village of Sheraly	11
	Village of Chapaeva	10
	Village of Baryn	10
	Village of Den-Bulak	10
	Village of Ozgeryush	10
	Village of Chimbay	10
	Village of Myrza-Aryk	10
	Village of Karool	10
	Village of Myrza-Ake	10
	Talas oblast	City of Talas
Village of Joon-Debe		10
Village of Jiyde		10
Village of Kara-Buura		10
Village of Kara-Suu		10
Village of Maimak		10
Village of Manas		10
Village of Tash-Aryk		10
Village of Kyzyl-Tuu		10
Village of Jon-Aryk		10
Village of Kek-Tokoy		10
Village of Sheker		10
Village of Kek-Kashat		10
Village of Ak-Jar		10
Village of Talas		10
Village of Kek-Debe		10
Village of Kyzyl-Jyldyz		10
Village of Chon-Kapka		10
Chui oblast	Town of Tokmok	20
	Town of Kara-Balta	20
	Village of Mayevka	10
	Village of Nijnyaya Ala-Archa	10
	Village of Novopokrovka (area)	10
	Village of Petrovka	10
	Village of Seleksionnoye	10
	Village of Tash-Debe	10
	Village of Aral Blijniy	10
	Village of Jal	10
	Village of Kirovskoye	10
	Village of Kyzyl-Tuu	10
	Village of Ivanovka	10
	Village of Krasnaya Rechka	10
	Village of Chuy	10
	Village of Aliaskar Toktonaliev	10
Village of Ak-Suu	10	

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	Village of Vostok	10
	Village of Leninskoye	10
	Village of Jaiyl	10
	Village of Iskra	10
	Total	2167

Data weighing

To ensure that the sample is a representative general population and its design is consistent with the parameters of the country, a weighing procedure by sex, by type of settlement (city/town/village), by age and by region of residence was applied.

This procedure is standard and is used in all sociological studies. It is performed using the statistical SPSS app. The calculating formula for the standard weighting factor is given below:

$$\text{Weight} = \text{Share in general population \%} / \text{Share in sample \%}$$

After this procedure, the sample in question completely repeats the parameters of the general population, i.e. the composition of the country's population aged 14+ by weighting parameters.

Survey tools

The tools for the research were developed by specialists of M-Vector.

The questionnaire for the interview was translated into Kyrgyz and Uzbek, and was programmed for the further survey with tablet PCs.

Also, the Russian, Kyrgyz and Uzbek versions of the questionnaire were tested. To assess the quality of tools, **50 pilot** surveys were held across Kyrgyzstan. Necessary amendments and modifications were made to the questionnaire depending on the results of the pilot survey.

Training of field specialists

The necessary staff of interviewers was used for field works to ensure the timely provision of information:

1. 72 interviewers for the questionnaire survey;
2. 7 supervisors (the number of supervisors involved corresponds to the number of oblasts covered by the research);
3. 12 controllers (check of questionnaires for completion, for interview, listening to audio records for the accuracy of interview, and comparison of respondents' answers with the completed questionnaires);
4. 1 field manager.

Upon the approval of the final version of questionnaires, detailed instructions were given to all field officers (interviewers, controllers and supervisors). The training covered the following topics:

1. Objectives and tasks of the project;
2. Rules of interaction with a respondent;
3. Questionnaire completion rules;
4. Etc.

Quality control

M-Vector specialists monitored field works. Also, the customer could monitor any stage of field works.

Upon completion of all field works, the supervisor in every oblast together with the controllers checked the questionnaires, itinerary lists, maps for completion and accuracy, as well as all completed questionnaires for availability of interviews and audio records.

30% ($2167 \times 30\% = 650$) of audio records of all interviews of each interviewer were listened to by controllers of M-Vector for accuracy as well as for accurate entry of respondent's answers into the database. The interviews for control were randomly selected for each interviewer. In case of gross errors in interviews, they were discarded and rewritten.

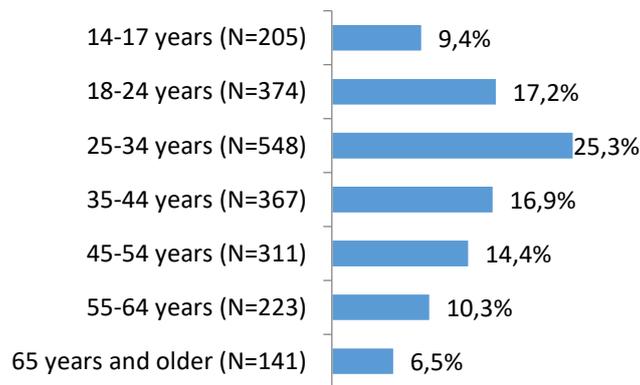
10% ($2167 \times 10\% = 217$) of all interviews of each interviewer were checked by controllers for reliability of surveys, accuracy of completed itinerary lists and maps, using a **follow-up interview or telephone call** method. Interviews for control were randomly selected for each interviewer.

1. Socio-Demographic Profile of Respondents

2,167 respondents were interviewed in the survey on the media preferences of the population of Kyrgyzstan. At the same time, only 1 randomly selected person was interviewed in each household. The minimum number of people in a single household is 1 person, and the maximum is 20 people. On average, each individual household has four people.

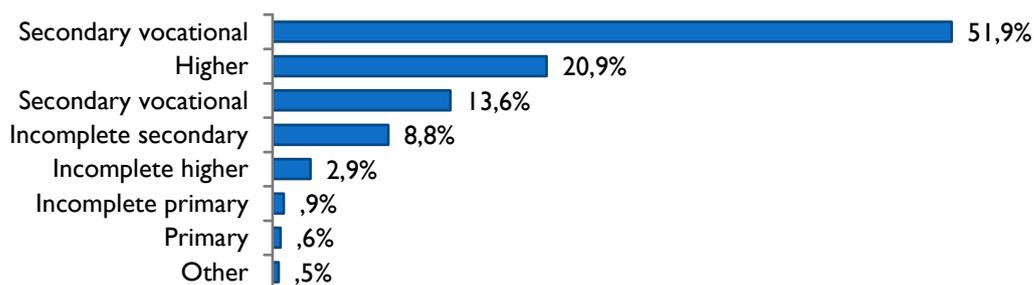
Half of the households surveyed had minor children, who were own children of the respondents. The survey sample included both men and women of different age groups. The prevailing majority of respondents fell into the age group of 25-34 years old.

Figure 1.1 Respondents' age, N=2,167, %



The majority of respondents were people with general secondary education. Every fifth respondent in the media research has higher education. Moreover, 14% of interviewees have vocational secondary education as their maximum level of education (Figure 1.2). The "Other" category contains people without education who refused to answer or could not answer the question.

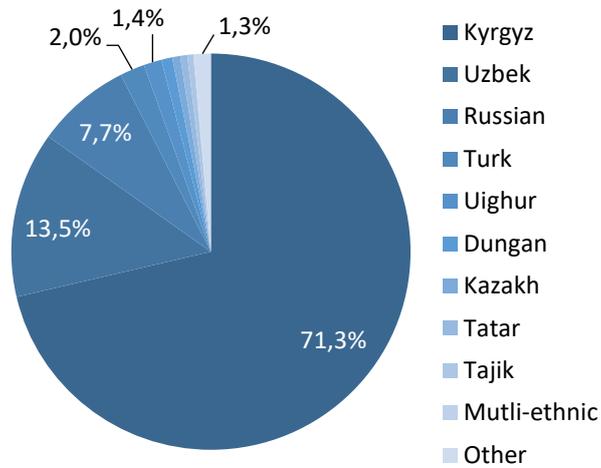
Figure 1.2 Respondents' level of education, N=2,167, %



The ethnical composition of the surveyed population of the republic was diverse. Thus, representatives of various ethnic groups took part in the survey. The distribution of respondents by ethnic background practically corresponds to the share of every ethnic group in the total number of population. The absolute majority of respondents are represented by Kyrgyz respondents. The share of Uzbek ethnic group is rather significant in the sampling structure, and the third significant group is the Russian ethnic group (Figure 1.3). The "Other" category contains representatives of the Korean ethnic group, Ukrainians, Azerbaijanis, and others.

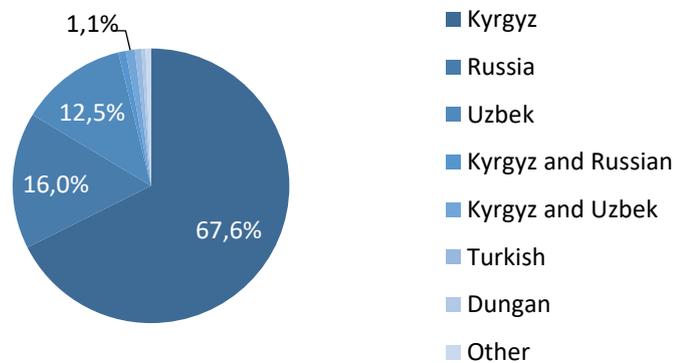
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Figure 1.3 Respondents' ethnicity, N=2,167, %



The main language of interaction of respondents in households in the majority of cases corresponds to their ethnic background. In addition to the Kyrgyz language prevailing in household interaction, every sixth respondent speaks to their relatives in Russian, and every eighth one speaks in Uzbek. Since a certain part of the Kyrgyz and Uzbek ethnic groups feels more comfortable to interact in Russian with their household members, it takes the second place in the prevalence of the respondents' language of interaction within households. Some of the respondents also speak with their families mostly in Tajik, English, Uighur, Kazakh or Azerbaijan languages, which are represented in the "Other" category. (Figure 1.4).

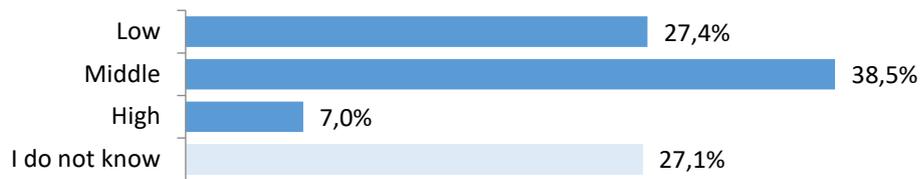
Figure 1.4 Preferred language of communication in the household, N=2,167, %



The financial standing of households varies from family to family. According to the research findings, about 30% of respondents have low income per family member, i.e. up to KGS2,500 per person. The share of households with the average level of monthly income per every family member is much higher. More than one third of respondents claim that the income per every family member is from KGS2,500 to KGS10,000. Only 7% of families can boast of a high level of material welfare of their households, where the monthly income per family member exceeds KGS10,000. (Figure 1.5)

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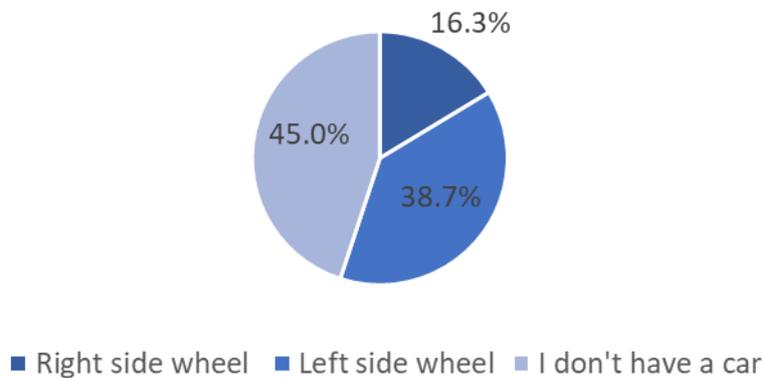
Figure 1.5 Average monthly income per household member, N=2,167, %



For the convenience of their income management, representatives of households have the opportunity to use various financial products of the banking system. Thus, during the research it was found out that one third of the population (34.4%) in the last year sought the services of banks or microcredit organizations.

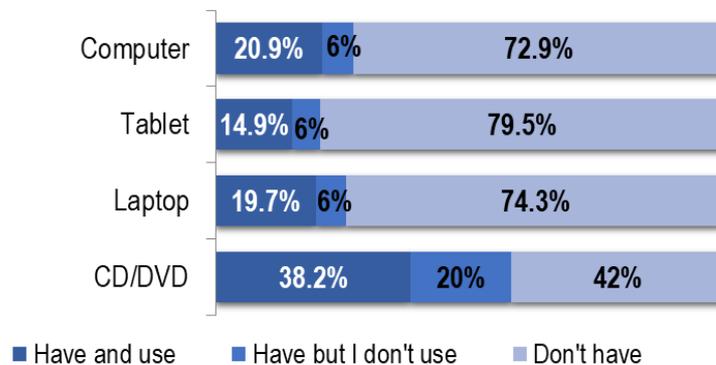
According to the survey, more than half of respondents own a car. However, 38.7% of the population own cars designed for left-hand drive, which gives their owners a higher level of safety on the roads. However, 16.3% of the country's population own right hand drive vehicles.

Figure 1.6 Presence of a car in the household, N=2,167, %



In addition to cars, some households own different types of electronics, which are not only the sources of access to media, but also influence media preferences of the population. According to the findings, the significant proportion of respondents use CD/DVD players. Fewer households have computers and laptops that are used by their members. It is also worth noting that 5-6% of respondents who have computers, laptops and tablet PCs do not use them in their livelihoods. (Figure 1.7)

Figure 1.7 Presence and use of operable electronic devices, N=2 167, %

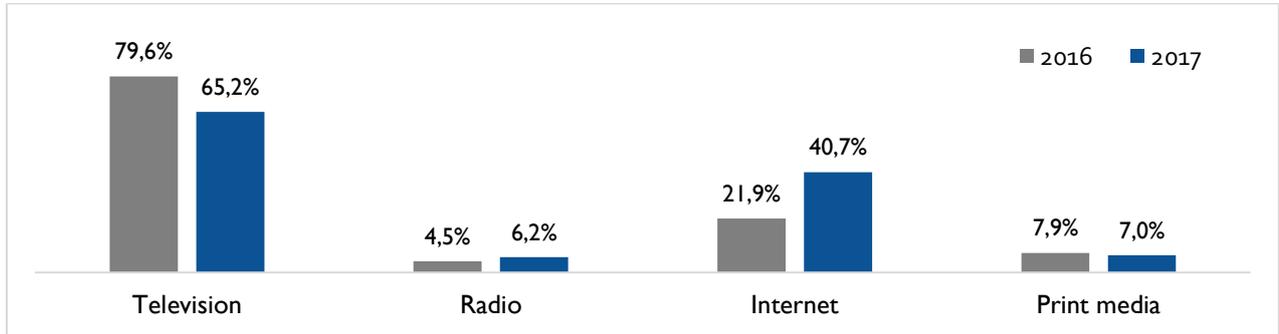


As to information obtaining by the population of Kyrgyzstan, television remains as the main source despite the fact that, compared to 2016, the proportion of the population that use it as the main source of information declined by almost 15%. In turn, the Internet as the main source of

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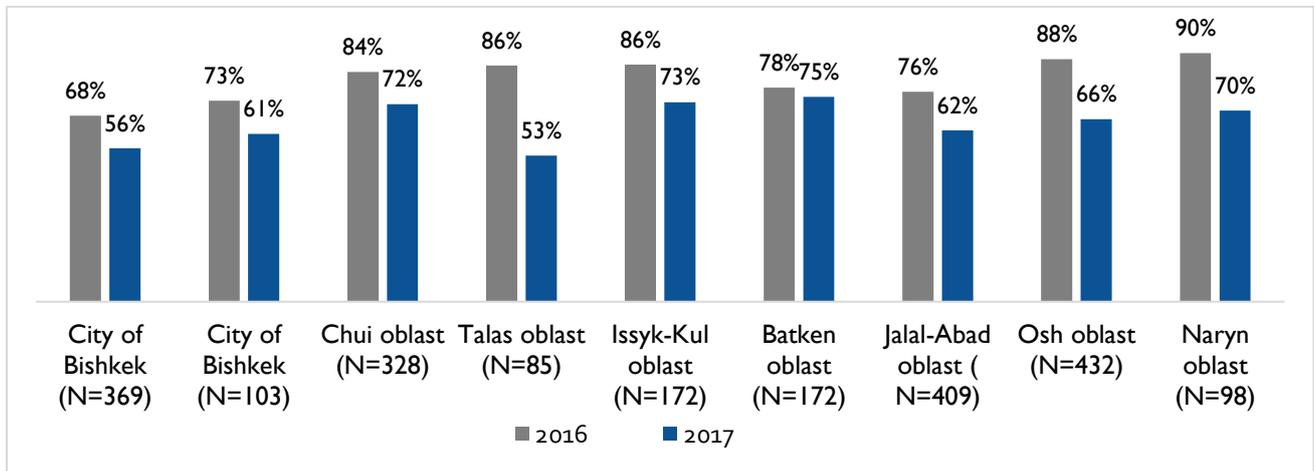
information takes the second place after television. Thus, the share of the population that uses this source of information in 2017, compared to the previous year, almost doubled (Figure 1.8).

