AFGHAN MEDIA IN 2010

A comprehensive assessment of the Afghan media landscape, audience, preferences and impact on opinions

Main Findings
October 13, 2010

Contents

INTRODUCTION

➔ Objectives of the study:

1. Produce a **comprehensive analysis of the Afghan Media landscape** in 2010, after 8 years of steady development

2. Identify **drivers of opinions and behaviors in the Afghan society**, and the expectations of Afghans in terms of information

3. Identify **areas of opportunities** to accompany future investments in media development

4. Provide USAID DG with a specific review of media penetration, perception and opportunities in with **a focus on 16 priority districts**

➜ **Timeframe: March – August 2010**

➜ **Methodology**

- ■ Media landscape research, through **350 Key informants interviews**, literature review, direct observation
- ■ Quantitative research: **6,648 interviews over 107 districts, 34 provinces** (priority districts, general survey)
- ■ Qualitative research: **250+ individual in-depth interviews**, with 96 paired interviews, 10 community case studies
- ■ Audience research: **Daily interview over 8 days with 1,700** respondents, giving about 13,000 data points
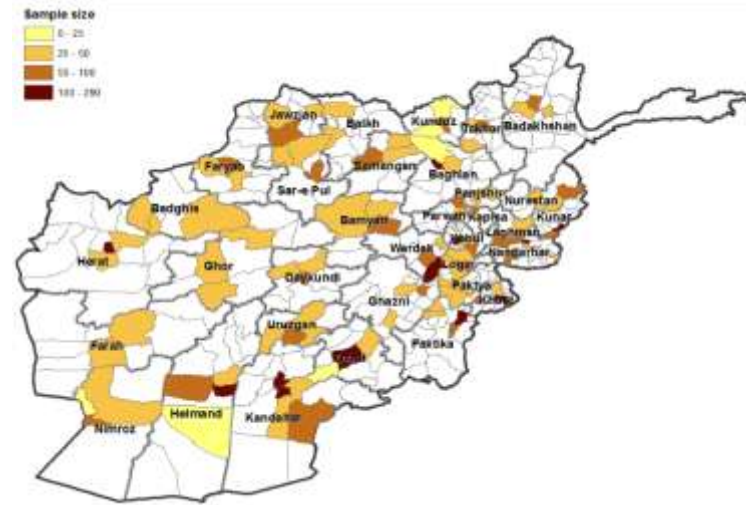
➜ **A series of public outputs**

- ■ A **comprehensive report**, covering media landscape analysis, audience analysis, and areas of opportunities.
- ■ 16 priority **district reports**.
- ■ Media actors database; **wiki**
- ■ Full **datasets** and methodology

➜ Online library on

www.altaiconsulting.com/docs/media

Districts sampled
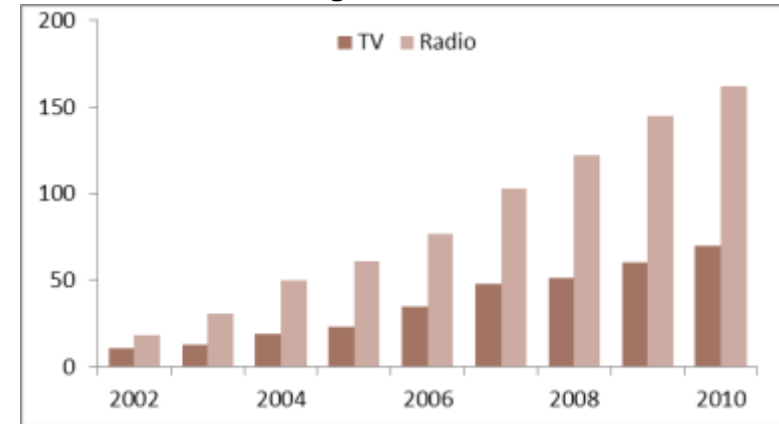

Media outlets database

- 2,000 individuals interviewed in 16 districts:
  - 5 main cities: **Mazar, Herat, Kandahar, Kabul, Jalalabad**
  - 2 smaller cities: **Lashkar Gah** (Helmand), **Khost** (Khost)
  - 9 rural districts: **Garmser**, and **Nad Ali** (Helmand); **Arghandab** and **Spin Boldak** (Kandahar); **Sarkani** (Kunar); **Khogyani** (Nangarhar); **Sorubi** and **Urgun** (Paktika); and **Saydabad** (Wardak)

- 25 field interviews and 75 phone interviews per district
  - Exceptions: main cities (increased sample), Garmser and Nad Ali (no phone)

- 10 KIIs (media outlet staff, officials, community leaders), media checklist, field checks

- One report per district

Province	District	Field	Phone	Total
Balkh	Mazar-e Sharif	190	0	190
Helmand	Garmser	25	0	25
Helmand	Lashkar Gah	25	75	100
Helmand	Nad Ali	25	0	25
Herat	Herat city	190	0	190
Kabul	Kabul city	290	0	290
Kandahar	Arghandab	25	75	100
Kandahar	Kandahar city	190	0	190
Kandahar	Spin Boldak	25	75	100
Khost	Khost city	25	75	100
Kunar	Sarkani	25	75	100
Nangarhar	Jalalabad city	190	0	190
Nangarhar	Khogyani	25	75	100
Paktika	Sorubi	25	75	100
Paktika	Urgun	25	75	100
Wardak	Saydabad	25	75	100
Total		**1,325**	**675**	**2,000**

I. MEDIA LANDSCAPE

➔ **An impressive growth of the sector**

■ More than **20% annual** growth in number of outlets per year since 2006

■ **9 TV channels and 20 radio stations** created per year

■ With **very limited input** from the International Community

➔ **Resulting in a dense media landscape**

■ Over **75 active TV channels and 175 radio stations** have been identified

■ A few **hundreds print media**, most of unknown status, and a few dozens websites

➔ **Media sector is becoming a large industry**

■ Between **$75m and $100m revenue** per year

■ 50% driven by **advertising** revenues ($50m)

■ Profits between $30 and $50m/year, but sustainable profit (advertising) ~ $15m/year

Outlets growth, 2002-2010

Media sector revenues (2010)

