# AFGHAN MEDIA IN 2010

## Executive Summary

**Background**

In 2004-2005, USAID's Office of Transition Initiatives contracted Altai Consulting for the first comprehensive media evaluation ever conducted in Afghanistan. The aim was to examine the Afghan Media's impact on opinions and behaviors after three years of media sector reconstruction efforts. Since the publication of that report, substantive changes have been observed in the Afghan media sector. In order to inform future international community and commercial investments the study endeavored to create a comprehensive picture of Afghan media, its users, their preferences and expectations, and measure its impact on public opinion and behavior.

Research conducted from March to August 2010 combined quantitative and qualitative methodologies including: a literature review; direct observations; key informant interviews; 6,648 close-ended interviews in 107 districts, covering all of Afghanistan's 34 provinces; a daily week-long audience survey of over 1,500 individuals; approximately 200 qualitative, open-ended interviews; and ten community case studies. This effort guarantees that findings reported here are reasonably representative of the overall Afghan population.

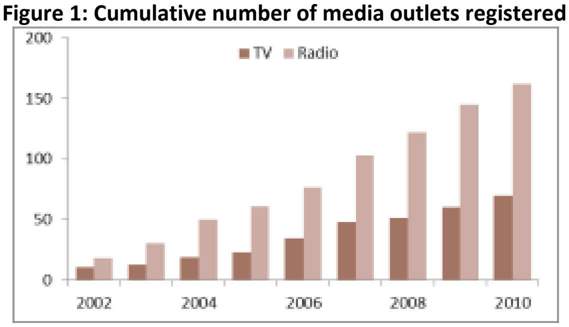
This document summarizes a comprehensive synthesis of data collected during this survey. The full synthesis report, as well as a database of media actors, 16 priority district reports, ten case-study reports, a complete description of the methodology, the original datasets from the main quantitative research, and the audience research, are publicly available and thus allow anyone interested to extract information on more focused areas, as the need arises.

## Main findings

**Media landscape**

The sector's remarkable growth has averaged 20% *each* of the past five years. This corresponds about 50 new TV stations and over 100 new radio stations since January 2006. The vast majority of these are indigenous developments, with minimal international assistance.

**Figure 1: Cumulative number of media outlets registered**




Despite this vast array of new media outlets, the field is still dominated by a handful of established players. A large proportion of the new media outlets have been launched by and for specific political or religious interests. While these outlets do not substantively compete for advertising, mostly relying on private funding, their overt orientations are perceived as threatening the sector's independence and promoting political, ethnic and religious dissention by many of the nation's commercial media players.

Media development since 2005 has essentially focused on urban areas, targeting both Kabul and the largest Afghan cities. Besides several semi-national networks covering multiple provinces, most of the new entities are local television and FM-radio stations with a relatively small broadcast footprint. This has led to further discrepancies in the amount of media available to urban and remote/rural audiences.

The media's operating environment has slowly and imperfectly, but steadily developed. The regulatory environment development process, within the Afghan context, appears to be on the right track, with most concerned actors and stakeholders expressing satisfaction with the process. One main area of debate remaining is the ideal level of editorial independence of the state broadcaster (RTA).

The media sector has become a profitable industry, relying heavily on commercial advertising which generates approximately $50m/year in revenues. Other sources of funding are private and public subsidies of different origins.

The continued development of the sector is generating new needs for related commercial skills and services – increased professional development and training

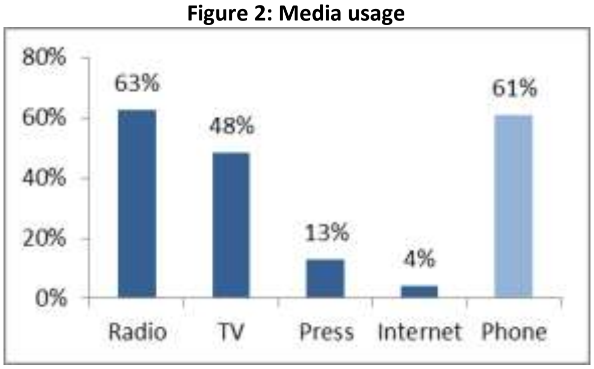
This publication was produced for review by the United States Agency for International Development by Altai Consulting. The authors view expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

capacity, greater content production expertise, hardware maintenance, and better advertising services.