Figure 1.8 Key sources of information used by the population, N=2 167, %



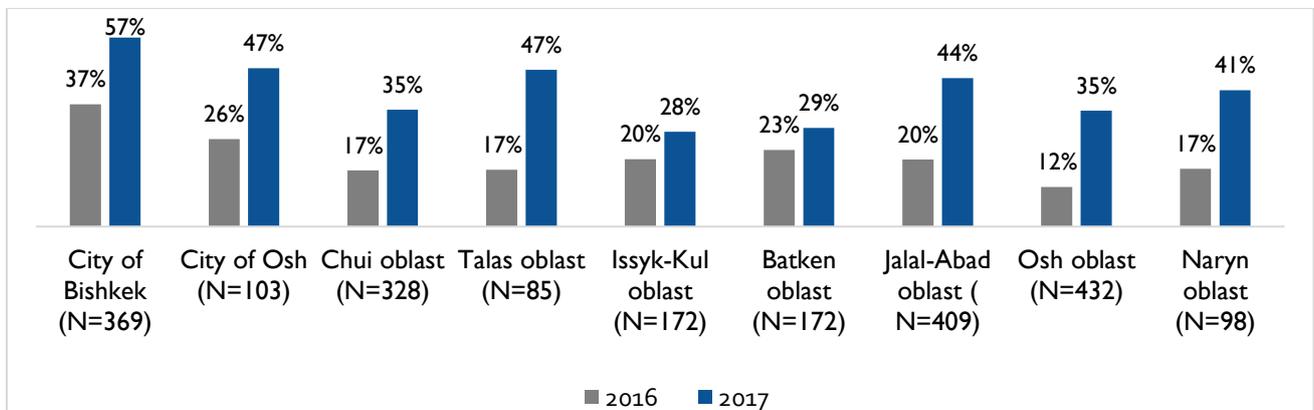
It also should be mentioned that the biggest decline in the number of people who use television as the main source of information is seen in Talas and Naryn oblasts (Figure 1.9)

Figure 1.9 Key sources of information used by the population, television



As for the Internet, the significant growth in the number of people that use it as the source of information is seen almost in all regions of the country and it has practically increased 2-3 times, except for Issyk-Kul and Batken oblasts, where the increase of the population using this source of information is less than 10% (Figure 1.10)

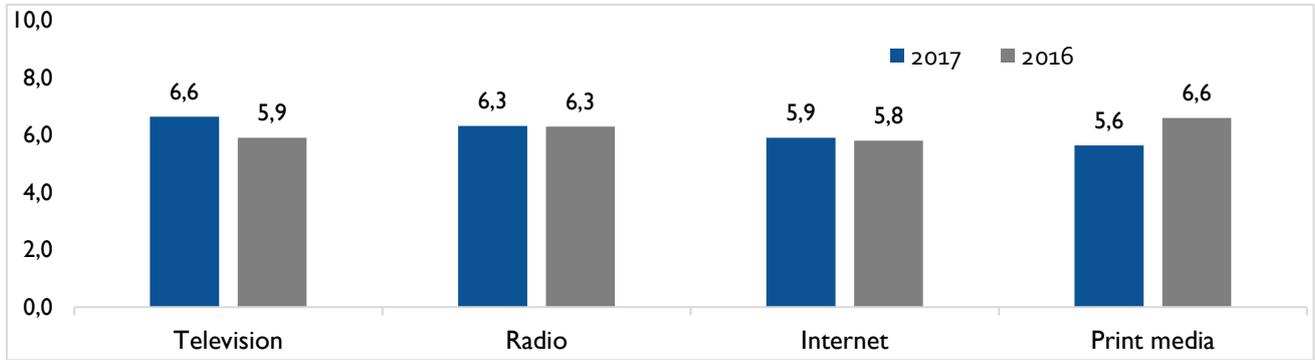
Figure 1.10 Key sources of information, Internet



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Regardless of the used source of information, the average level of public trust in the information they see/hear from various media resources is about 6 points on a 10-point scale, where 1 point means "do not trust at all" and 10 points mean "fully trust". However, if compared to the last year, the average estimate of the level of trust in print media has increased slightly, in particular in television and the Internet (Figure 1.11).

Figure 1.11 Evaluation of trust in the sources of information on a 10-point scale with 1 being "do not trust at all", and 10 being "fully trust", N=2167, average score

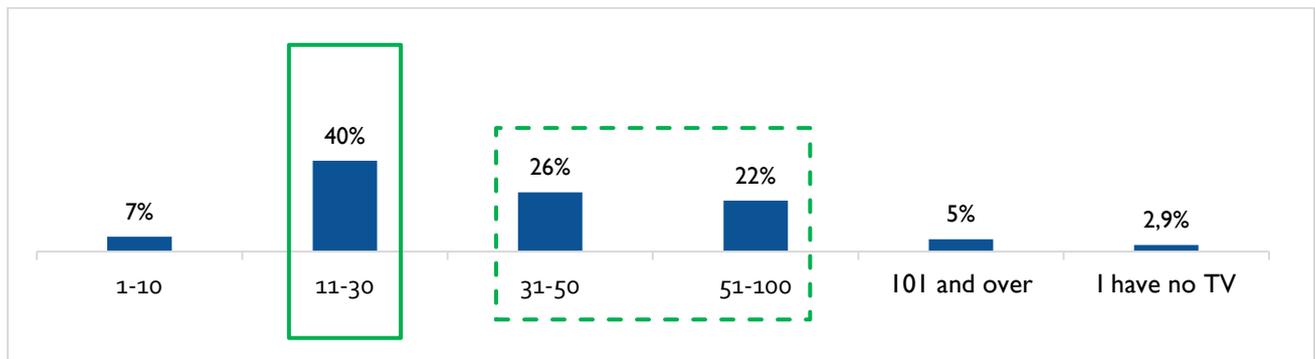


2. Overview of the Television Market after the Transition Digital Broadcasting

2.1. Access to Television

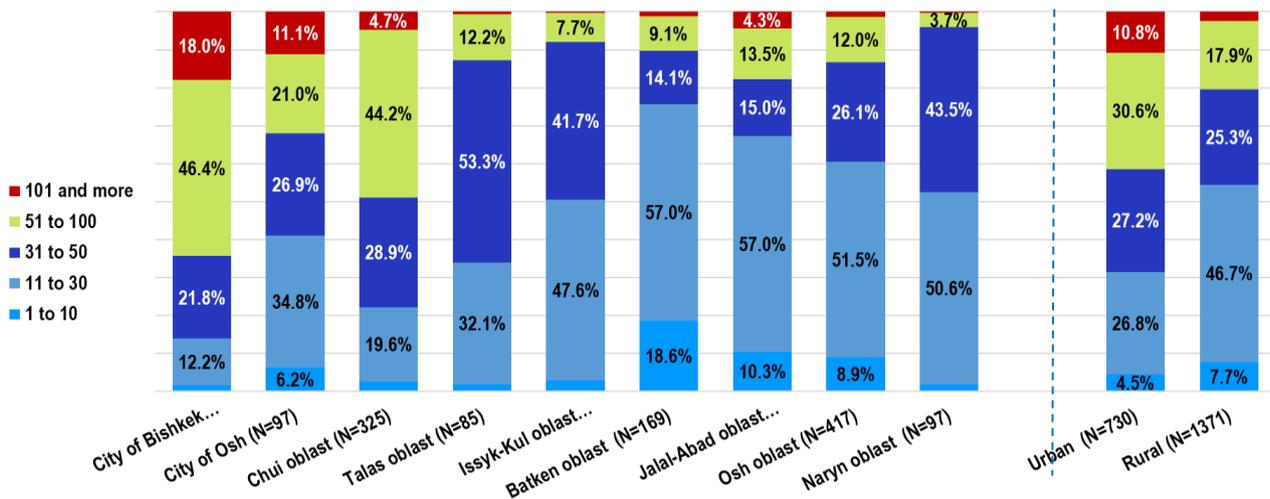
According to the results of the 8th wave of media research, 97% of the Kyrgyz population has a TV at home. The number of TV channels that can be viewed by the country's population in most cases varies from 10 to 100. At the same time, about 40% of the population has access to 11-30 TV channels, and approximately the same share - to 31-100 TV channels. (Figure 2.1)

Figure 2.1 Number of TV channels available, N=2,101



The majority of the rural population having a TV at home has access to fewer TV channels than the urban one. Data disaggregation by oblast shows that the majority of residents of southern oblasts, with the exception of Osh, has access to fewer TV channels than those of northern oblasts. (Figure 2.2)

Figure 2.2 Number of TV channels available



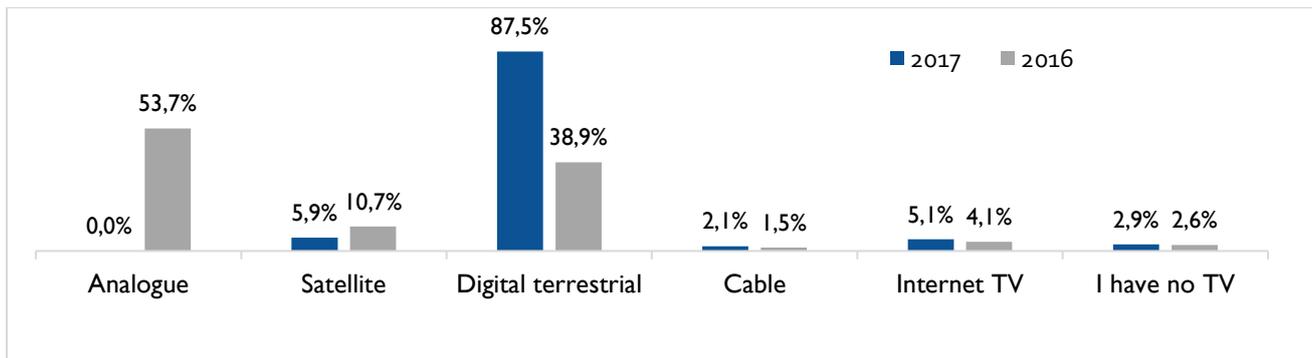
As for the access to various types of television, 87.5% of the population have unimpeded access to digital terrestrial broadcasting, which is due to the transition of Kyrgyzstan to digital broadcasting format (DTV). The transition to DTV provided an opportunity for the entire population to watch a wider range TV channels in better quality free of charge. The analogue type of broadcasting was completely disconnected throughout the country on May 17, 2017.

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Cable and internet TV are paid types of television. As for satellite TV, access to this type of television can be obtained both on a fee-for-service basis through the appropriate provider and on a free-of-charge basis by making a one-time investment into the acquisition and installation of the necessary equipment. It is also worth noting that paid TV, which requires a monthly payment to the provider, is not available to most residents of the country due to the lack of representation in many localities in Kyrgyzstan.

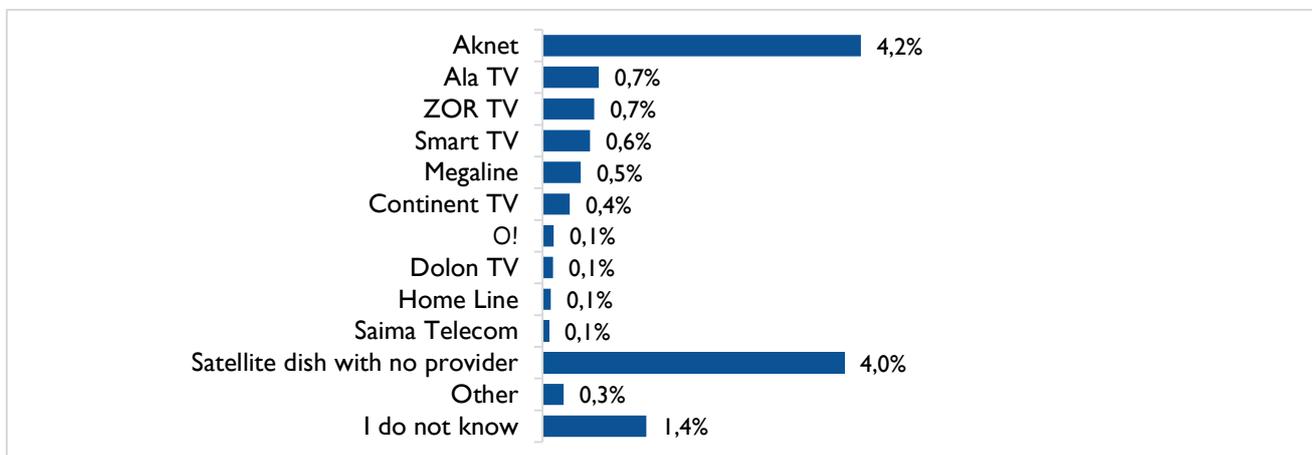
Additional costs associated with access to paid TV and low penetration of cable, satellite or Internet TV explain the fact that these types of TV are used by only 9% of the population. It has not escaped our notice that after the transition of Kyrgyzstan to DTV and the expansion of the range of TV channels, some of the population refused to use satellite and Internet TV in favor of DTV. (Figure 2.3)

Figure 2.3 Types of TV used by the population, N=2,167



The provider of paid TV services in Kyrgyzstan that have highest representation is Aknet. It is also a common practice to have a satellite dish at home without a contract with any provider. (Figure 2.4)

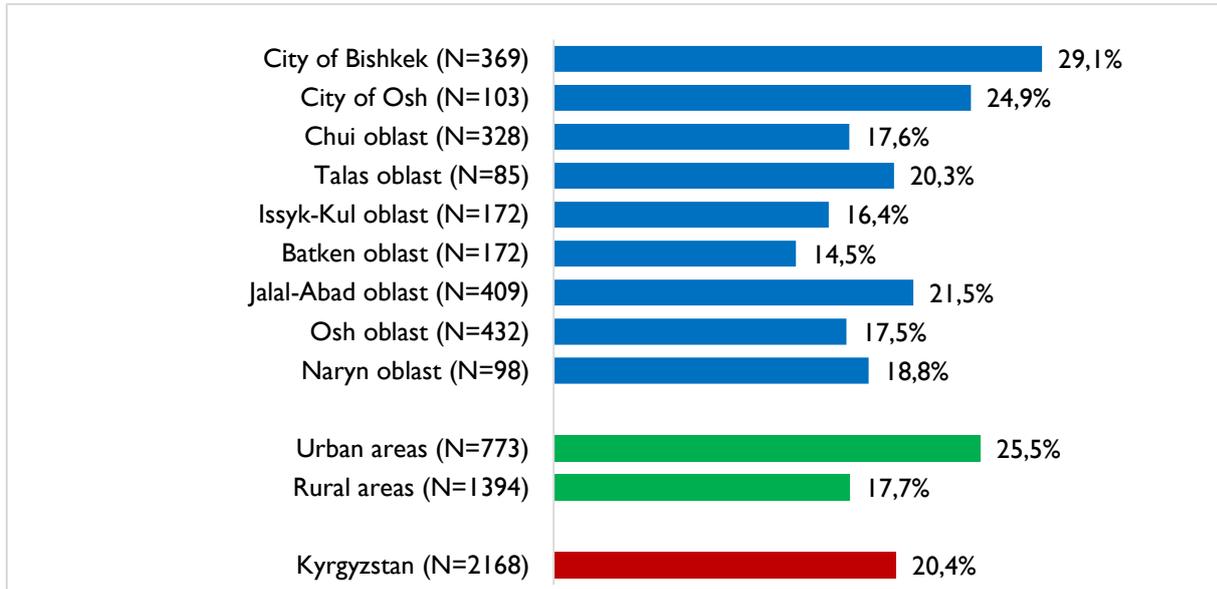
Figure 2.4 Use of providers' services by the population, N=2,167



It is also worth mentioning that in the light of rapidly developing technologies, the population of the country gets ahold of new opportunities of TV viewing. For instance, access to the Internet makes it possible to watch TV channels online in real time, and also to view the pre-recorded content of TV channels. 65.2% of the total population know about this opportunity, while only about 20% actually make use of it. Depending on the oblast, the share of the population that uses the Internet to watch TV varies from 15% to 29%. At the same time, the share of such respondents among urban population is higher than that among the rural population. This statement also applies to the cities of Bishkek and Osh, as compared with the oblasts. (Figure 2.5). Men and women use this opportunity equally.

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Figure 2.5 Share of the population using a mobile telephone/tablet/computer to watch TV, disaggregated by oblast



The age-based analysis shows a direct correlation with the level of Internet use for viewing TV. The older age groups are less likely to take advantage of this opportunity (Figure 6). A similar situation is demonstrated by the income-based analysis, i.e. the higher the level of income, the more likely that this TV viewing method is used (Figure 7).

Figure 2.6 Share of the population using a mobile phone/tablet/computer to view TV, disaggregated by age

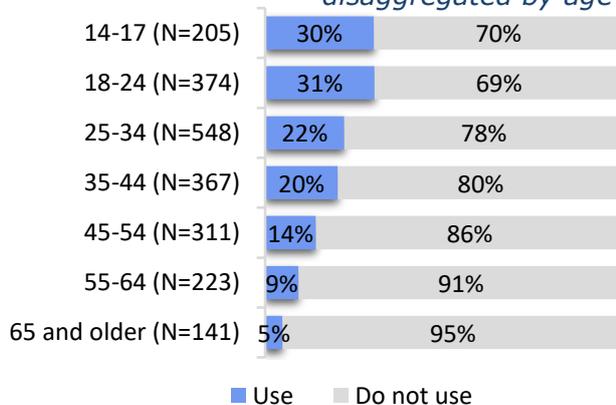
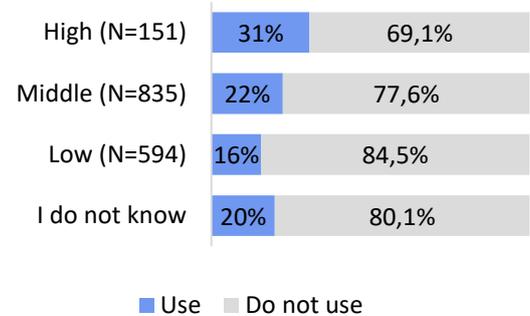


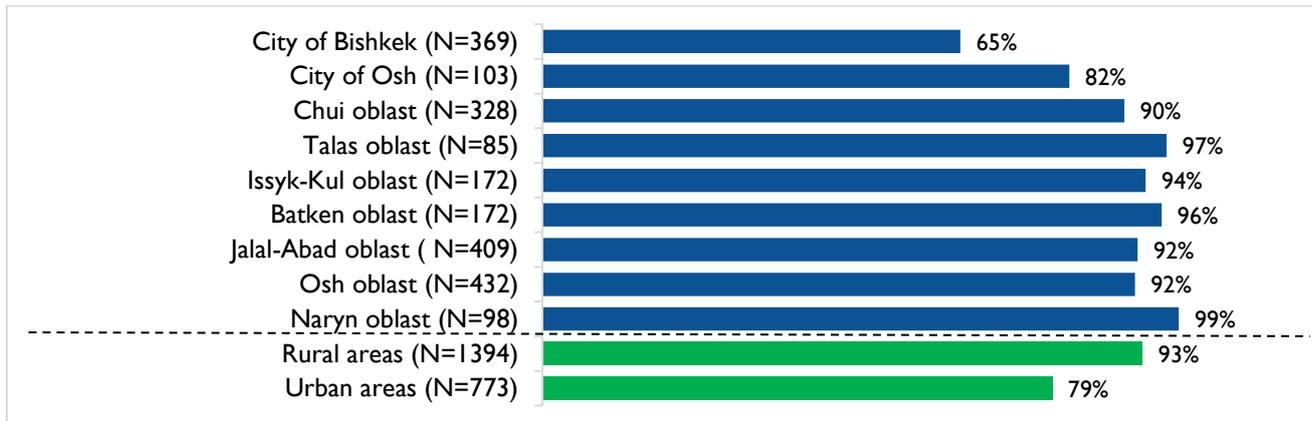
Figure 2.7 Share of population using a mobile telephone/tablet/computer to watch TV, disaggregated by the level of income



Despite the alternative types of television available in the modern world, as mentioned earlier, the most common type of TV available to the country's population as at the end of 2017 is digital terrestrial television. At the same time, the share of the population having access to digital television is below the national average in the cities of Bishkek and Osh. This situation is explained by a multitude of alternatives in these cities (Figure 2.8).