Estimated range of revenues: $77-96m /year

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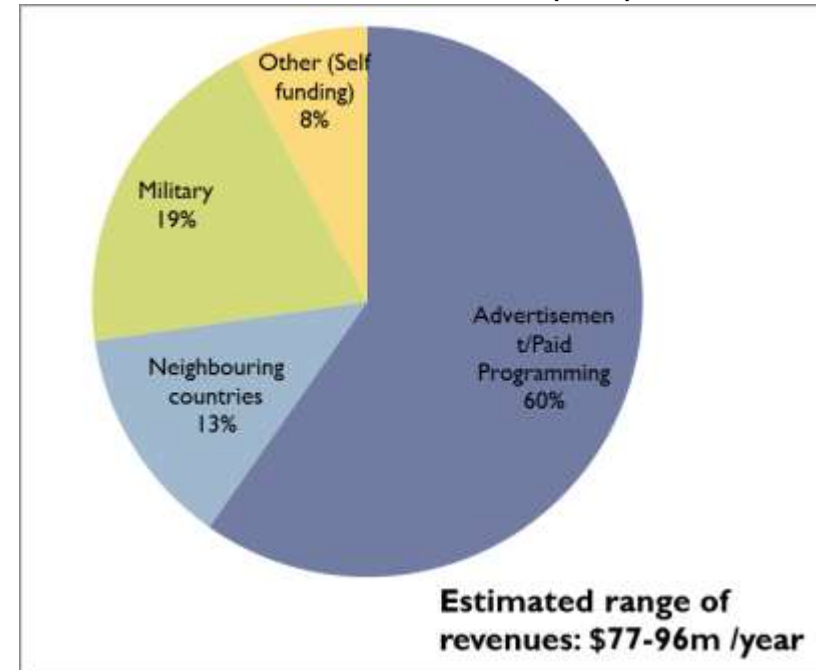
→ ## The sector is professionalizing

- **Regulatory environment making good progress**: media law and regulation institutions
- Numerous **services to media** develop: production, monitoring, advertising agencies, media placement
- **The quality of contents**, locally produced shows and even dramas **improved dramatically**
- Estimated **10,000 staff** involved in the industry, 2000 journalists currently being trained.

→ ## Emergence of serious investors & networks

- Diversified **media groups**: Moby, Ariana, Killid
- "National" networks: Yak, Killid, Ayna, Watandar

Tolo's rebranding campaign (Sept. 10)

"TOLO's new look reflects the growing sophistication of our audiences, who are increasingly demanding of a contemporary look from the organizations they engage with. It also resonates with the attitudes that will take our country forward - healing, hope, regrowth and regeneration." (Press release)

Outlets expenditure breakdown

Content 52%
Equipment 19%
HR, non prod 9%
Electricity 10%
Other 6%
Taxes 4%

Estimated total expenditures: $45m/year
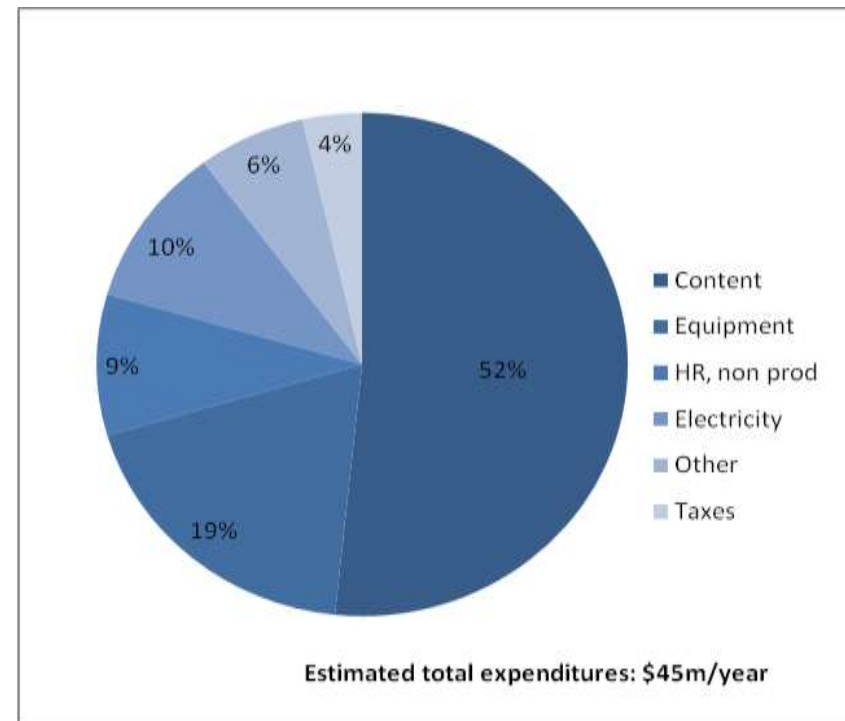
➔ Main cities are close to saturation:

- Kabul's radio spectrum is going towards saturation: **30 TV channels, 42 radio stations**

- ATRA has assigned all available frequencies in Kabul

- Herat, Mazar-e-Sharif have 10-15 TV channels (3 local), ~20 radio stations (12 local)

- Smaller **provincial capitals** typically **1 to 3 local radio** stations, **1 local TV**, 1-2 national networks

➔ In urban centers television taking the lead on radio

- TV and FM radio networks' broadcast strategies follow the same pattern as GSM equipment: main cities first, then smaller provincial capitals

- TV usage is closely **correlated to availability of grid electricity**

➔ A number of rural areas are still under-covered

- Rural district capitals and villages usually do not have anything besides AM / SW radio stations

Identified radio and TV transmitters

Radio transmitters
- 1
- 2-5
- 5-10
- 10-30
- 20-50

TV transmitters
- 1
- 2
- 3-5
- 5-10
- 10-43
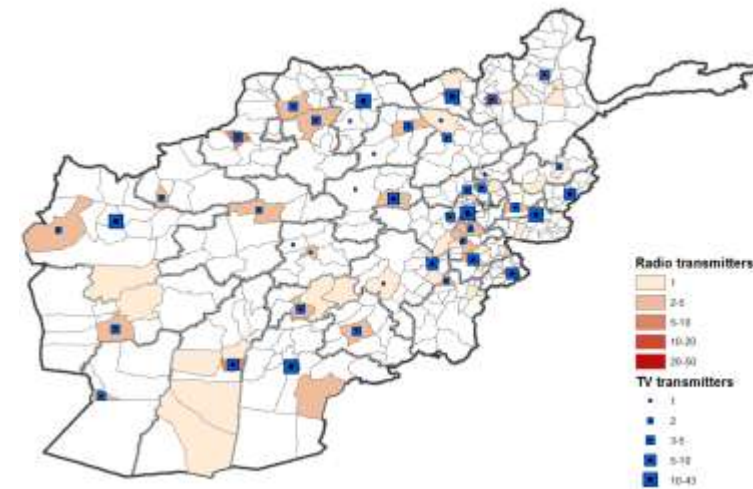
→ Emergence of political parties-backed channels

- **Noor** (Rabbani, Jamiat-e-Islami), **Rah-e-Farda** (Mohaqiq, Hezb-e-Wahdat); **Negah** (Khalili), **Noorin** (Fahim), **Ayna** (Dostom)