**Consumption, audience**

Television use is replacing radio use in urbanized areas. Correlated closely with access to electricity, television set ownership and usage have dramatically increased; now reaching 48%. Reactionary criticisms of television are directed more towards specific television content, rather than at television as a medium.

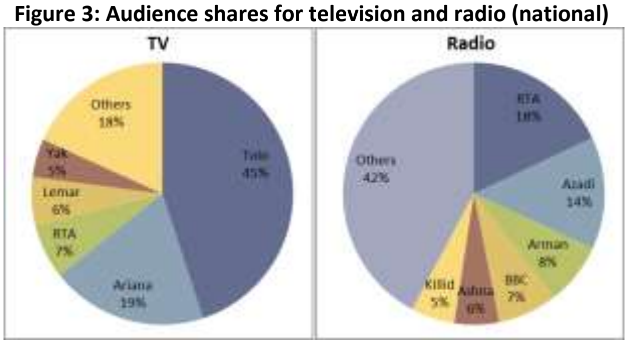
**Figure 2: Media usage**




Overall broadcast media continues to build audience, and to some degree at the expense of print media. Internet usage is still marginal (4%), despite some progress in infrastructure and a emergent interest among university students. Experiments in information dissemination via mobile phones show promise.

Television has five players capturing more than 80% of the audience with the Moby Group, Tolo TV (45%) and Lemar TV (6%), representing half the market.

**Figure 3: Audience shares for television and radio (national)**

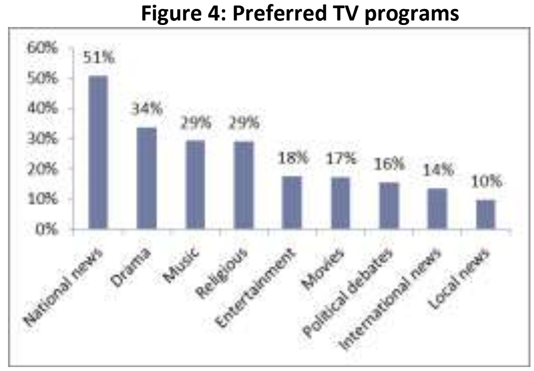



The radio landscape is more fragmented; six stations share slightly more than half the listening audience, while the other half is divided among the remaining 112 stations. Community radio stations (state and independent) are often strong in their broadcast areas where their content is of high quality and relevant to the community they serve. This is also true of a few military stations.

**Programs**

National news and entertainment shows (serials, music, games, and movies) are the most popular programs in spite of a reported strong demand for more religious and educational programs. Entertainment programs dominate prime-time.

**Figure 4: Preferred TV programs**




**Perceptions, roles, and impact**

The level of confidence placed in media is very high, with media considered the primary source of reliable information on most topics. However, Afghans seek confirmation of important news through a variety of sources, other media and word of mouth.

State-run RTA is praised by many for its national reach, and seen as fostering national unity in spite of its bias for government. This state control of RTA is often seen as preferable to the "uncontrolled" content on some private media. Disrespect of Afghan culture and religion is a common reproach of commercial media and divisive politics is an issue for political/religious media.

Overall, media is generally viewed by Afghans as a positive force in society, celebrated for addressing key issues—economy, crime, and corruption—and is seen as a way to open minds and educate.

Yet Afghans' expectations of media are now substantively higher than information dissemination and entertainment. With their increased media sophistication Afghans want their media to serve additional societal roles: act as **a watchdog** of government; **provide education**; **promote national unity** and **Afghan cultural identity**; inspire a **sense of purpose**, especially among youth; and more comprehensively address the country's **reconstruction activities and achievements.** With media's increased penetration of Afghan homes their responsibility to "do the right thing", was a clear and broadly held perspective.