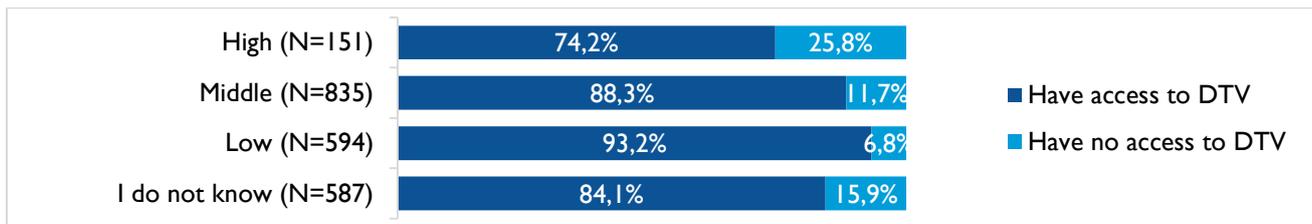
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Figure 2.8 Level of access to DTV, disaggregated by oblast



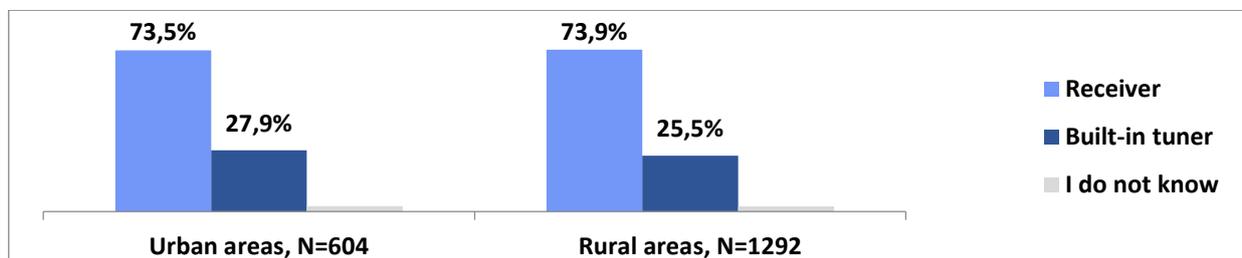
Gender- and age-based analysis demonstrates no significant differences in access to DTV between different age and gender groups, because the availability of television and its type do not normally pertain to an individual, but rather to a household. However, there is a dependence on the household income level: the higher the household income, the lower the level of DTV use. Households with higher incomes are more likely to afford some type of paid TV (Figure 2.9).

Figure 2.9 Level of access to DTV, disaggregated by household income level



At the same time, gaining access to DTV requires additional equipment that must be purchased, or a modern TV with a built-in tuner. According to the study results, 87.5% of the population has the necessary equipment: 26.3% of the population having access to the DTV use a built-in tuner, 73.8% additionally purchased a receiver for this purpose, and 2.1% use both a receiver, and a built-in tuner (when there are more than two TVs in the household) (Figure 2.10). Disaggregation by oblast and type of settlement (urban/rural) shows no significant differences in the use of devices providing access to DTV.

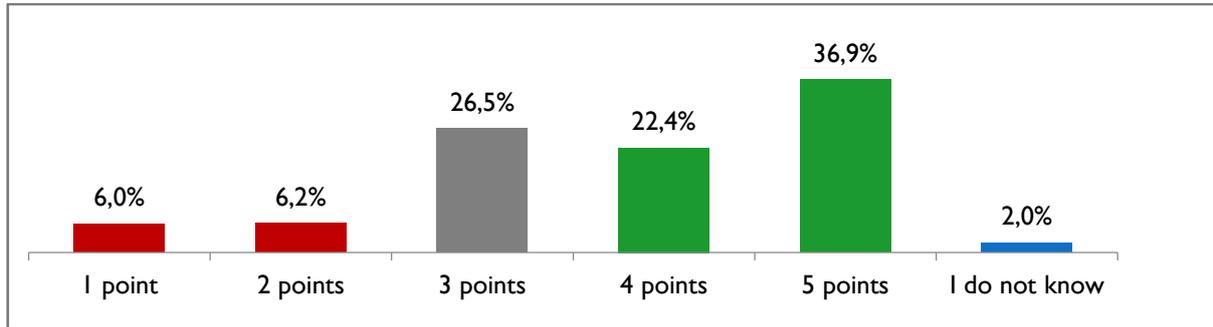
Figure 2.10 Devices used to access DTV



As part of the study, the population having access to DTV also rated the quality of broadcasting. The average score given to the quality of digital terrestrial broadcasting on a 5-point scale, with 1 being very poor, and 5 being very high, is 3.7 points, i.e. slightly above average. At the same time, about 59% of those who have access to DTV, evaluated the quality of broadcasting as being high or very high. (Figure 2.11)

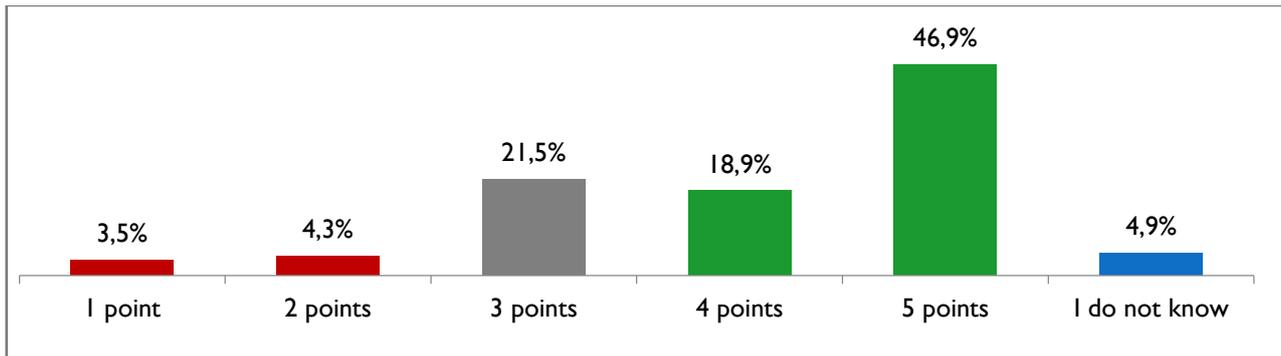
Media Research: Population Preferences

Figure 2.11 Evaluation of the quality of digital terrestrial broadcasting on a 5-point scale, with 1 being very poor, and 5 being very high, N=1,896



With regard to the satisfaction with the range of TV channels included in the social package of digital broadcasting, the average score given by the population having access to DTV is 4.1 points on a 5-point scale, with 1 being "does not correspond to the preferences at all", and 5 being "fully corresponds to the preferences". At the same time, only 7.8% noted that the TV channels included in the social package did not correspond to their preferences (Figure 2.12).

Figure 2.12 Evaluation of preferences with regard to TV channels included into the social package of digital broadcasting in a 5-point scale with 1 being "does not correspond to the preferences at all", and 5 being "fully corresponds to the preferences", N=1,896

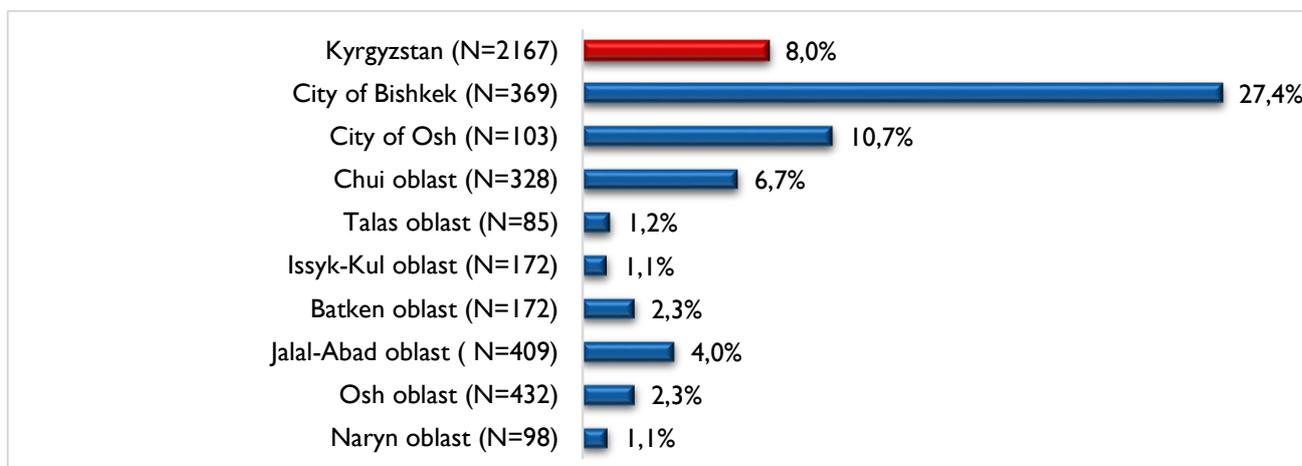


Technical development of television leads to a change in the television audience. The values of the audience in TV viewing, their preferences and attitudes to television change.

As mentioned earlier, 87.5% of the country's population have the necessary equipment to access DTV, while 12.5% do not. At the same time, 4.5% of the population plan on acquiring the same in the next 6 months to be able to watch the TV channels included in the package of digital terrestrial broadcasting. Accordingly, we can make the assumption that in half a year, the share of the population having access to DTV will increase to 92%. At the same time, the remaining 8% of the population do not plan on acquiring equipment to gain access to DTV for some reason in the next six months. The share of such residents in the cities of Bishkek and Osh make up the largest share in the total population of these cities - 27% and 11%, respectively (Figure 2.13). The main reasons for the unwillingness to connect to DTV are the use of provider services and the lack of understanding of the point of using DTV.

Media Research: Population Preferences

Figure 2.13 Share of the population that does not plan on acquiring the equipment to gain access to DTV in the next 6 months

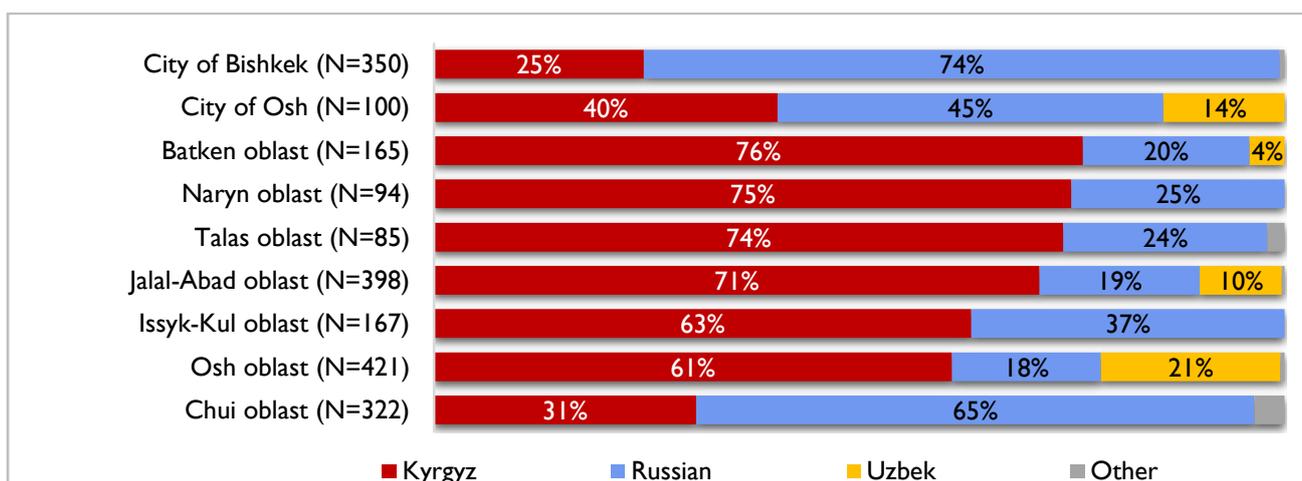


2.2. Television Viewing Practices and Preferences

The population that watched television at least 5 minutes in the last six months makes up 97% of the total country's population. More than half of them prefer to watch TV in the Kyrgyz language (54%), while 38% prefer to watch TV content in Russian, 7% - in Uzbek and about 1% - in other languages.

At the same time, TV content in the Russian language is preferred by the largest share of TV viewers in the cities of Bishkek and Osh, and in Chui oblast. No one prefers watching TV in the Uzbek language in the northern oblasts (Figure 2.14).

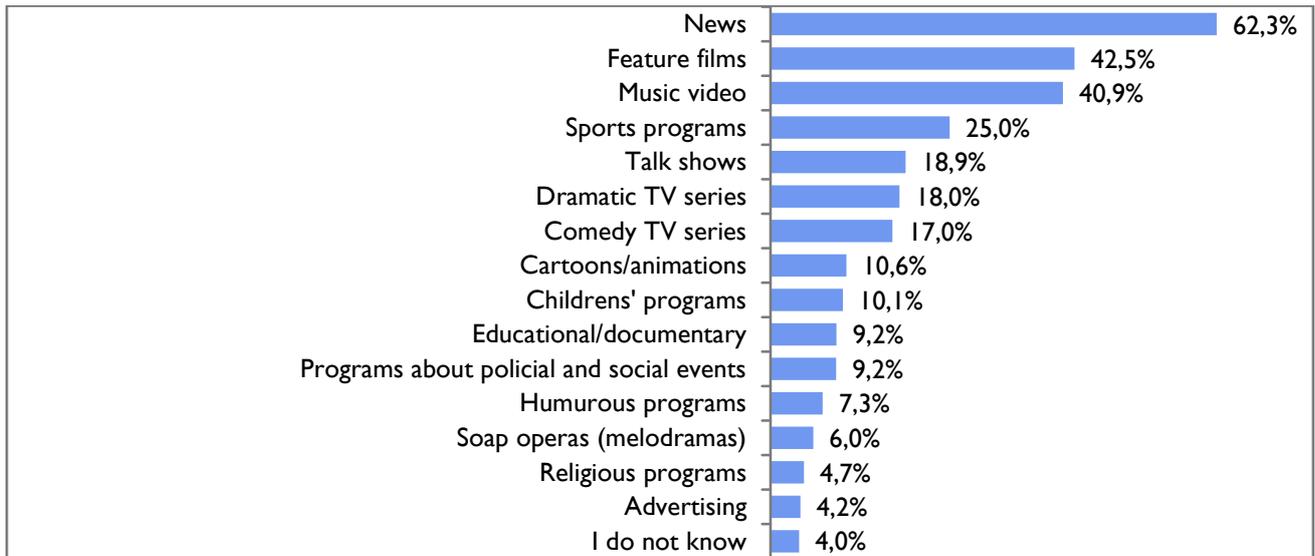
Figure 2.14 TV viewing languages preferred by the active audience



It was also revealed that the most preferred types of TV programs are news, feature films and music videos (Figure 2.15).