→ New religious channels

- Tamaddon, Kawsar, Dawat, Emrooz (now shut down)

→ Perceived Foreign influences

- Pakistan (Shamshad)
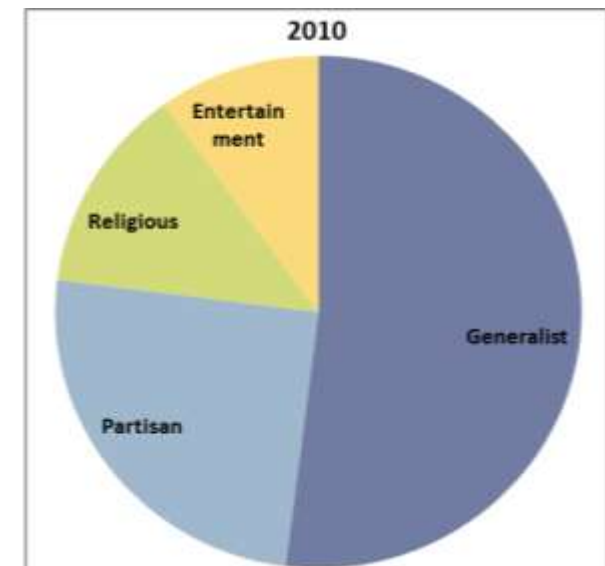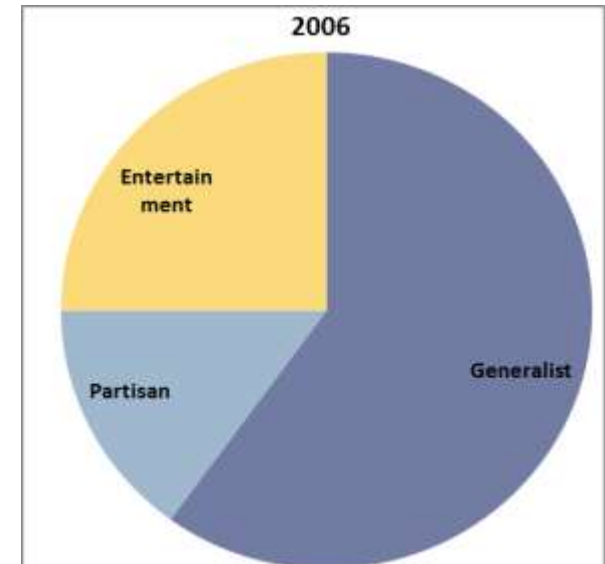- Iran (Tamaddon, Emrooz, etc.)
- Western media (BBC, Azadi, Ashna, etc.)

→ Foreign military media

- Sada-e-Azadi and over 100 smaller radio stations

Orientations of outlets

2006

Entertainment
Partisan
Generalist

2010

Entertainment
Religious
Partisan
Generalist

→ Media environment still requires attention

■ Multiple **influences** and self-censorship
■ Judicial efforts needed (not only legislative)
■ **By-laws to be finalized** and slow RTA transformation process
■ **Geography and security constrain** the development of the sector

→ Print outlets are suffering from a shrinking market

■ Struggling to find a market and become financially self-sustainable (to a greater degree than broadcast media)

→ Human resources / skills to be strengthened

■ Generally **weak investigative skills** of journalists
■ Weak solidarity/united journalist front
■ **Limited technical capacity** to address maintenance of equipment
■ **Poor managerial skills** hamper advertising and capacity to business development

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Media war: Tamadoon vs Emrooz

In 2008, Ayatollah Mohseni and Member of Parliament Najibullah Kabuli entered into a fierce controversy that lasted several months, through their respective channels, Tamaddon and Emrooz. They exchanged accusations of spying, working against Islam and being bought and paid by foreigners (the Iranian Revolutionary Guard and the CIA, respectively).

"Journalists just wait for accidents to happen and report on them…there is not much research going on"

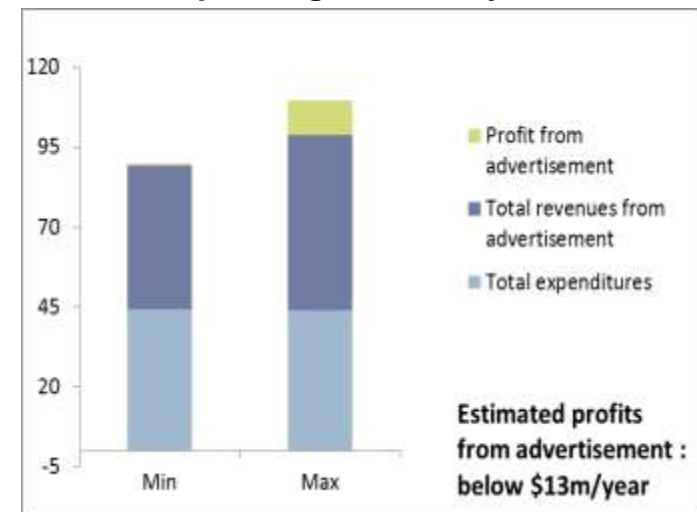(NGO supporting media in Herat)

Indian movies DVDs on the bazaar

➔ Content provision is slowly developing

- **Content mostly internally produced** by outlets, with variations in quality (cheapest option)
- **Production agencies on the rise** (Awaz, Kaboora, Awanama) but media groups don't have a sub-contracting culture
- Still significant role of **cheap purchases** at the bazaar

➔ Advertising : strong development but structural concerns

- A small, **concentrated pool of advertisers** (banks and telecoms)
- Highly integrated functions (media providers, production, placement, monitoring)
- Irregular/non-institutionalized generation of knowledge: **informal media placement** and various ideas of a 'successful' outlet
- 'Rules of engagement' include **kick backs and commissions**

Estimated profits generated by the media

Profit from advertisement

Total revenues from advertisement

Total expenditures

Estimated profits from advertisement : below $13m/year

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II. AUDIENCE AND PERCEPTIONS

→ # TV is gradually replacing radio in urban areas

- **Radio** is still leading, with **2/3 Afghans** regular users. Particularly strong in rural areas
- TV equipment rate reaches nearly half the sample
- **High TV** equipment rates **in urban area** (87% equipment & usage, with 77% daily usage)
- **TV picking up in rural areas**: 34% equipment / 37% usage but only 22% daily

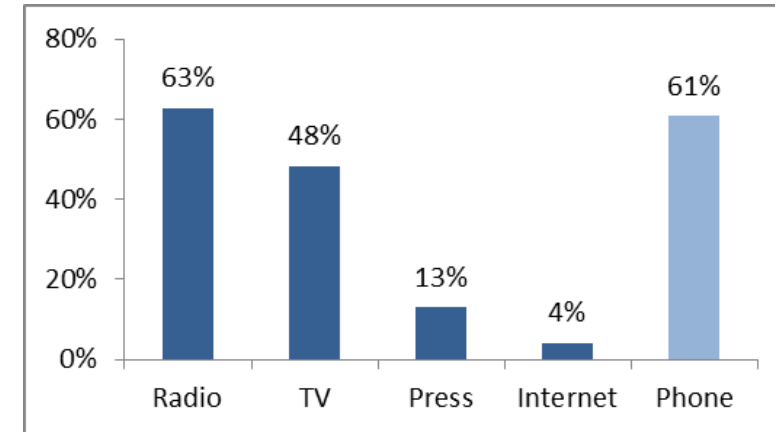→ # Similar consumption patterns (evening peak)

→ # Print media usage is structurally limited, and tends to decrease

- Limited by low literacy (30% m / 15% w), lack of access (limited distribution, except. ISAF paper)
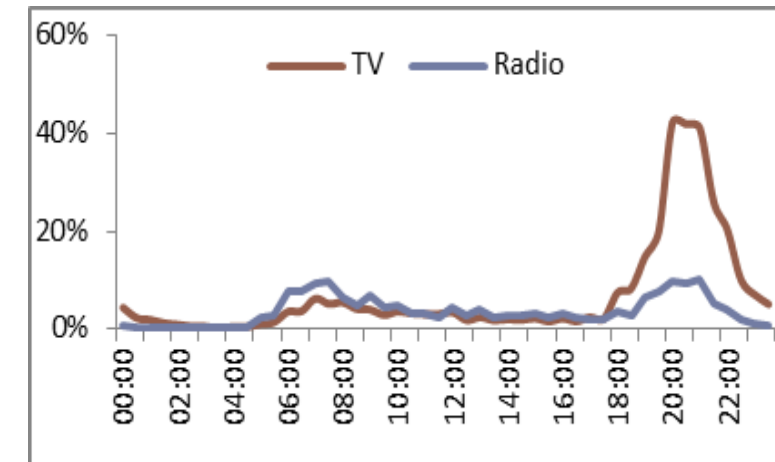
→ # Internet usage is increasing slowly:

- cost is prohibitive (slow connection makes the perceived cost high), access limited to main cities
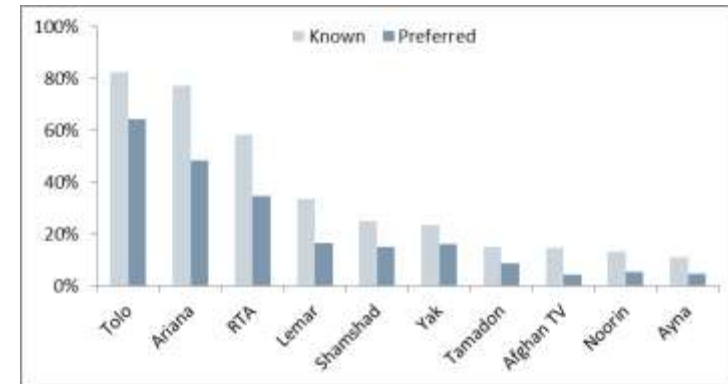
Usage rates

Usage vs. time of the day

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→ **Tolo** is by far the largest player (45% audience)

- When Lemar is added, **Moby Group controls more than half** the audience share.

→ **Ariana** is second, appreciated as a "serious" channel

- First in some Pashto-speaking areas: Helmand, Laghman, Paktika, Paktya, Samangan, Sari Pul, Uruzgan, and Zabul

→ **RTA** (public network) comes third with a 7% share

- Despite governmental control, the group is seen as fostering national unity: it's seen as the "TV of all Afghans".

→ **Yak TV** is positioning itself as a contender

- Launched early 2010 it already reaches 5% market share

→ Among **Pashto-only channels, Lemar** comes first, and dominates the south

→ A few **local independent** channels reach significant market share

- Hewad (Kandahar, 15%), Noor (Ghazni, 11%), Arezo (Balkh, 9%)

Most known and preferred media

Audience shares

→ **Example: Tolo**

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Preferred / most watched programs

→ **2/3 of audience share go to entertainment programs, with nearly 50% for serials**

- Self-declared preferences and most-watched programs are different from observed audience shares: **national news and religion are more *claimed* to be watched** than *actually watched*

- Possible explanations: psychological effect, duration, dataset limitations, but most likely, **at primetime, only entertainment programs are on**

→ Insights of qualitative research: people want more of

- Religious programs
- Good educational and cultural programs
- Afghan dramas and generally, culturally sensitive content
- Positive news, notable achievements of average Afghans
- Politics shows and debates are difficult to understand, and sometimes the tone is not quite right, but their role is acknowledged

Audience share

➔ Preferences and audience reflect a more atomized landscape and the weight of local stations:

- 105 stations share a third of the audience
- The first group, RTA, is actually 32 stations (sub-national)

➔ Strongest stations are naturally the ones having a largest broadcast range:

- **Radio Afghanistan, Azadi, BBC, Ashna** broadcast on AM (and sometimes FM in main cities), covering the most rural areas
- Arman and Killid (Ariana and Watandar to an extent) broadcast in the main cities with a significant audience
- **The combination of national and local** content production (Killid, RTA, Salam Watandar) generates audience and trust in regional centers

➔ Some local stations remain key players in their coverage area:

- Up to 54% audience share in their province, some even score 1-2% of the national audience share. The local station **Paktya Ghag** has an audience comparable to the network Ariana
- However, **all are not successful** in their area: in many cases, Azadi, BBC or Killid are preferred to the local station