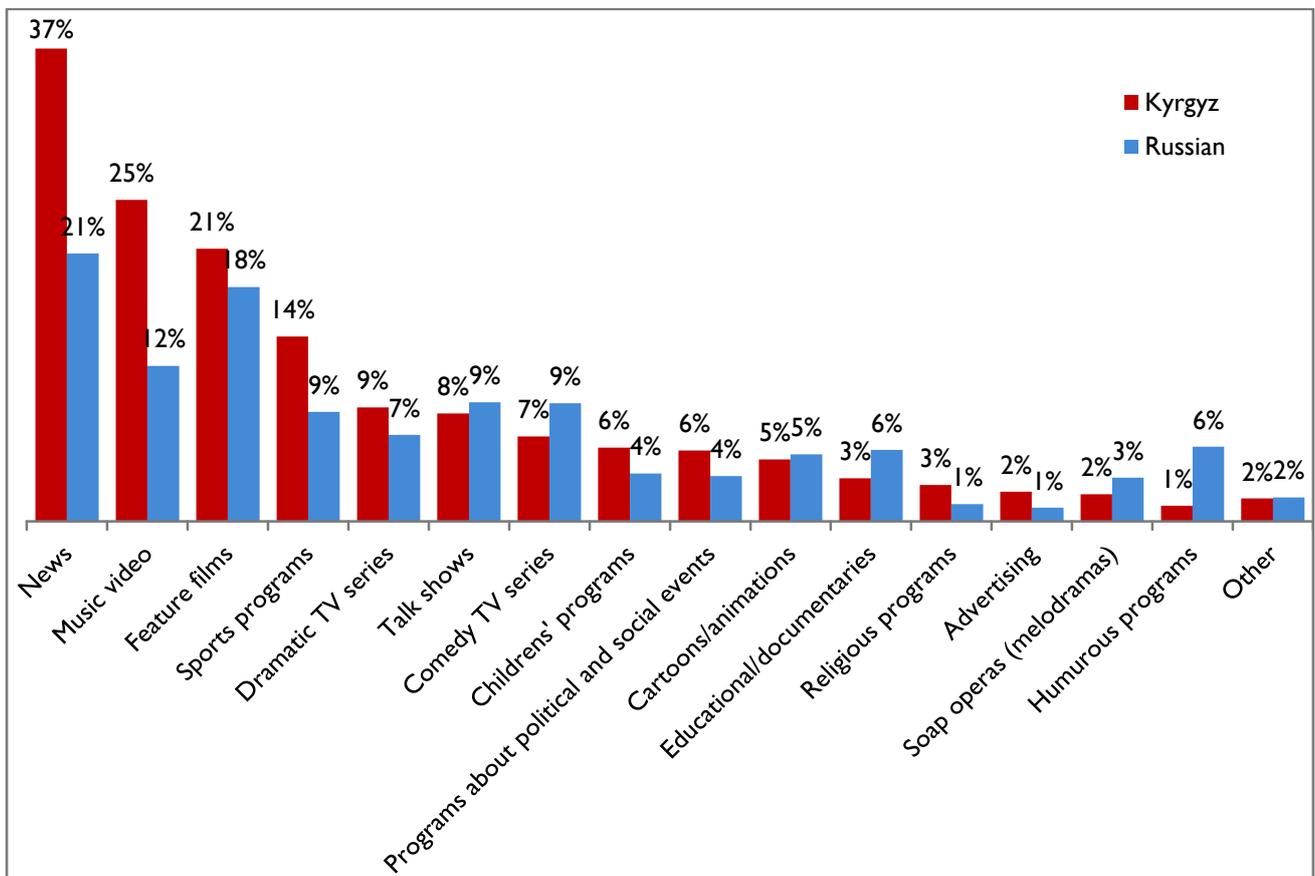
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Figure 2.15 Favorite types of TV programs, N=2103



It should be noted that such genres as talk shows, comedy TV series and programs, soap operas and documentaries are more preferable to the part of the population that views TV in the Russian language (Figure 2.16).

Figure 2.16 Favorite types of TV programs, disaggregated by the viewing language, N=2,103



Media Research: Population Preferences

Media Indicators

When it comes to the television industry, a great role is played by media indicators, which form the basis of the assessment of the television market. Media indicators are crucial for TV channels, advertising agencies, advertisers, and other representatives of the media industry.

The analysis of the media market done in the international practice employs a number of indicators presented in Table 2.1.

Table 2.1 Media indicators applicable to television

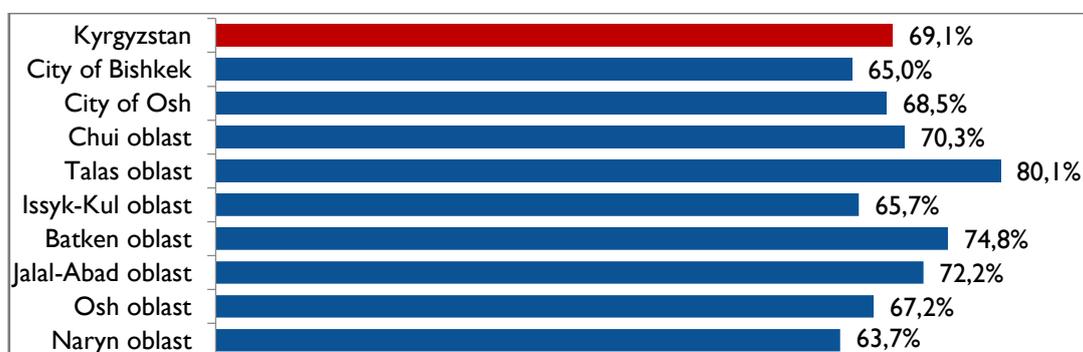
Average daily/weekly reach	Average number of people viewing TV every day/once a week
Ratings	Average number of viewers who watched a particular program / TV channel in a specific time interval or time of day as a percentage of the total population
Share	Share of time spent on viewing a specific TV channel at a specific time of the day in the total time of daily viewing of all TV channels. The estimation uses the size of the audience and average viewing time

In accordance with the methodology developed jointly with international experts in media measurements, M-Vector researchers estimated the average daily (ADR) and weekly (AWR) reach of TV in general and for specific TV channels, as well as the average share of television viewing (share) and TV channel ratings (ratings).

To determine the average daily reach, the researchers estimated the share of population for each day of the survey that watched TV on the eve of the interview. Thus, the average daily reach (active audience) was 69.1% of the country's population; in other words, about 69% of the population aged 14 years and over watches TV every day. Compared with 2016, this indicator decreased by almost 6% (accounting to 75% in 2016). We assume that one of the reasons for this situation may be the development of the Internet in Kyrgyzstan and the growth of the share of Internet users.

The oblast-based disaggregation revealed that the share of the population making up an active TV audience is higher in the southern oblasts than in the northern ones (Figure 2.17)

Figure 2.17 Share of active TV audience, disaggregated by oblast

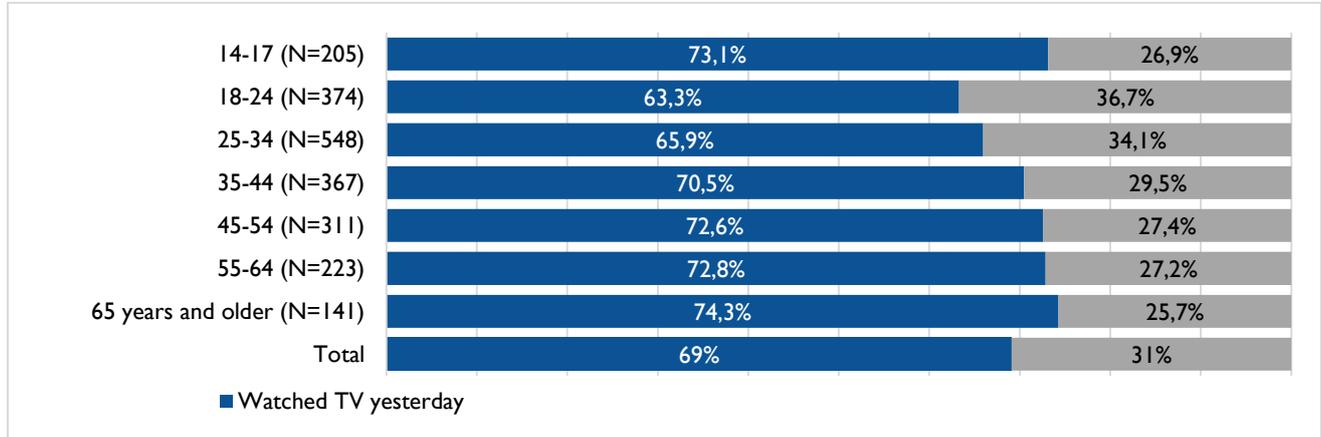


The daily/active television audience is represented by 68% of all men and 70% of all women surveyed. With regard to the age, the share of the population that is an active TV audience in the

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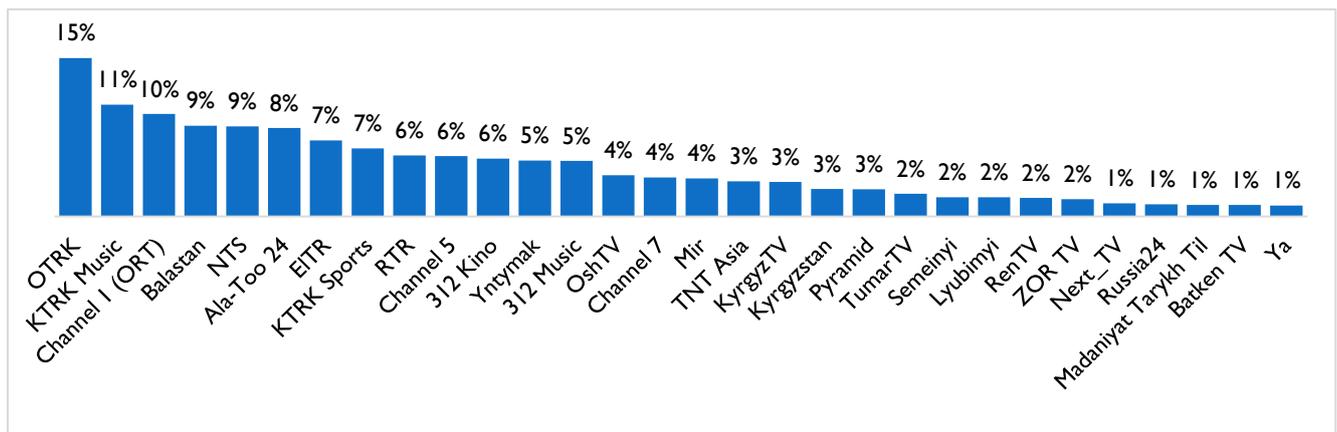
age group of 18 to 35 years is smaller than the average for the country ranging from 63% to 66%. In other age groups, this indicator is higher than the national average (Figure 2.18). Data analysis by household level of income and the type of settlement (urban/rural) did not reveal any significant differences.

Figure 2.18 Share of active TV audience, disaggregated by age group



As mentioned earlier, the average daily audience of TV is 69.1%, which is shared by the range of TV channels presented in the country. The TV channel which has the largest daily reach across the country is OTRK (KTRK). The share of the population that watches it daily makes up on average 15% of all Kyrgyz citizens aged 14 years and older, or about 648,600 people. The second place in terms of the daily reach belongs to KTRK Music, the third - to Channel 1 (ORT). The four TV channels of the Public Broadcasting Corporation (KTRK) are included in the top 10 in Kyrgyzstan according in terms of daily reach (Figure 2.19). It should also be noted that at the national level, those TV channels that broadcast only in some oblasts of the country have lower media indicators than those broadcasting throughout the country, despite the fact that local regional channels may have higher audience at the regional level.

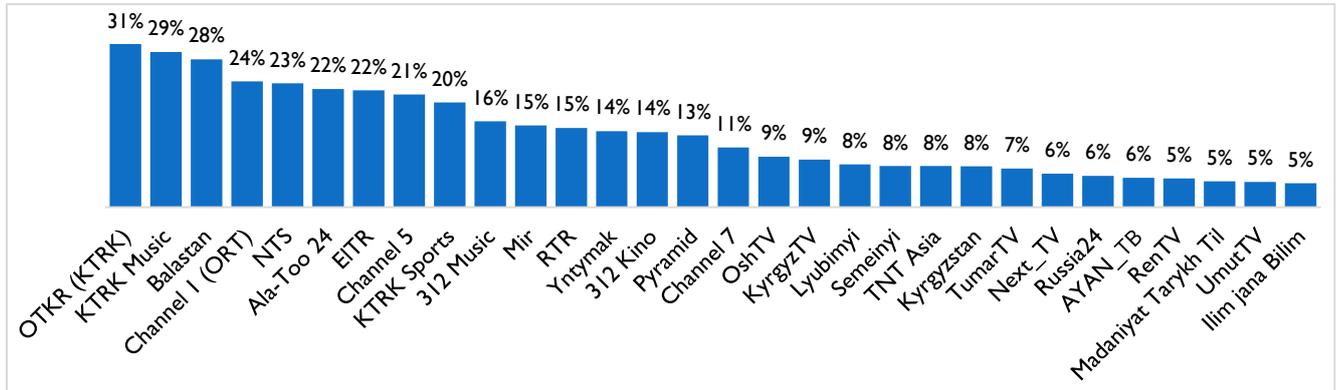
Figure 2.19 Average daily reach, disaggregated by TV channel, TOP-30, Kyrgyzstan, N=2,167



As for the average weekly reach, 92.6% of the total population watched TV during the week preceding the survey at least once. At the same time, the average weekly reach for each TV channel at the level of Kyrgyzstan exceeds the average daily reach by more than 2 times (Figure 2.20). The reason why the weekly reach does not exceed the daily one by 7 times (based on 7-day week) is that not all the population watches television and particular TV channels every day.

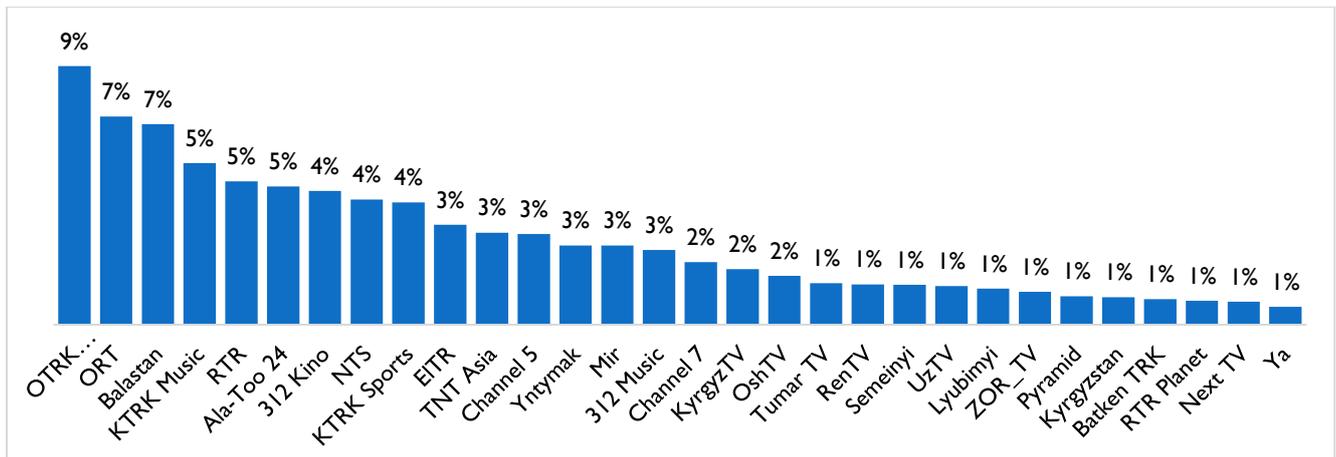
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Figure 2.20 Share of the average weekly reach in the total population, TOP-30, Kyrgyzstan, N=2,167



The share of TV viewing in the total daily TV viewing is distributed among a larger number of TV channels than in previous years, due to the fact that with the transition of Kyrgyzstan to DTV led to the expansion of the range of TV channels in the country. This situation resulted in a reduction in the daily television viewing shares of TV channels that began broadcasting before the transition to DTV. This happened due to the launch of new TV channels, which already acquired considerable shares in the overall television viewing. For instance, the share of television viewing for TV channels in the TOP-10 at the level of Kyrgyzstan varies from 3% to 9%. There are no big differences in terms of the size of TV channels' shares at the country level (Figure 2.21). It is also worth noting that the positions of TV channels in terms of the reach and share may differ. This is explained by the fact that even if some TV channel has a large reach, it may not be necessarily watched for a long time, and vice versa, having a smaller reach, the TV channel can be watched for quite a long time. So, the *share* indicator is based on the time devoted for viewing a TV channel.

Figure 2.21 Share of daily TV viewing, disaggregated by TV channel, TOP-30, Kyrgyzstan

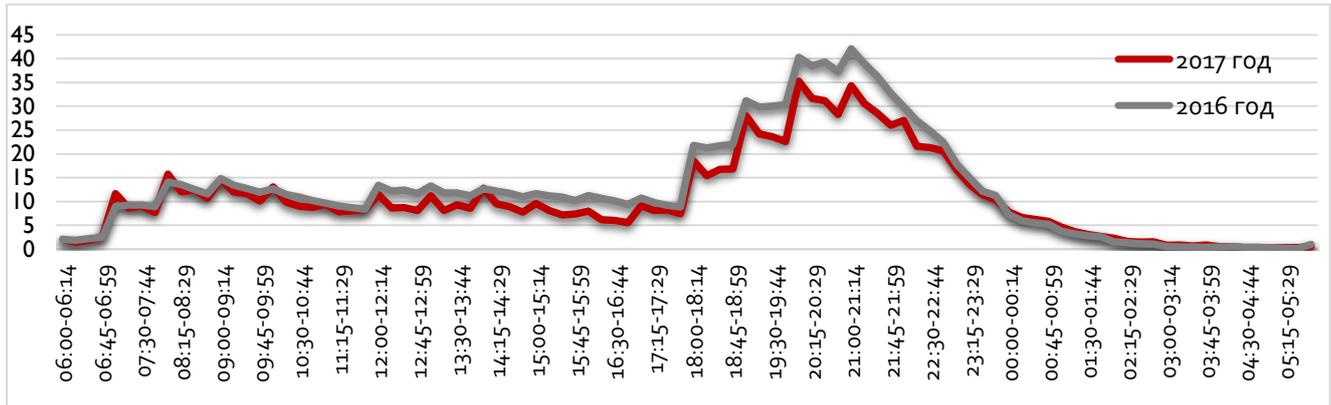


Ratings is also one of the most important media indicators characterizing the situation on the market. Ratings is the defining indicator of the competition between TV channels. Based on ratings, TV channels make strategic decisions on other programming and form the price for advertising time. Knowing their ratings, TV channels can develop effective broadcasting schedules by including the program, which will get the maximum reach. Advertising agencies and advertisers, in turn, use ratings for effective media planning and planning of advertising campaigns.