Preferred / most listened to

Audience share

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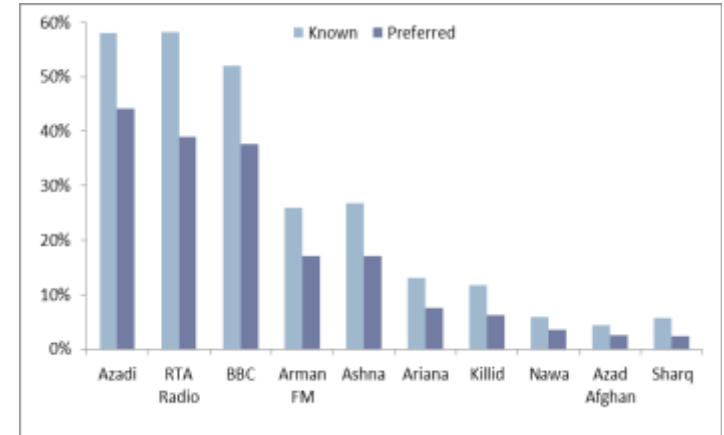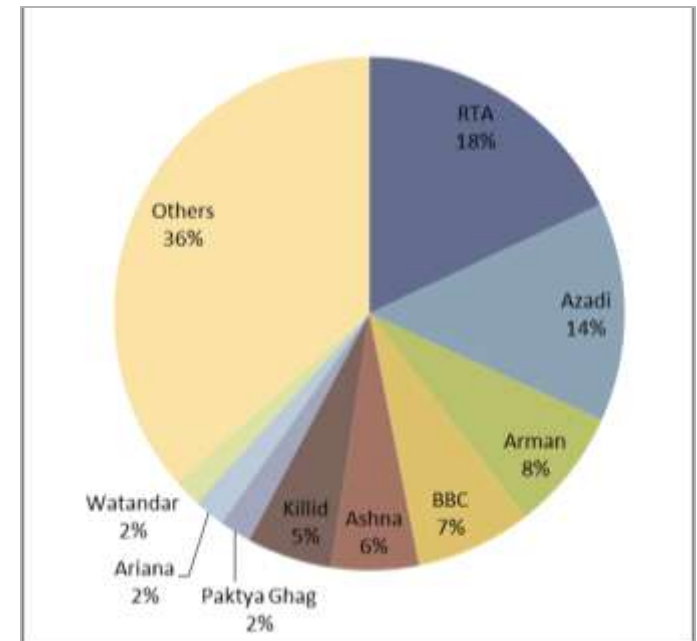
→ Cultural objection to television is receding, but is still a challenge for women, and a better quality of content is expected

- General **rejection** of TV, already minor in 2005, it is now becoming **marginal**
- While there is nearly **no opposition in principle**, TV is often harshly **criticized as being superficial, broadcasting un-Islamic programs, and not as useful as it should be**
- As a consequence, TV can be considered harmful, and the majority think children and women should not watch TV without supervision

→ Comprehension is less an issue than it was observed in 2005

- Literacy is still **problematic for press and internet**, preventing many to access these media
- Non-vernacular language and pronunciation are problematic in **some areas**, particularly for native Turkmen and Pashaïe speakers
- Most comprehension issues are coming from **complex terminology** and concepts

Should everyone be allowed to watch TV? Without supervision?
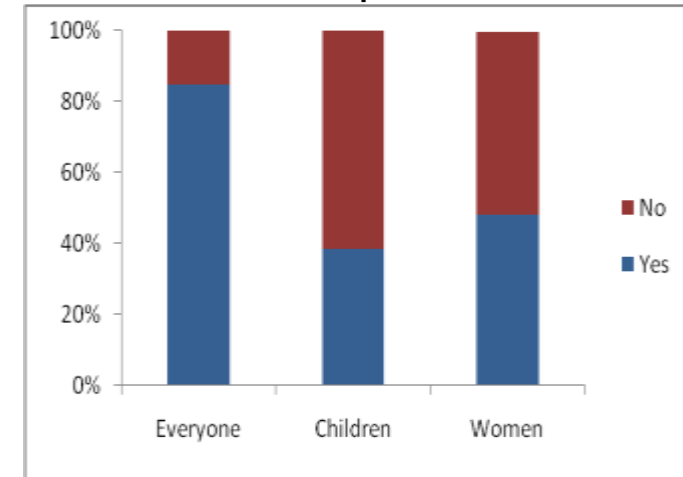
What kind of difficulties

19
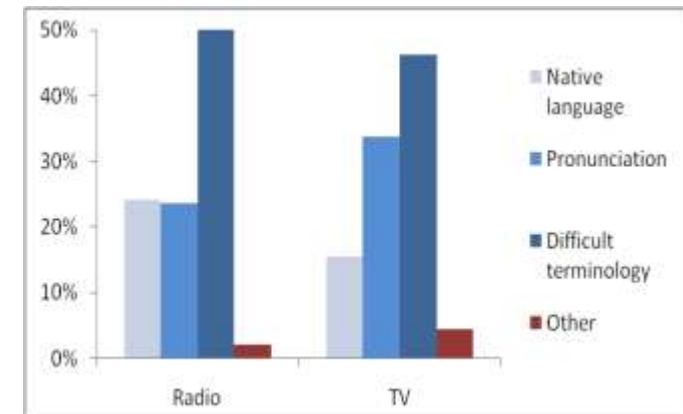
➜ Media in general are a primary, and trusted source of information.

- They are the most trusted source on all topics tested but religion, for which the mullah is more trusted

➜ But Afghans keep a critical mind

- Television is **not trusted by all**: for some, it is either too politically oriented or driven by commercial interests

- **Political and military media** are recognized and known as such – which does not mean they are not used, but that they are **consumed skeptically**

- Afghans try to **confirm** the most important information **through personal connections**, phone calls, and use several media sources to confirm the information

Most trusted source on some topics (one choice)

Topic / most trusted source	International news	Afghan news	Local news	Health	Politics	Religion	Development projects
TV	39%	36%	33%	31%	35%	26%	27%
Radio	38%	46%	45%	33%	34%	21%	31%
Mullah, mosque	3%	1%	1%	1%	1%	39%	1%
Family, friends	1%	4%	1%	1%	0%	1%	1%
Newspapers	1%	1%	1%	0%	1%	0%	1%
Shopkeepers / bazaar	0%	0%	1%	0%	0%	0%	0%
Shura	0%	0%	0%	0%	0%	0%	9%
Khan, malik, commander	0%	0%	2%	0%	0%	0%	3%
Taxi drivers	0%	1%	0%	0%	1%	0%	0%
Expert	0%	0%	0%	20%	1%	0%	0%
Book	0%	0%	0%	1%	3%	6%	0%
Internet	0%	0%	0%	0%	0%	0%	0%
No interest	18%	11%	17%	11%	24%	7%	27%

Do you trust television?