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Figure 2.22 presents the ratings characterizing all the TV channels broadcasting in Kyrgyzstan. The ratings are the averages for each 15-minute interval per day. According to the data obtained, there are evening and morning prime times (the time intervals when the largest share of the population is watching TV): from 8 to 10 am and from 7 to 10 pm, respectively. At the same time, compared with 2016, the audience, watching TV in the evening prime time fell by about 8-10%. (Figure 2.22)

Figure 2.22 Accessible TV audience, disaggregated by daily time intervals, % of population, Kyrgyzstan²



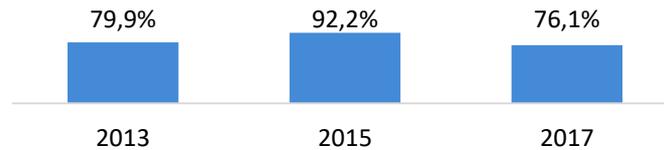
² Detailed information on each of the TV channels and rating is private.

3. Overview of the Radio Market and Population Preferences

3.1. Radio Penetration Rate

According to the results of the media research in 2017 (8th wave), the radio began to lose its positions in terms of penetration rate (access) among the population. So, over the last 6 months, 76.1% of the country's population aged 14 years and older listened to the radio (Figure 3.1), whereas in 2015 this indicator was 92.2%.

Figure 3.1 Have you listened to the radio for at least 5 minutes in the last 6 months?
N=2,400/ 2,000 /2,167, %

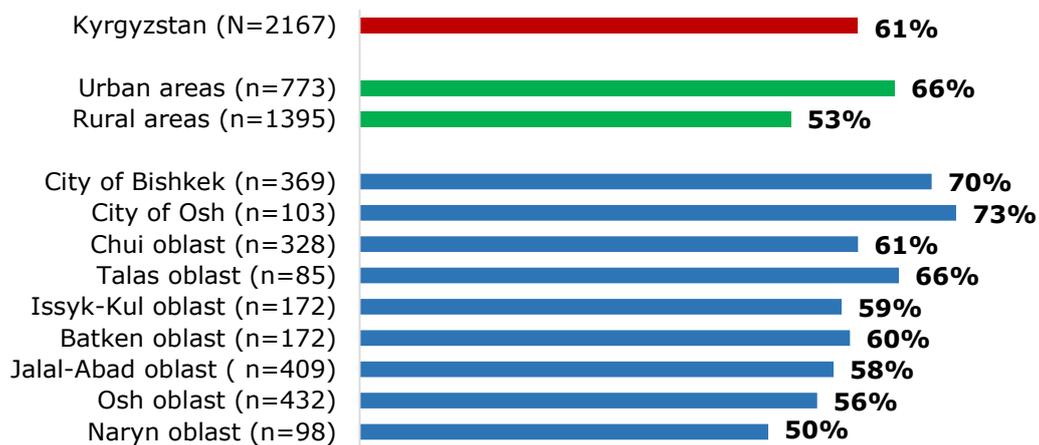


Thus, the penetration rate of radio decreased by 16.1% in 2017, compared to the data of the 2015 study.

The prerequisite for the reduced radio listening is the population's transition to digital television and an increased Internet penetration. We assume that the reason for reduced radio listening is the increase in the number of music TV channels, and the gradual shift of the audience to the Internet.

The analysis of the active radio audience revealed that 61% of the population listened to the radio during the week preceding the survey, and 39% did not listen to it.

Figure 3.2 Active radio audience disaggregated by oblast and type of settlement (weekly reach),
N=2,167, %



The oblast-based analysis of radio listeners revealed that the economically more active population concentrated in cities and large populated areas are more numerous radio listeners than the population of the oblasts. The residents of the capital and the surroundings show the greatest radio listening. Given, high employment rate and little time left to watch TV, radio is listened to 70% of Bishkek residents, and 73% of Osh residents.

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Another reason for the lower level of radio listening in the oblasts remote from the economic centers of the country can be explained by the lower availability of radio broadcasting and the low radio signal. The number of radio stations broadcasting in the center is 2-3 times higher than that in the oblasts.

The analysis of the socio-demographic profile of the respondents who listened to the radio during the last week shows that the number of men listening to the radio is greater than that of women (60% and 55%, respectively).

In the context of age groups, radio is to a greater extent preferred by adults (35-44 years), while by the age of retirement (65 years old), radio listening is reduced by almost a third (from 63% to 37%). There is also a slight difference in radio listening depending on the language spoken at home. The greatest number of radio listeners is among the Russian-speaking population (66%), concentrated mainly in the central parts of the country, Chui and Issyk-Kul oblasts, where the best conditions for radio listening were created. The smallest share of weekly reach is demonstrated by the ethnic Uzbeks (49%). The reason for this is their language preferences, which are different from the languages of broadcasting, as described later herein.

Figure 3.3 Radio penetration rate, disaggregated by gender, age and language spoken at home (weekly audience), %

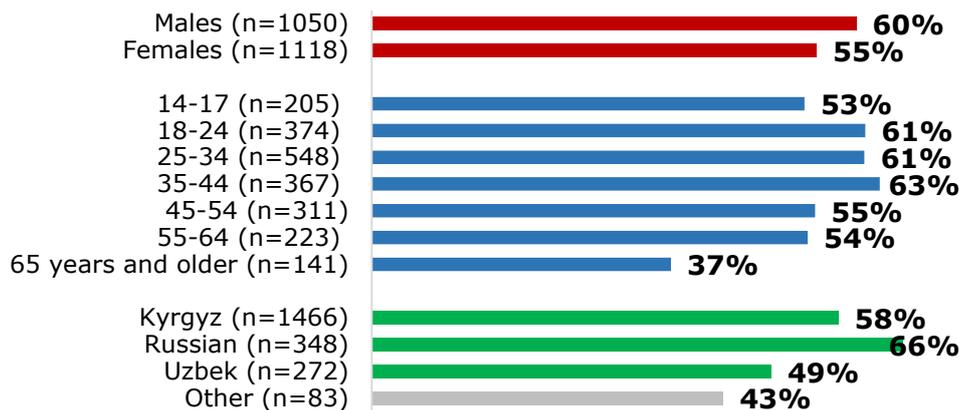
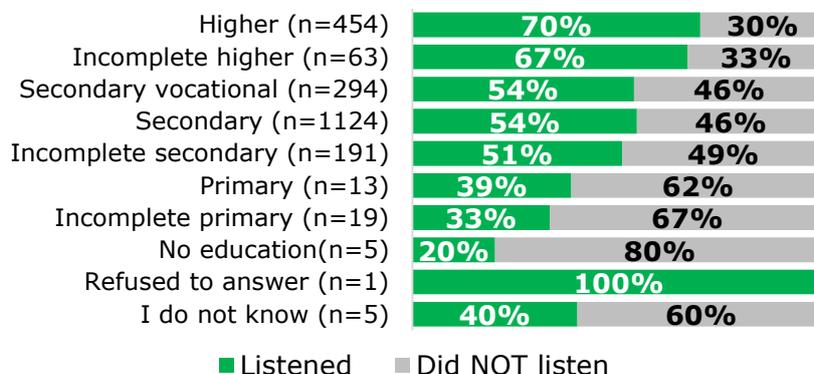


Figure 3.4 shows radio listeners' level of education (of those who listened to the radio during the week preceding the survey). An interesting trend is observed here: a greater number of educated respondents listen to the radio than that of uneducated ones - $\frac{3}{4}$ and $\frac{1}{5}$, respectively.

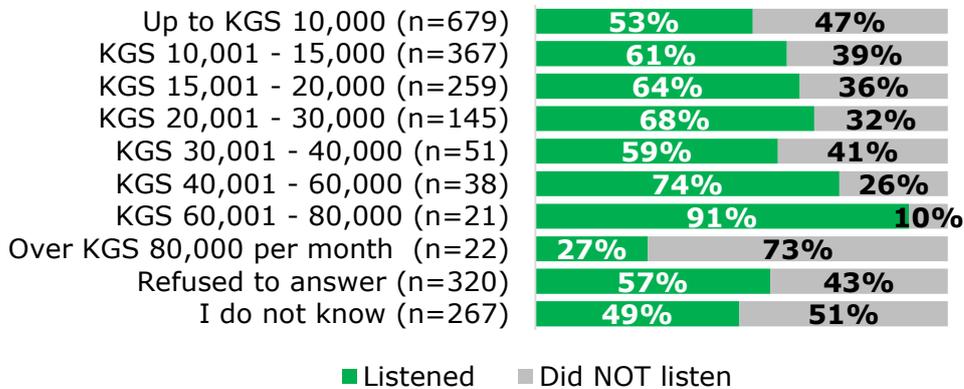
Figure 3.4 Radio listeners' level of education (of those who listened to the radio during the week preceding the survey), N=2,167, %



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In the context of household income level, the higher the income, the more likely a person to be a radio listener (Figure 3.5).

Figure 3.5 Radio listeners' income level (of those who listened to the radio during the week preceding the survey), N=2,167, %



As shown in Figures 3.6 and 3.7, radio listeners are slightly more likely to have a car (58.5%) than the entire population (55%). At the same time, the distribution of right- and left-hand cars among radio listeners is not different from that among the entire population.

Figure 3.6 Presence of a car, %

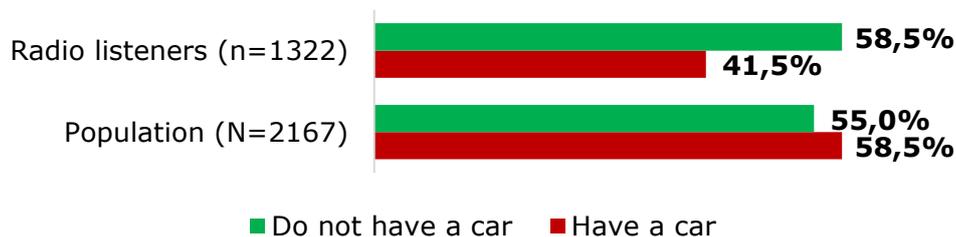
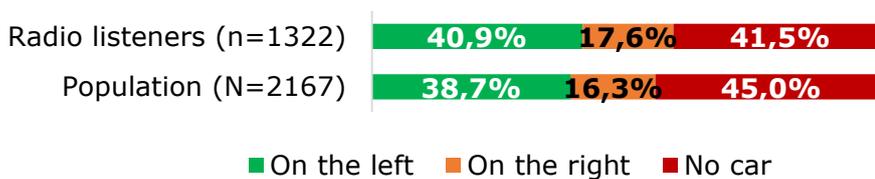


Figure 3.7 Wheel's position, %

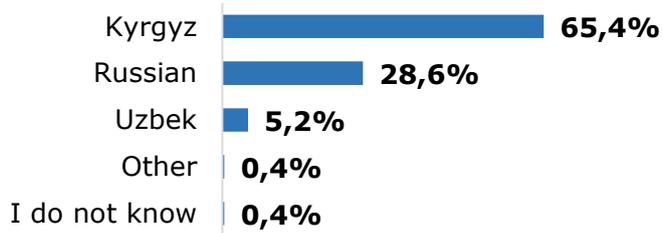


3.2. Radio Listening Practices and Preferences

As shown in Figure 3.8, the Kyrgyz language is the most preferred language for listening to the radio. About 2/3 of respondents prefer to listen to the radio in the Kyrgyz language, 1/3 – in Russian, and about 5% - in Uzbek.

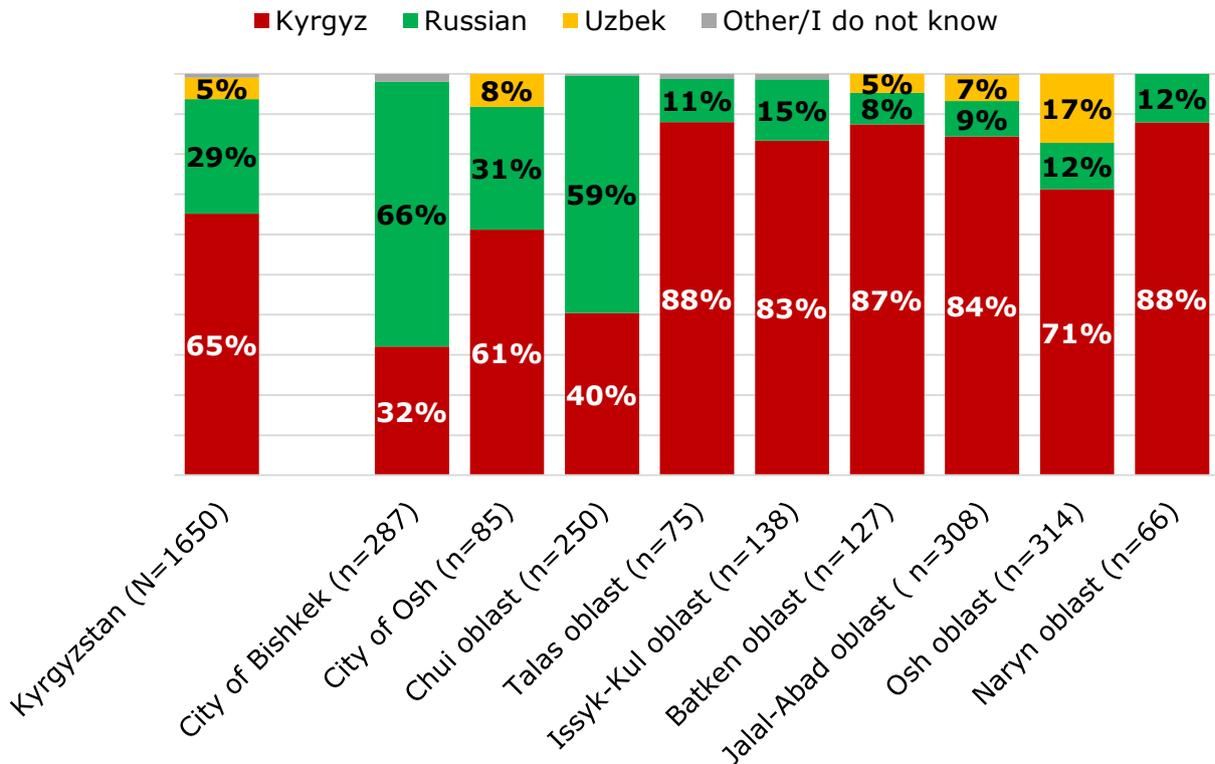
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Figure 3.8 What language do you prefer when you listen to the radio? N=2167, %



The oblast-based analysis (Figure 3.9) shows that the majority of the population of the city of Bishkek and Chui oblast, where most of the Russian-speaking population is concentrated, prefers listening to the radio in Russian. Accordingly, these areas have a greater number of radios broadcasting in Russian than other oblasts. Also, 1/3 of Osh residents prefer the Russian language when listening to the radio. The Russian language is to a lesser extent represented in the remaining oblasts, ranging from 8% in Batken to 15% in Issyk-Kul. The Kyrgyz language, being native to most of the country's population, dominates radio listening in all areas except for Bishkek and Chui oblast. The Uzbek language and the largest Uzbek-language radio audience are concentrated in Osh oblast and the city of Osh: 17% of radio listeners prefer to listen to radio stations in Uzbek.

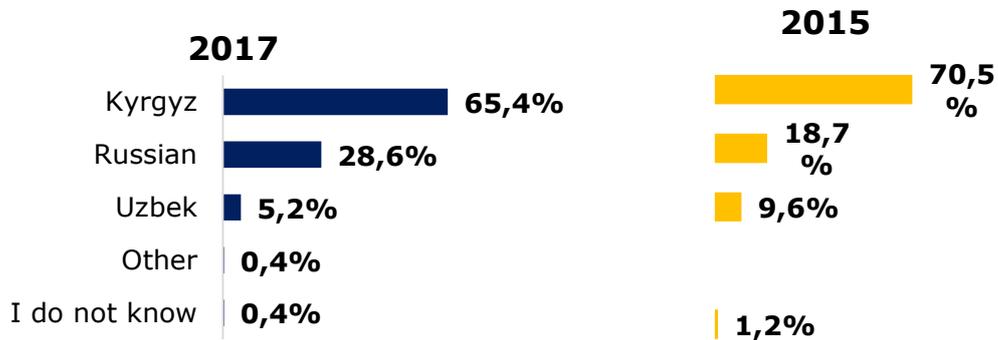
Figure 3.9 Preferred languages of radio listening, disaggregated by oblast, N=1650, %



The comparison between the 2015 and the 2017 waves shows changes in the preferences of the language of broadcasting: the number of Kyrgyz-speaking radio listeners decreased by 5.1%, Russian-speaking – by 9.9%, and Uzbeks – 4.4%.