- Not at all: 5%
- Not much: 40%
- Mostly: 46%
- A lot: 9%
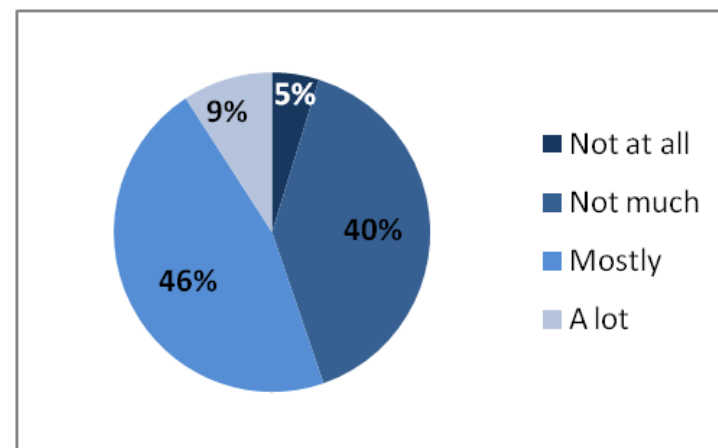
➔ **Although most media offer a way to interact with the public, this is marginally used**

- 85% of radio listeners, 90% of TV viewers have never interacted with any media; essentially for lack of interest
- Only 1-2% of users interact with radio or TV

➔ **When they do interact, it is:**

- Mostly to request **songs**, sometimes to ask a **question**
- Mostly on **local media**
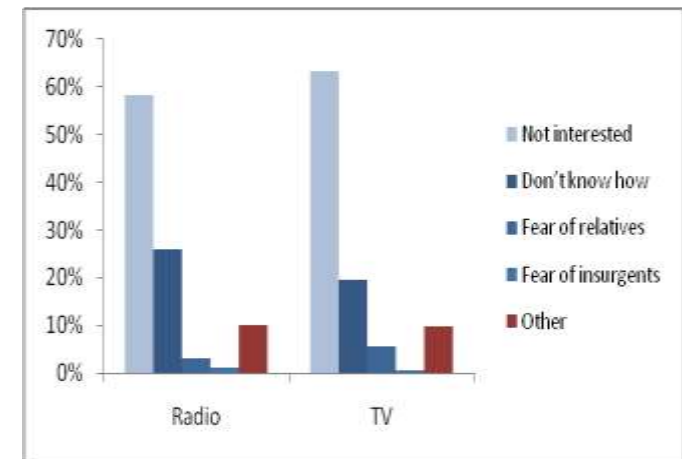- On the **radio** more easily than on TV
- Primarily by **phone**

➔ **However, the information media broadcast is relayed in the community**

- **30% often** discuss what they hear on the media with friends and family; an additional **60%** do it occasionally

Have you ever interacted with the media?
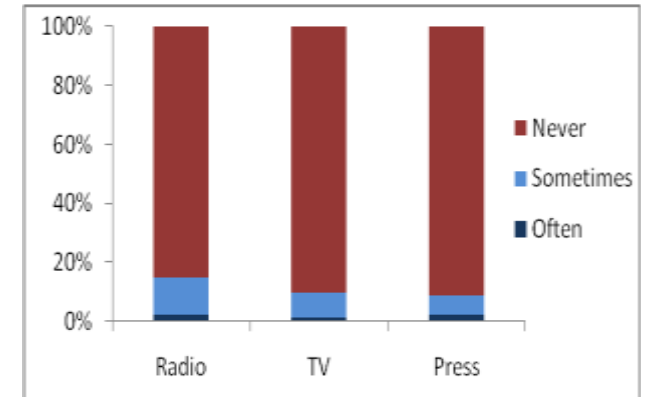
If not, why?

➜ **Media have taken an active place in Afghans lives**

- They are perceived as a **source of new, positive ideas**: the media help open minds
- The majority of interviewers (>80%) acknowledge the media have had **an impact on their own opinions**

> *"Because of the media, our women became open minded and aware, to the point where they argue with us about sending our girls to school and wanting to enroll in educational courses themselves."* (Male farmers, Kishim)

➜ **Some negative impacts are reported as well**

- Mostly stemming from exposure to **un-Islamic ideas, sensationalistic debates, or programs against national unity**, hence a expectation for some degree of control

➜ **Information campaigns (on health, education, etc.) are considered useful overall**

- But not many people want more of them, showing they have already been exposed a lot

> *"The mullahs get annoyed, because no one is going to the mosque to pray in the evenings, because everyone is watching serials."* (Male villager, Parwan)

Do you think the media change your opinion?

III. OPPORTUNITIES

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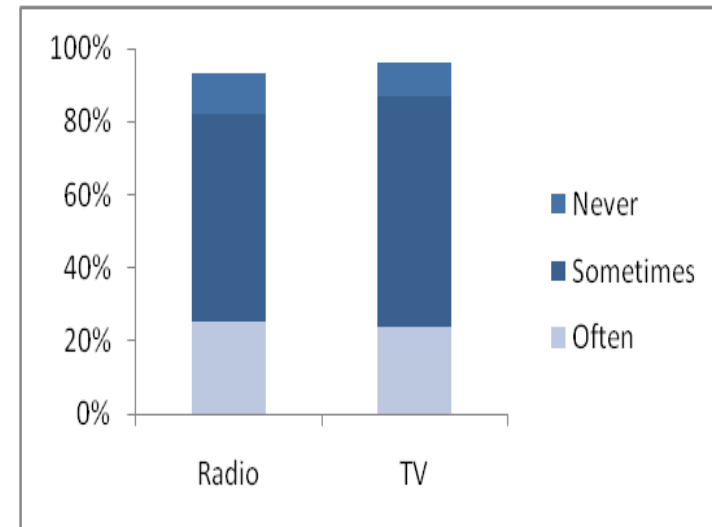
➜ Media confirm their role as **the primary communication channel across the country**; they could be leveraged even more efficiently

➜ Afghans from all backgrounds expect the media to "do the right thing" and play a number of key roles in shaping the future of the country:

- Holding the **government accountable**, but using the right tone: pointing out acts of corruptions, while respecting the difficult mission of the government
- Bringing positive news about **achievements in reconstruction** and explaining what's being done
- **Educating all Afghans**, to begin with women who don't have access to education
- Promoting **national unity** and **Afghan culture**
- Help Afghans build their **identity** beyond religion
- Inspire a **sense of purpose** especially among youth

➜ These expectations are consistent with most development and stabilization goals

"The majority of the people can be educated via the media. Even the women who never leave the house can learn the same things from the media."
(Male farmer, Shulgara)

"If we watch the news for 30 minutes, its 20 minutes of killing and suffering, and the other 10 minutes is about political meetings.

There is no news on development, economics, the value of our commodities […].

For example, does anybody know anything about our progress this year? How many students went to university this year? How many graduated from high school?"
(Male, Kandahar city)

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➔ Generate more programs on development achievements

- Not only **achievements** of development community, but also **stories of succeeding Afghan individuals and communities**, in a motivational role

➔ Work on contents

- Generally, work on increasing the **quality of programs**: news, education, talk shows, motivational shows, cultural programs
- Develop better quality contents delivering **technical information** (education, agriculture, etc.)
- Promote a better usage of existing content, **sharing of content with local media**, etc.
- Promote **Afghan production** including for drama

➔ Carefully plan information campaigns

- Use relevant channels, matched with accurate / recent audience data to better **target specific audiences** with a greater impact. Avoid saturation.