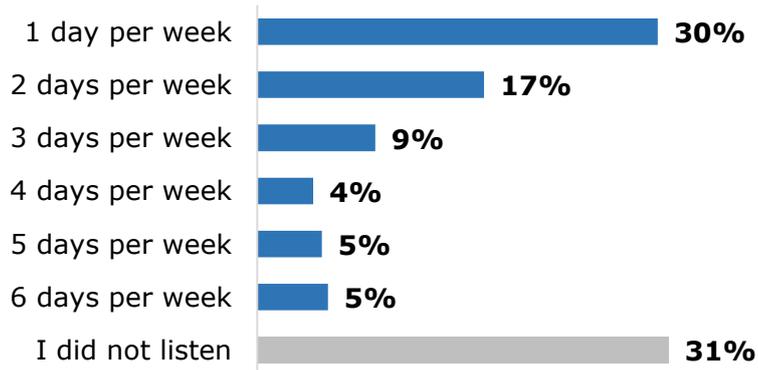
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Figure 3.10 Comparison between language preferences for radio listening in 2015 and 2017, N=1,650/1,842, %



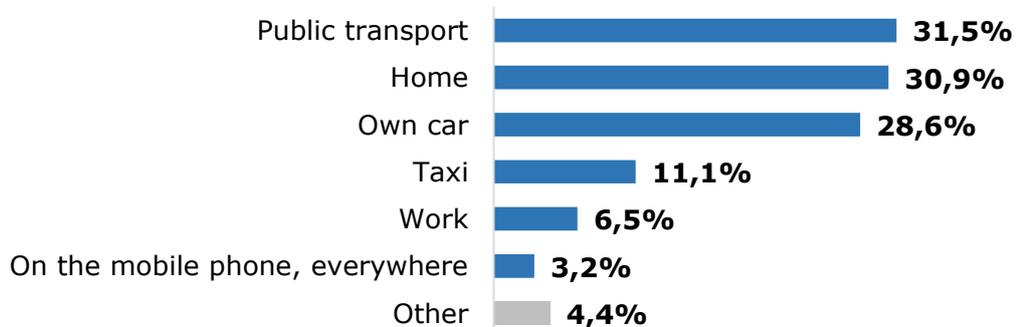
Respondents were also asked how many times they listened to the radio during the week preceding the survey (Figure 3.11). About 1/3 of them did not listen to the radio; as for the remaining 2/3 of respondents, almost every third of them listened to the radio once a week, about 17% listens to the radio 2 days a week, and only a small number of respondents listened to the radio more frequently.

Figure 3.11 How many days during the last week did you listen to the radio? N=1650, %



The most common places where respondents listen to the radio are public transport, own car and home. (Figure 3.12)

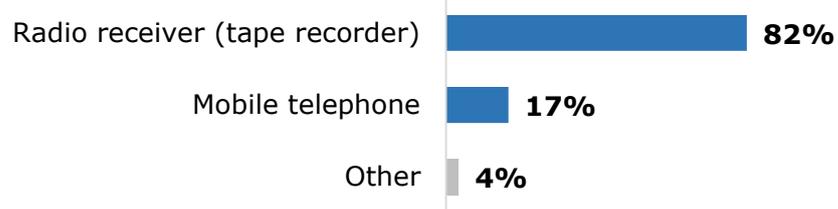
Figure 3.12 Places where respondents listen to the radio (several answer choices are allowed), N=1,650, %



Respondents more often listen to the radio using a radio receiver (82%), and about 17% use a mobile phone for this purpose.

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Figure 3.13 Types of devices used to listen to the radio (several answer choices are allowed), N=1,650, %



The "Other" category includes: computer, laptop, tablet.

About 18% of respondents among those who listened to the radio in the last 6 months listen to online radio and 82% do not.

The analysis of respondents who listen to the radio online shows no significant differences between genders, educational levels, types of settlement, frequency of listening to the radio and listening language. Nevertheless, there are differences based on the income, ethnicity and age.

Figure 3.14 shows that the young population is more likely to listen to the radio online (about 28% of respondents aged 14-17 years, and 27.1% aged 18-24 years). Also, most listeners of online radio are observed among the Russian-speaking population: about a third of representatives of Russian ethnicity listening to radio use the Internet for this purpose.

Figure 3.14 Respondents who listen/do not listen to the radio, disaggregated by age, oblast, ethnicity and income level, N=1,650, %

		■ Listen online	■ Do NOT listen online
Radio listeners		18,1%	81,9%
Age	14-17 (n=157)	28,0%	72,0%
	25-34 (n=419)	18,4%	81,6%
	45-54 (n=242)	12,2%	87,8%
	65 years and over (n=87)	9,0%	91,0%
		3,4%	96,6%
Ethnicity	Kyrgyz (n=1078)	16,8%	83,2%
	Uzbek (n=87)	30,5%	69,5%
Average monthly income	Up to KGS 10,000 (n=484)	17,1%	82,9%
	KGS 15,001 - 20,000 (n=203)	14,9%	85,1%
	KGS 30,001 - 40,000 (n=38)	15,8%	84,2%
	KGS 60,001 - 80,000 (n=20)	26,5%	73,5%
	Refused to answer (n=235)	40,0%	60,0%
		28,6%	71,4%
	24,3%	75,7%	
	17,5%	82,5%	

When turning on the radio, the population in most cases does this to listen to music (Figure 3.15). This criterion is used to choose a favorite radio. The second most important criterion for choosing radio is the availability and content of news. This criterion is the most important for a third of radio listeners. The third place with a fivefold difference from the news is taken by a talk show.

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Thus, the availability and quality of this type of program is important for 8.4% of respondents. Other criteria did not exceed the audience threshold of 2-3%.

Music, as the first criterion for choosing a radio station, has many styles with most popular and favorite of them represented in Figure 3.16.

Figure 3.15 Favorite type of a radio program* (several answer choices are allowed), N=1650, %

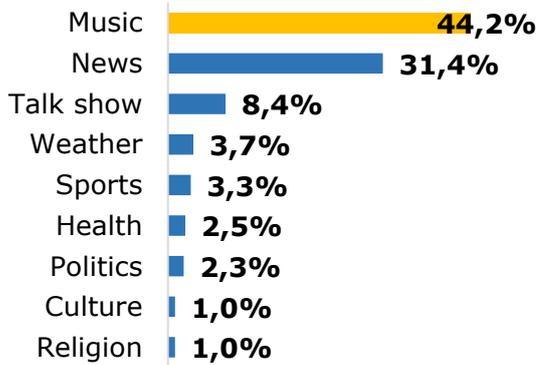
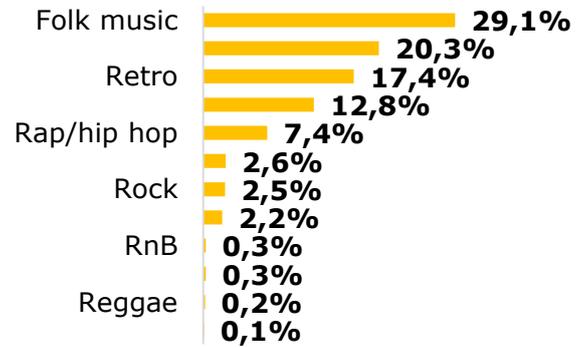


Figure 3.16 Favorite type of music* (several answer choices are allowed), N=1650, %



Most popular is folk music (folklore) or that played/sung by local performers with the latter being preferred by a third of radio listeners. The second place belongs to pop music, and the third one – to retro.

Media Indicators

As part of the media research, same indicators as for TV were estimated for radio.

Table 3.1 Media indicators applicable to radio

Average weekly reach	Average number of people listening to the radio at least once a week
Share	Share of time spent on listening a specific radio station at a specific time of the day in the total time of daily radio listening
Ratings	Share of listeners who listened to a particular radio station in a specific time interval or time of day as a percentage of the total population

Из показателей AWR, Share и Rating, важно сформировать общую картину, по которой

The analysis of the radio broadcasting market in international practice employs a number of indicators, as shown in the table above.

AWR, Share and Rating form an overall picture allowing advertising managers to make an objective assessment of the effectiveness of advertising budgets and estimate the cost of 1 (or 1,000) contacts with the target audience. It is very important to have not only a global picture of

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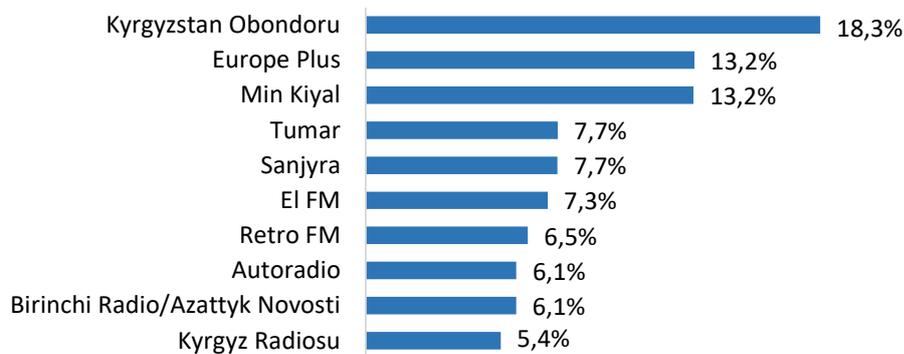
the station's rating, but also the information on the distribution of the audience in time, common hours and prime times.

The size of the radio audience, as well as the market share of the radio station are most significant indicators in the evaluation both for representatives of radio stations competing for listeners and for businesspeople who reach their target audience by advertising.

The analysis of the average weekly reach shows that the three leaders in terms of the size of the audience at the level of the whole of Kyrgyzstan include the following radio stations: Kyrgyzstan Obondoru, Min Kiyal, Europe Plus.

Every fifth radio listener prefers listening to the radio Kyrgyzstan Obondoru. The closest competitors are Min Kiyal and Europe Plus, sharing the second place across the country. The next group of radio stations, represented in TOP 10, accounts to from 5.4% (Kyrgyz Radiosu) to 7.7% (Tumar) of the population, and lags behind the leader by 3-4 times in terms of overall indicators for Kyrgyzstan.

Figure 3.17 Average weekly reach, TOP-10, KR, AWR%, N=2167



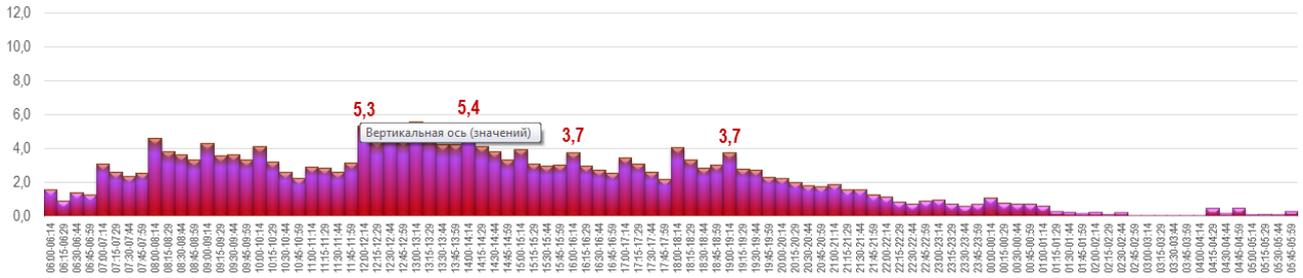
The dynamics of this indicator demonstrating the trend over a certain period is of more interest to the representatives of radio stations, as reflecting the effectiveness of their marketing activities and the potential of their market. After all, having information about changes in the dynamics for a particular radio station, one can make efforts as part of the advertising policy to air programs and music to maintain the rating or improve the position of the radio station.

Taking into account the qualitative indicator of the Share, the rating of radio stations changes. As can be seen in Figure 3.18, there is a larger drop of the Share of radio stations closing the top-five list - Sanjyra and Tumar. The leading three radio stations have the same sequence in terms of Share as for AWR - Kyrgyzstan Obondoru, Europa Plus and Min Kiyal. Sanjyra, being on the fourth place for AWR, is shifted to the seventh place when it comes to Share, while Tumar is on the 11th place. This means that these radio stations are listened to by a lot of respondents, but for the duration of the listening dropped. Their places are now taken by EI FM and Retro FM (fourth and fifth places, respectively).

Figure 3.18 Average daily share, TOP-20, and ratings of radio stations operating in Bishkek and Osh

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Figure 3.20 RATINGS (assessible radio audience), Kyrgyzstan, 2017



The breakdown of radio audience by time intervals at the level of Kyrgyzstan, Bishkek and Osh does not show any significant difference (Figure 3.21).

Figure 3.21 RATINGS (accessible radio audience), Kyrgyzstan, Bishkek, Osh, 2017



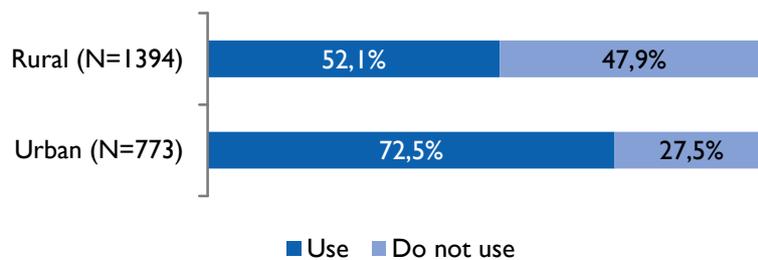
4. Internet Using Practices and Preferences

Modern technologies have become part of people's lives. The World Wide Web spanned most of the world, including Kyrgyzstan. Internet penetration level has a direct impact on the formation of population's media preferences of the population.

According to the survey, 59% of the Kyrgyz population uses the Internet. At the same time, the share of users of the world network is higher in northern oblasts than in the southern part of the country, which may be explained by the fact that 80% of Bishkek residents are Internet users. Bishkek residents have the opportunity to enjoy high-quality Internet connection, as there is a wide range of Internet providers in the capital and there is a competitive struggle for each consumer. The Internet is least used by users in Osh oblast, where the share of Internet users was 47.3% of residents. (Figure 4.1)

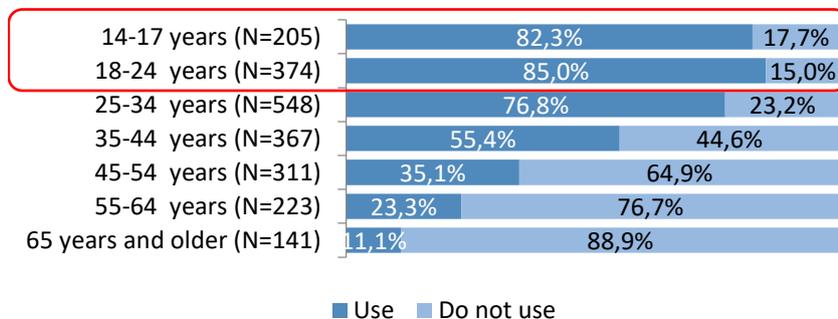
In addition, in rural areas, the frequency of using the World Wide Web is significantly lower than that in urban areas (52% and 73%, respectively), which may be due to the lesser representation of Internet sources in rural areas compared to urban ones. So, not all villages have access to the Internet, and villages that have Internet often work with a single provider.

Figure 4.1 Internet using practice, disaggregated by type of settlement (urban/rural), N=2 167, %



The share of Internet users among men and women is approximately the same. At the same time, the study revealed that the older the respondent, the less likely that he is an Internet user. Thus, the older generation is less inclined to use the World Wide Web than people aged 14 to 34 years, with about 80% of the latter being Internet users. We can assume that the adherence of young people to communication in social media, and the need to follow the world trends of new technologies and their features are the causes of this result. Only one in ten respondents aged over 65 years uses the Internet, which can be explained by the difficulties of mastering the technology allowing them to go online. (Figure 4.2)

Figure 4.2 Internet using practice, disaggregated by age group, N=2,167, %

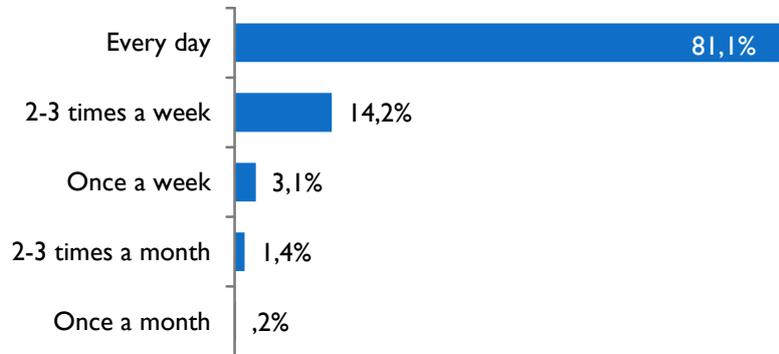


Despite the fact that about 40% of the population does not use the Internet in Kyrgyzstan, it has long entered and rooted in the life of Kyrgyz people: someone uses it daily, while others access the realm of unlimited opportunities and information flow from time to time. Irrespective of

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gender, type of settlement and oblast of residence, the absolute majority of respondents go online every day. The need for frequent use of the Internet arises is related to the communication in social media and the search for information. (Figure 4.3)

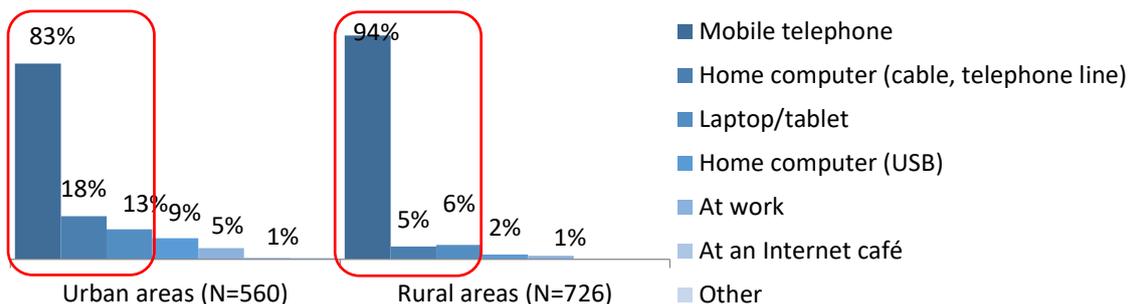
Figure 4.3 Frequency of using Internet, N=1,287, %



The frequency of using the Internet varies across age groups. Over 80% of the population under the age of 55 enters the World Wide Web every day.