➔ Targeted creation of / assistance to some media outlets is still possible

- For **non-permissive areas**, areas with few economic opportunities, or weak but interesting media outlets. Help **extend the coverage of most promising** / successful outlet

IV. KEY TAKEAWAYS

→ The development of Afghan Media in the last 8 years is **a unique success story**

→ The last 5 years show a remarkable growth with limited international assistance

→ Some newly created outlets have, however, clear **political / religious affiliations,** which are negatively perceived by most users: independence is at risk

→ While radio is still listened by 2/3 of Afghans, **TV is taking over in urban centers** and picking up in rural areas when electricity allows it

→ Initial **cultural resistance to TV tends to disappear**; however, cultural sensitivity is high among all audiences (included educated urban) and some control is expected

→ TV and radio have a clear **impact in shaping opinions**, and are generally **trusted**

→ This confers the media **a strategic role**, and they are expected to "do the right thing", educate, promote **Afghan culture and national unity**, and the country's reconstruction

→ *There is a broad range of opportunities for the international community to continue supporting a balanced development of the media, in line with most development and stabilization objectives*

QUESTIONS?

ANNEX

➔ In audience share, Tolo is consistent throughout the day:

- Average 36% hour by hour
- Main peak in audience share is at 18:00, with 68%, but this represents only 450,000 viewers
- Prime-time effect: highest peak is at 20:00, representing 1.8m users
- Only time at which there are significant contender is 21:30 – 22:00, where *Dulhan* or *Who wants to be a millionaire* gather about 1 million users on Ariana

➔ Four of five most-watched programs are on Tolo

- Three serials (*Kyunki, Kasauti, Duya-e Asrar*) and one game (*Deal or No Deal*)

➔ Tolo's audience is close to the average

- But slightly more female, more literate and more middle-class

Audience share

Tolo

Estimated total audience

30
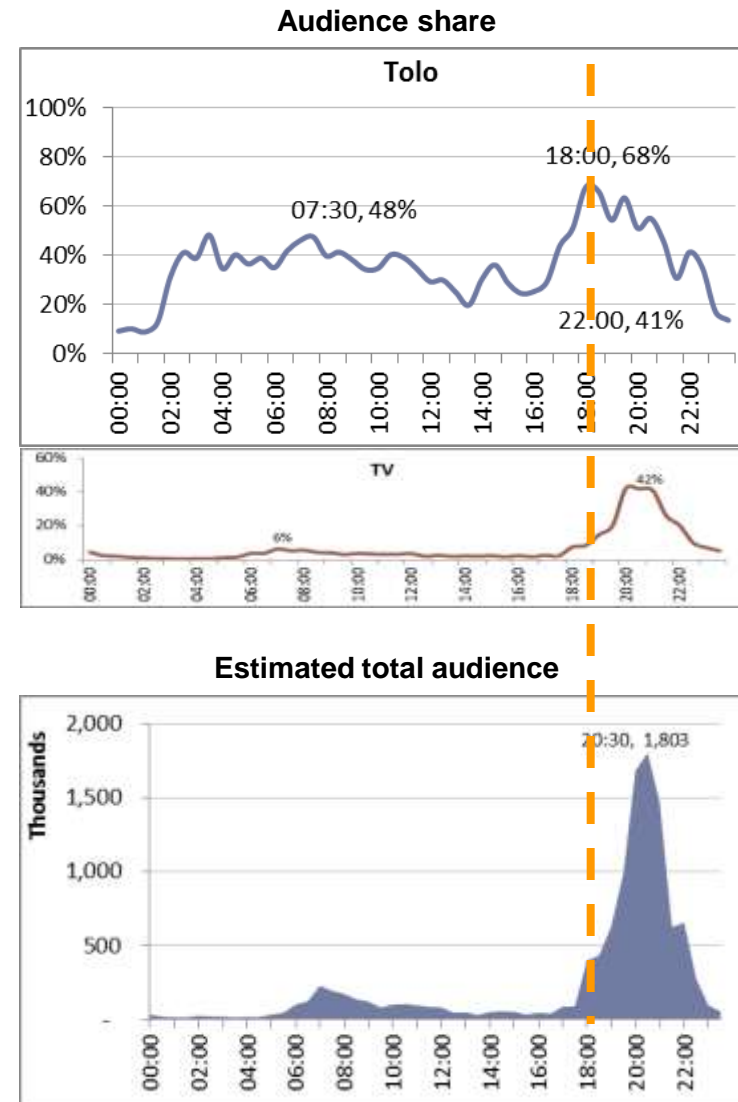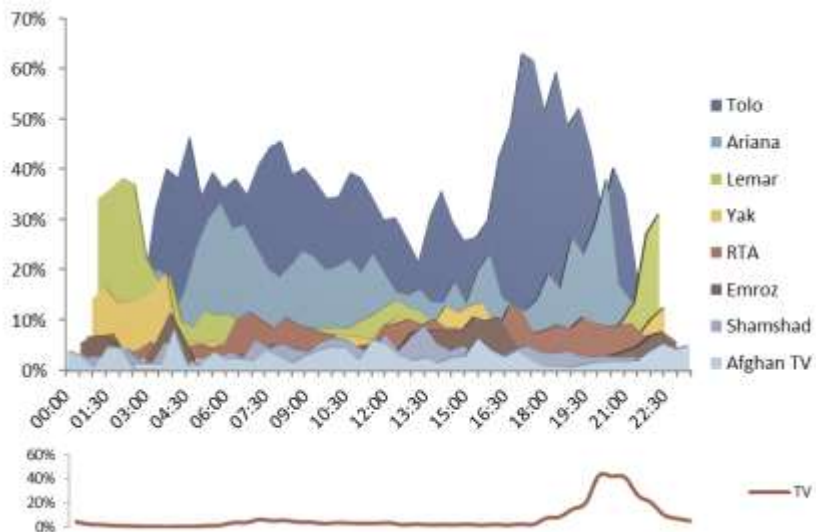
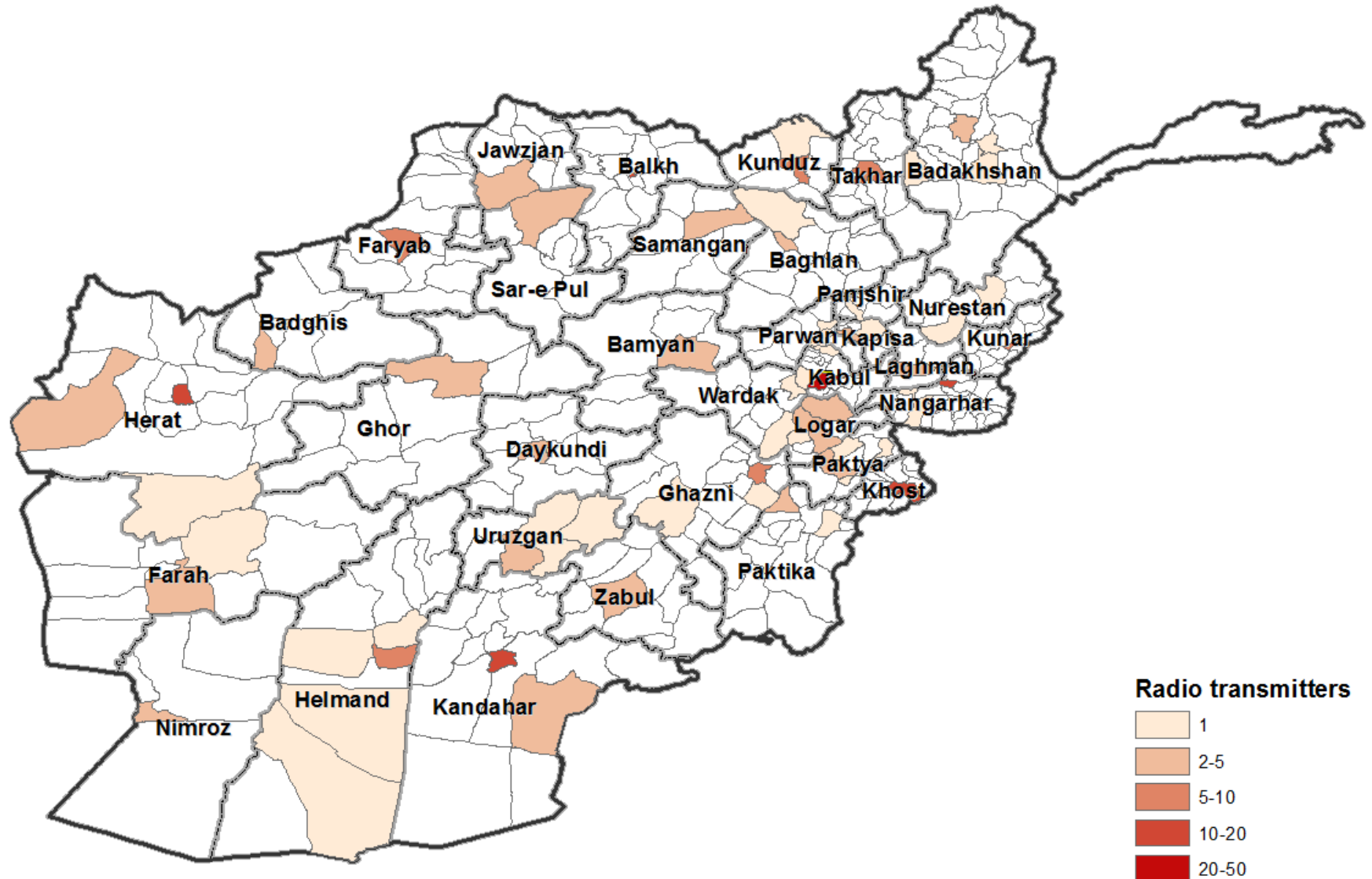| Age	Tolo	Ariana	RTA	Lemar	Yak	Emroz	Shamshad	Afghan TV
15-20	-1.5%	0.2%	-6.1%	1.9%	-3.9%	29.1%	12.2%	11.0%
20-30	1.6%	0.1%	-8.9%	3.2%	6.6%	-13.8%	-2.5%	-12.8%
30-40	-0.2%	-1.0%	6.6%	0.3%	3.9%	-7.6%	-5.4%	-2.4%
40-50	-0.8%	0.7%	7.9%	-3.0%	-5.0%	-3.9%	-0.7%	7.9%
50+	1.0%	-0.1%	0.5%	-2.4%	-1.5%	-3.9%	-3.6%	-3.8%
Gender	**Tolo**	**Ariana**	**RTA**	**Lemar**	**Yak**	**Emroz**	**Shamshad**	**Afghan TV**
Female	4.66%	-1.56%	-4.01%	-17.96%	10.77%	-18.04%	-8.18%	6.57%
Male	-4.66%	1.56%	4.01%	17.96%	-10.77%	18.04%	8.18%	-6.57%
Literacy	**Tolo**	**Ariana**	**RTA**	**Lemar**	**Yak**	**Emroz**	**Shamshad**	**Afghan TV**
Low	-1.85%	3.09%	6.02%	-4.27%	5.18%	-13.11%	4.49%	3.71%
High	1.85%	-3.09%	-6.02%	4.27%	-5.18%	13.11%	-4.49%	-3.71%
Education	**Tolo**	**Ariana**	**RTA**	**Lemar**	**Yak**	**Emroz**	**Shamshad**	**Afghan TV**
None	-0.58%	1.87%	0.54%	-2.74%	1.51%	-2.22%	-2.88%	8.30%
Primary	-1.37%	-0.25%	5.75%	0.12%	4.43%	-9.42%	9.42%	-1.90%
Secondary	0.59%	0.33%	-3.88%	3.05%	-12.20%	15.07%	-4.94%	1.93%
University	1.16%	-2.07%	-2.13%	0.18%	6.50%	-2.77%	-1.00%	-7.95%
Income	**Tolo**	**Ariana**	**RTA**	**Lemar**	**Yak**	**Emroz**	**Shamshad**	**Afghan TV**
0 - 100	-0.33%	2.14%	-0.98%	-4.93%	3.28%	-2.04%	-6.19%	7.76%
100 - 250	-2.62%	4.84%	6.94%	-5.13%	2.81%	-6.36%	-3.76%	3.31%
250 - 500	1.22%	-5.08%	-2.66%	-1.83%	0.92%	20.49%	16.43%	-1.61%
500 - 1000	1.18%	-1.08%	-4.13%	2.88%	-0.71%	-7.41%	-4.07%	-0.80%
1000 - 1500	0.86%	-1.29%	2.00%	1.94%	-3.67%	-4.80%	-0.41%	-5.48%
1500+	-0.31%	0.46%	-1.16%	7.06%	-2.64%	0.13%	-2.00%	-3.18%

→ **Return**

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Identified radio transmitters locations

altai consulting

Radio transmitters

- 1
- 2-5
- 5-10
- 10-20
- 20-50

TV transmitters

- 1
- 2
- 3-5
- 5-10
- 10-43