Internet users have several ways to get access to the World Wide Web. The leading way is through a mobile phone / smartphone (89.3%). In rural areas, almost all respondents use a mobile phone / smartphone to access the Internet. In addition to mobile phones, 18% of respondents use a home computer to access the Internet in urban areas, with their share being only 5.4%. The penetration rate of fixed Internet communication is much lower in villages than in cities; this is the reason why the population does not have the opportunity to use a cable or telephone (fixed line) connection to access the Internet. Laptops, tablets, providing the possibility of accessing the Internet are used twice less often by rural residents than by urban residents (6.0% and 12.7%, respectively). The reason for this result can be the lack of this electronic technology in a larger number of rural residents. It is also worth noting that Internet cafes are no longer as popular as they used to be and have virtually disappeared, so that less than 1% of the population access the Internet at an Internet cafe (Figure 4.4)

Figure 4.4 Instrument used/place visited to access Internet, disaggregated by type of settlement (urban/rural), N=1,287, %



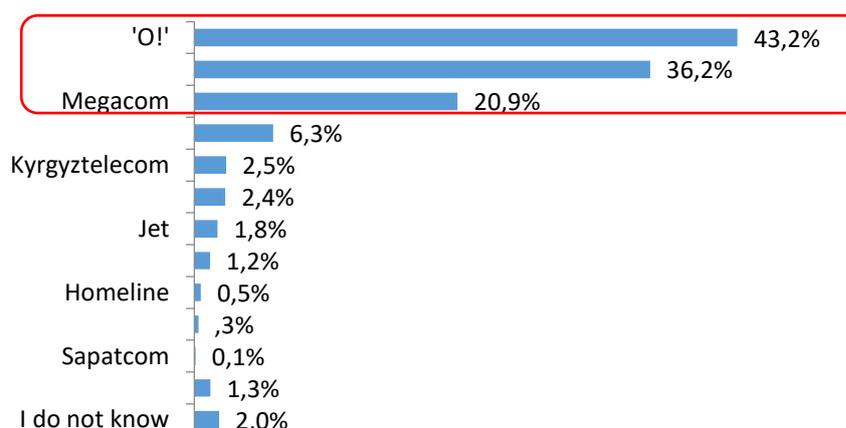
*Several answer choices are allowed

"Other": friends' laptop, attachment, wi-fi.

A device used to access the Internet must have an Internet connection provided by Internet providers. There are about two dozen Internet providers in Kyrgyzstan that create healthy competition in the market. Since mobile phones / smartphones are the main source of Internet access for the population, the top three providers are mobile operators, each of which providing Internet access services to 21-43% of the population (Figure 4.5).

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Figure 4.5 Internet providers, 1,287, %



When choosing a provider, in addition to the affordable price and high speed of the Internet, 20% of mobile Internet users prefer their mobile provider for quality communication without failures.

Due to the fact that the main instrument used to access the Internet is a mobile phone / smartphone, the leading providers of Internet in the oblasts are mobile operators. In the northern oblasts, Internet users are almost evenly distributed among providers O! and Megacom. In the southern oblasts, the majority of Internet users prefer Beeline, which serves 45% to 78% of consumers in each oblast. It should also be noted that the national telecommunications company Kyrgyztelecom provides access to the Internet to almost every tenth consumer in the cities of Osh, and Talas and Issyk-Kul oblasts. (Table 4.1)

Table 4.1 Internet providers disaggregated by oblast (Top 10), 1,287, %

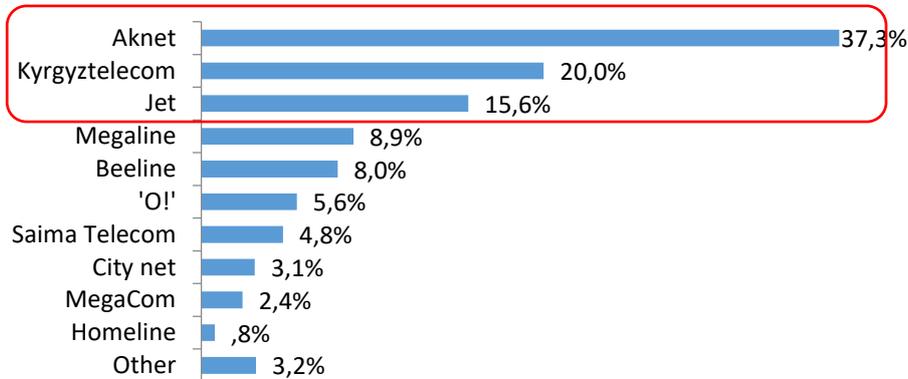
	'O!'	Megacom	Beeline	Aknet	Kyrgyztelecom	Megaline	Jet	Saima Telecom	Homeline	City net
City of Bishkek (N=291)	48%	23%	13%	20%	1%	10%	7%	3%	2%	1%
City of Osh (N=65)	23%	33%	45%	5%	9%		1%		1%	
Chui oblast (N=192)	54%	29%	14%	8%	4%		1%	3%	1%	
Talas oblast (N=49)	45%	42%	14%		7%		2%			
Issyk-Kul oblast (N=91)	73%	20%	17%		10%					
Batken oblast (N=87)	14%	13%	78%							
Jalal-Abad oblast (N=251)	39%	11%	64%		1%					
Osh oblast (N=204)	31%	18%	54%	1%	1%					
Naryn oblast (N=47)	70%	19%	17%		2%					

Users of cable and telephone (landline) Internet prefer AkNet. The national telecommunication company Kyrgyztelecom provides is chosen by a much smaller number of respondents. Every

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sixth respondent who has access to the Internet through a cable or landline phone is a consumer of the services of the Internet provider Jet. (Figure 4.6)

Figure 4.6 Internet providers, cable or landline, N=142, %



"Other": Skyline, Maxlink, Exnet

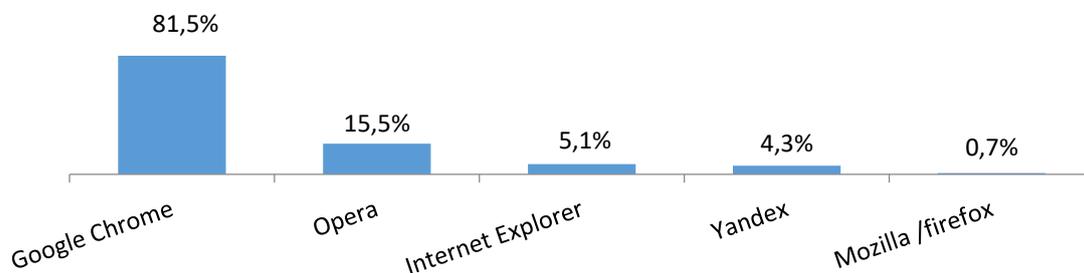
The population that has access to the Internet through a home computer in large cities can choose an Internet provider depending on their requirements. The choice of the provider is primarily determined by the affordable cost of the services. Thus, when choosing an Internet provider, about 40% of respondents were guided by the fact that the provider they chose provides access to the Internet at an attractive price, compared to other providers. A quarter of users preferred a certain provider because of the high speed of the Internet.

However, not all respondents can choose an Internet provider: some areas have only one provider, which is a monopolist. Thus, residents of these settlements do not have alternatives. Little less than a quarter of respondents said that there were no alternative options for accessing the Internet at their place of residence.

To be able to gain access to the World Wide Web, it is important not only to own a certain device that is connected to a certain Internet provider, but also to have a special piece of software.

Regardless of the place of residence, sex, age and source of Internet, the population chooses to use the browser Google Chrome (82% of respondents). This browser is one of the most recent ones (launched in 2008)⁴. Google Chrome meets requirements of consumers of Internet services, as it gives due regard to the current level of development of the World Wide Web and all sorts of software. It is also worth noting that despite the fact that the browser Opera is one of the older ones, every seventh Internet user continues using the same. (Figure 4.7)

Figure 4.7 Browsers used to access the Internet, N=1 287, %



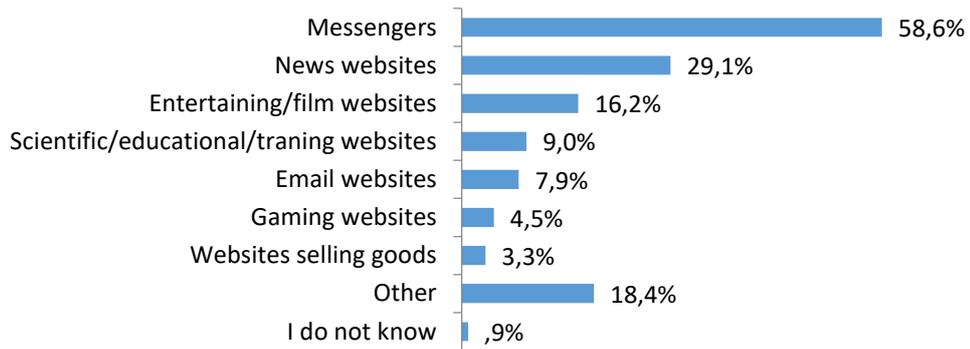
4

https://ru.wikipedia.org/wiki/%D0%A1%D1%80%D0%B0%D0%B2%D0%BD%D0%B5%D0%BD%D0%B8%D0%B5_%D0%B1%D1%80%D0%B0%D1%83%D0%B7%D0%B5%D1%80%D0%BE%D0%B2

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As for the purposes of using the Internet, the Internet space presents a lot of websites and applications for every taste each having a certain focus. Various directions form user adherence. Most often, Internet users use messengers, which provide a convenient and easy way to communicate with friends. Messenger applications also allow users to exchange files from any place with the only requirement of having access to the Internet. Significantly less often, Internet users visit news websites. The third most popular websites are entertaining and film web resources. (Figure 4.8)

Figure 4.8 Most often visited websites/applications, N=1,287, %



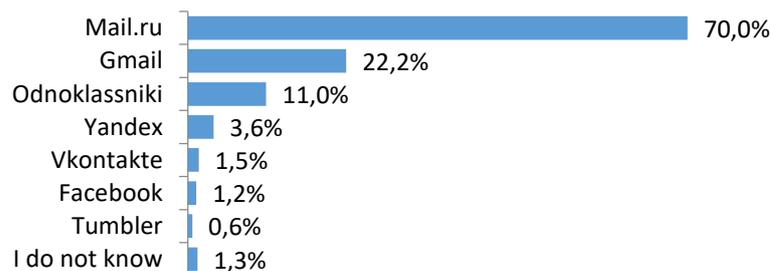
As mentioned earlier, most of Internet users use instant messaging applications. There is a variety of such applications in the world that attract users with their convenience, speed and relative affordability of communication. The study revealed that the absolute majority is using the WhatsApp application. Being a relatively new way of communication, the application is regularly updated, gaining an increasing audience in Kyrgyzstan. (Figure 4.9)

Figure 4.9 Most often used/visited messaging websites/application, N=753, %



Among the email websites, the most frequently used one is the Russian service Mail.ru. This mailbox has been operating for a long time on the Internet. With a significant lag, the second most popular is the more recent Gmail mail service, which attracts 22% of users of email websites. (Figure 4.10)

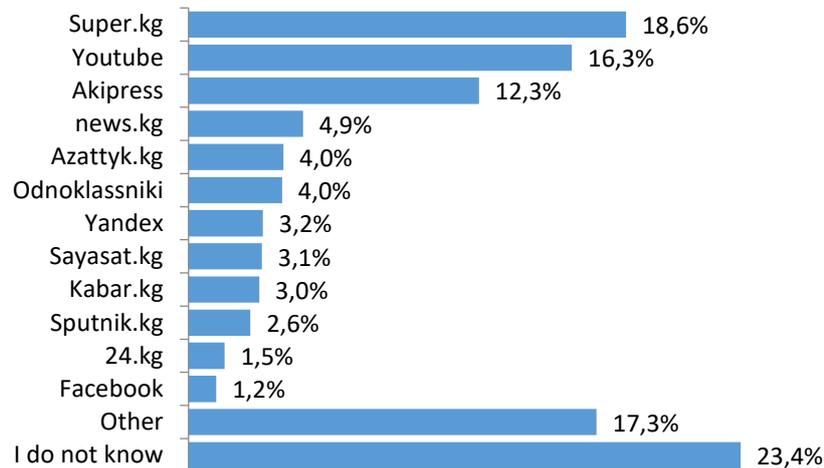
Figure 4.10 Most often visited/used email websites/applications, N=101, %



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There many websites on the Internet offering news content to their users. No specific leader was identified during the survey which would be used by an absolute majority of the audience. The websites mentioned by the respondents include Super.kg, Youtube and Akipress that have a larger audience. Each website has a specific audience guided by some objective reasons in their choice. (Figure 4.11)

Figure 4.11 Most often visited news websites/applications, N=374, %



As for the scientific and educational portals, the population in general chooses the search engine Google (21.7%) and Youtube (17.1%). The former helps to find websites containing information of interest. Search engines provide links to materials on any desired topic. The main feature of Youtube is the clear demonstration of how to solve a certain issue.

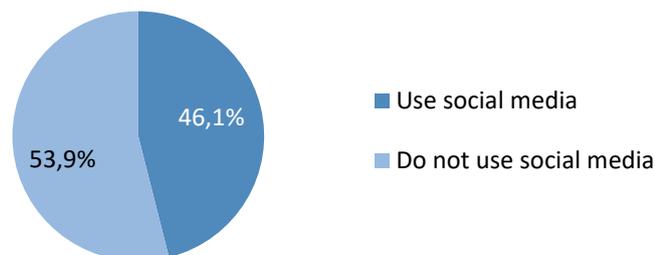
Customers who make purchases on the global network most often do this on the advertising websites Lalafo (37.9%) and Diesel (11.9%).

The population that uses Internet websites for entertainment and watching movies mainly prefers Youtube (57.8%). It provides videos s on virtually any topic.

Most of those who visit gaming websites download games from the Playmarket application (38.6%). The above website allows finding and installing any game you like on your gadget.

An equally important purpose of using the Internet is to communicate with relatives, friends and acquaintances through social media. The audience of particular social media had been growing steadily from year to year. According to the survey, about 46% of Internet users use social media (Figure 4.12).

Figure 4.12 Social media using practice, N=1,287, %

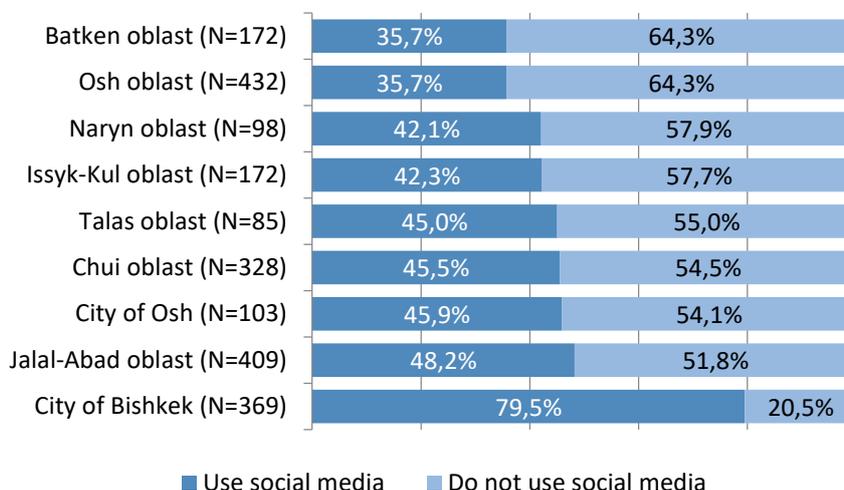


The share of social media visitors is much lower in oblasts than in cities (39.4% and 58.2%, respectively). Similarly to the type of settlement, one of the main factors affecting the activity in social media is the area of residence. According to the results of the study, the share of social

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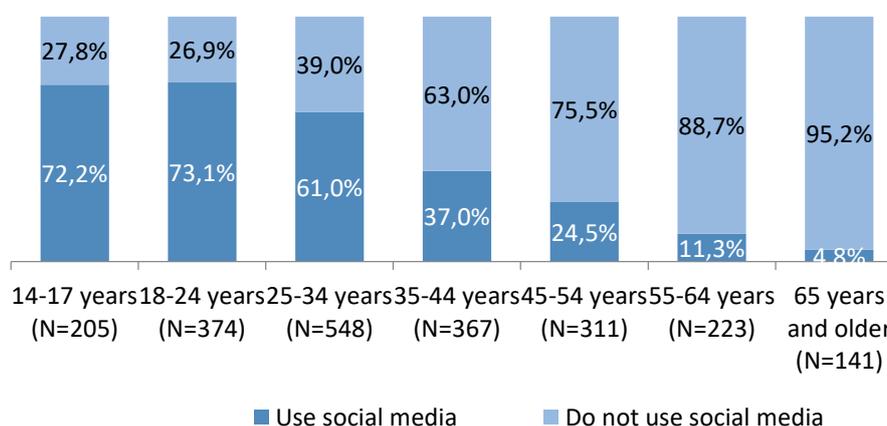
media users living in the north is much higher than that of southern residents (54% and 46%, respectively). First of all, this is due to a higher Internet penetration rate in the north. (Figure 4.13)

Figure 4.13 Social media using practice, disaggregated by oblast, N=1 287, %



There is also an increased likelihood of using social media among certain age groups. Thus, the older the person, the less often he/she is a user of social media. Population aged from 14 to 35 years is the main audience of social media. For modern youth, in turn, using social media is a common practice. They use social media for communication, shopping or entertainment. The older generation is more conservative in the ways of communication, shopping and entertainment. They continue following the customary life practices, which explains the low level of social media use among them. (Figure 4.14)

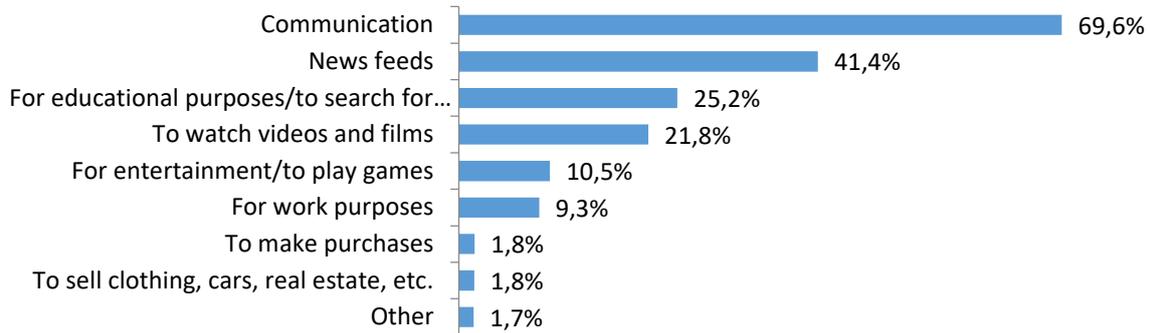
Figure 4.14 Social media using practice, disaggregated by age, N=1,287, %



Social media attract Internet users with a unique chance of enjoying the various features. Each web resource, pursuing a special purpose, provides unique services thereby forming the audience. Regardless of gender, age and place of residence, the main reason for using social media is communication (69.6%). Users choose social media as a relatively fast and inexpensive way of communicating even with people from other countries. Much less often, social media are chosen for news content. (Figure 4.15)

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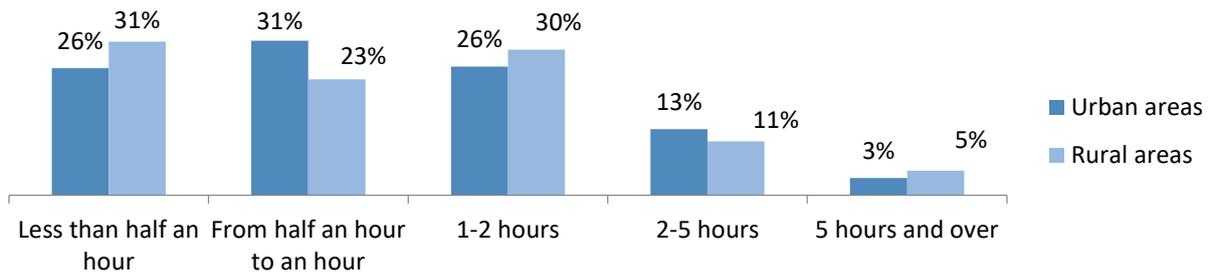
Figure 4.15 Purposes of using social media, N=999, %



"Other": various purposes, advertising

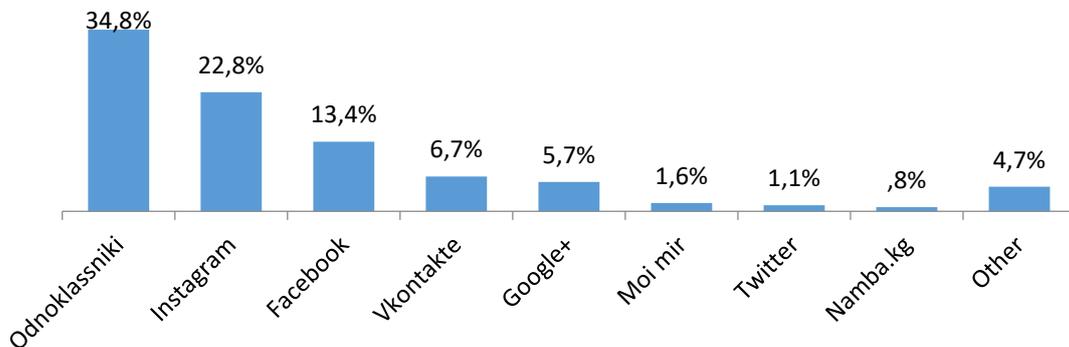
The average time spent on social media varies from person to person and depends on many factors. One of these factors is the type of settlement where users live. Residents of rural areas spend much less time in social media than urban residents. The duration of one visit for urban residents is less than half an hour, while urban residents can spend from half an hour to an hour using social media. In general, regardless of the age and gender, the main share of social media users spends up to 2 hours on social media. (Figure 4.16)

Figure 4.16 Time spent on social media per visit per day, disaggregated by type of settlement, N=999, %



The most popular social media are Odnoklassniki, Instagram and Facebook. Depending on gender, age and area of residence, the shares of users of particular social media are distributed among the three main websites, yet the rating remains unchanged. Odnoklassniki and Facebook attract users with the opportunity to communicate with people, share news and useful information. Despite the fact that both websites provide almost identical services, people prefer the website of Russian origin rather than that of American. Instagram provides different features allowing people to share photo and video materials. (Figure 4.17)

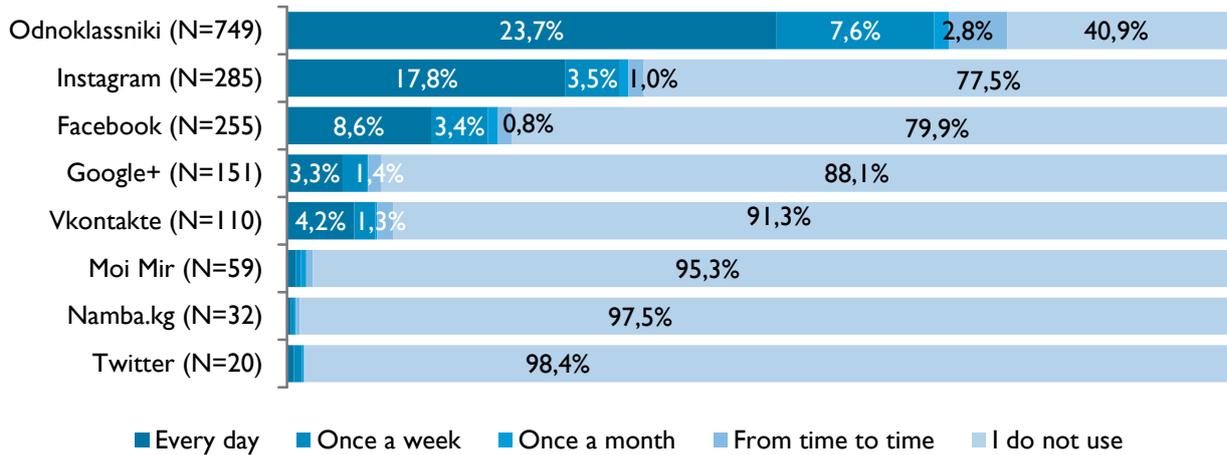
Figure 4.17 Practice of using various social media, N=2 167, %



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Users demonstrate varying frequency of using social media. Top three most popular social media are visited daily by the prevailing majority. (Figure 4.18) Comparison between daily audience of social media shows that Instagram users visiting the portal every day makes up the largest share (77.9%).

Figure 4.18 Frequency of using social media, N=2,167, %

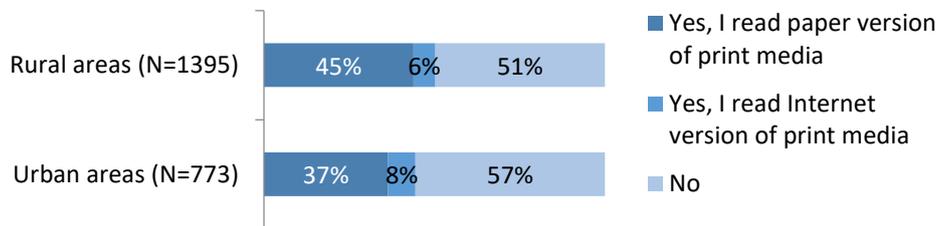


5. Print Media Preferences

Print media are one of the oldest sources of information. The print media once had one of the leading places among the preferred media sources, but eventually they gave way to newer and more advanced media.

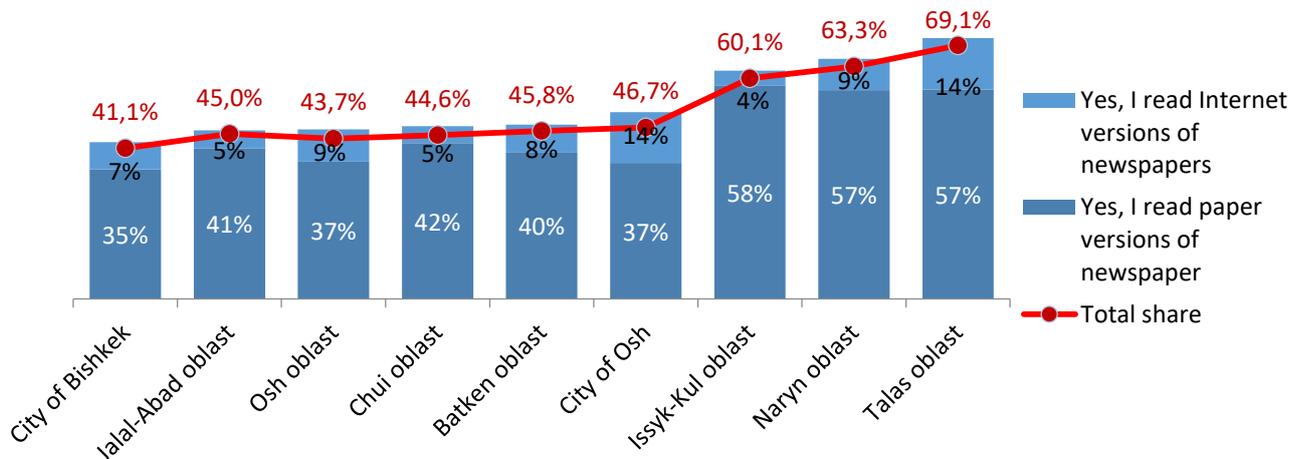
The media research revealed that the audience of print media is 47.1%. Residents of rural areas read newspapers more often than residents of urban areas (49.4% and 43%, respectively). This may be due to the lack of time in the urban population to read print publications. They prefer sources that can be used in parallel with doing other things, such as listening to the radio on the way to work or watching TV while cooking. This can also be explained by the fact that there are many print media aimed specifically at the female audience, while print media targeting males are fewer. It is also worth noting that the proportion of readers of Internet versions of print media is higher in urban than in rural areas for the possible reason of low penetration rate of Internet communication in villages. (Figure 5.1)

Figure 5.1 Readers of print media, disaggregated by type of settlement (urban/rural), N=2,167, %



The area of residence also affects the propensity of the population to read newspapers. The proportion of the population reading print media is higher in the northern than in the southern oblasts. First of all, this is due to the fact that the residents of the Talas oblasts were found to be the most active audience reading the print media (69.1%). The population of Bishkek and other northern areas, on the contrary, is the most passive audience of print media. Despite the great opportunities to read not only paper but also Internet versions of newspapers, the proportion of readers of online versions of newspapers among Bishkek residents remains below the average level throughout the country.

Figure 5.2 Readers of print media, disaggregated by oblast, N=2 167, %

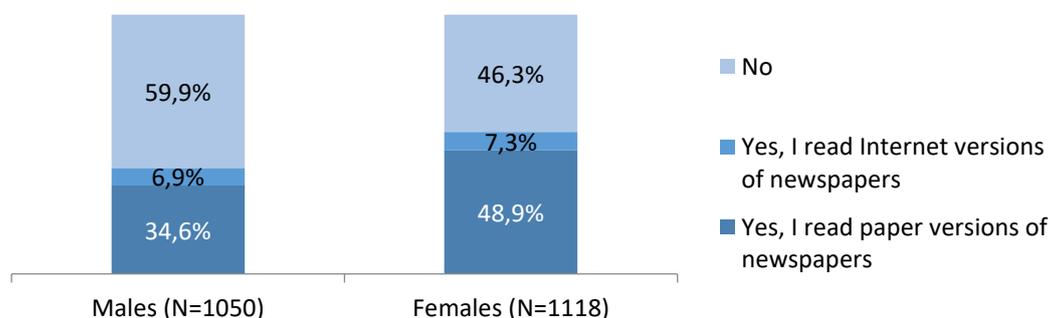


Another factor determining the propensity to read print media is gender. The proportion of women reading print media both on the Internet and as paper versions is higher than that of men. (Figure

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5.3) This result is fairly predictable, as researchers in many countries have concluded that women were more inclined to read such materials than men.

Figure 5.3 Readers of print media, disaggregated by gender, N=2 167, %



In addition, there is a dependence of the preference of print media on the age of respondents. Thus, the older the person, the more willingly he/she reads printed media. According to the research data, the majority of people aged from 35 to 65 years and older read print media. Moreover, there is a significant correlation between the age of readers and the preferred type of print media. People of middle and old age prefer paper versions of newspapers, while about 10% of adolescents and young people choose online versions of printed publications. (Table 5.1). The population aged 14 to 34 years finds it easier to go on the Internet from their gadget and read the necessary information; older people cannot always master modern devices and therefore it is easier for them to buy and read paper versions of newspapers.

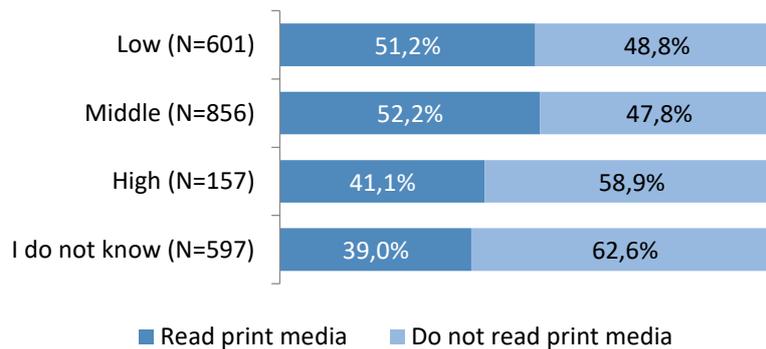
Table 5.1 Readers of newspapers disaggregated by age, N=2,167, %

Age	Yes, I read paper versions of newspapers	Yes, I read Internet versions of newspapers	Total
14-17 years (N=205)	33.1%	7.6%	39.0%
18-24 years (N=374)	31.4%	10.2%	38.0%
25-34 years (N=548)	35.5%	10.4%	43.3%
35-44 years (N=367)	49.9%	6.0%	55.1%
45-54 years (N=311)	49.1%	42%	51.9%
55-64 years (N=223)	51.9%	3.9%	53.9%
65 years and older (N=141)	56.3%	0.3%	56.5%

The level of monthly per capita income influences the preference for receiving information from print media. In accordance with the results obtained, people with an average income of KGS 2,500 to 10,000 per family member most often read the print media. Respondents with high incomes and those who found it difficult to answer, do not often use such sources of information.

Figure 5.4 Readers of print media, disaggregated by income level, N=2 167, %

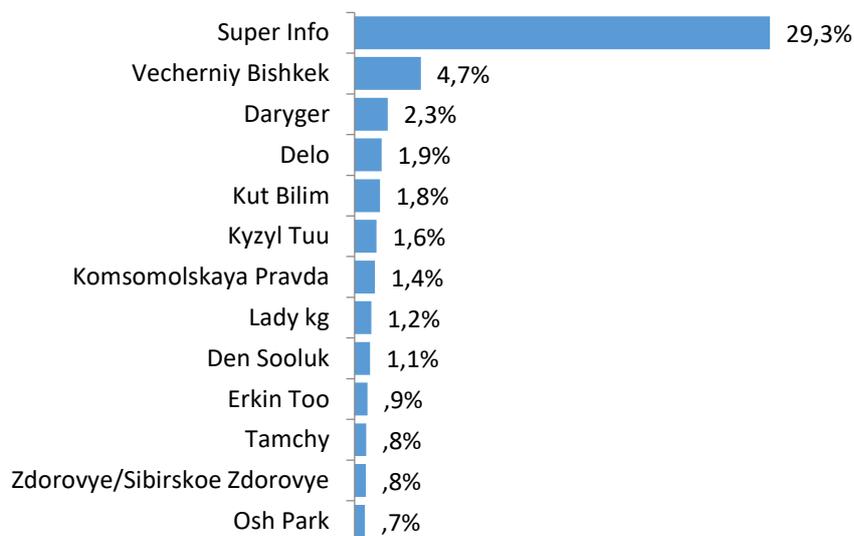
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Print media of Kyrgyzstan are represented by a wide range of publications that can satisfy the expectations of readers. Over 29% of the population prefers reading Super Info. This newspaper is interesting for both young and older generation, as its content covers serious political and economic topics and is entertaining at the same time. The second most popular newspaper is Vecherniy Bishkek, which is read by about 4.7% of all respondents. (Figure 5.5)

At the same time, there is a significant audience of local publications. For example, Talas Turmushu in Talas oblast, Batken Tany in Batken oblast, Selskaya Nov' in the Moscow district of Chui oblast, etc. Local print media are interesting to the people, as they cover topical issues relevant to their place of residence.

Figure 5.5 Most read print media, N=2 167, %



Besides to the popular newspaper Super Info, the media Vecherniy Bishkek also has a significant share of the print media audience in the northern region of Kyrgyzstan (18.9% among readers of newspapers) and urban residents. In rural areas, the second most popular newspaper is Daryger.

According to the data received, 42% of all respondents read paper versions of newspapers. 54.5% of such readers share them with other people for reading with great pleasure. At the same time, the average number of people with whom readers share newspapers is 3 people. Thus, thanks to active readers who buy newspapers, passive ones also read them with the actual audience of print media being higher than the total circulation of sold newspapers.

Print media provide an opportunity for their readers to choose the language of reading. Regardless of the version, the main preferred language is Kyrgyz. However, about 35% of readers of online versions of print media prefer Russian-language publications and about 6% - Uzbek-language

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publications. At the same time, the overwhelming majority of rural residents prefer printed publications in the Kyrgyz language, while the choice of urban residents is almost evenly divided between Kyrgyz-language and Russian-language publications. (Figure 5.6)

Figure 5.6 Newspaper reading language, disaggregated by type of settlement (urban/rural), N=1,021, %

